



## 2006 Meeting Minutes Area 3

- December 12, 2006
  - November 21, 2006
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  - June 20, 2006
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- 

### **Taxpayer Advocacy Panel (TAP) Area 3 Committee Meeting Minutes**

**Committee's Annual Meeting, Washington, DC  
December 12, 2006; 1:15PM-5:15PM**

#### **Designated Federal Official (DFO)**

Carolyn E. Lewis, Taxpayer Advocate Program Analyst

#### **Members Present**

Armstrong, Mary, FL  
Cooper, Dale III, GA  
Corderio, Daryll, AL  
Edwards, Byron, GA  
Marker, Patrice, FL  
Matheny, William, MS  
Mosler, Hank, FL  
Paris, Mark, FL  
Scott, Max, LA  
Wright, J.T., GA

#### **Members Absent**

Rodriguez, AL, FL  
Tice, Chuck, FL  
Tremblay, Donna, FL

#### **Staff Present**

Nancy Ferree, TAP Program Manager  
Sallie Chavez, TAP Program Analyst  
Isai Pallango, TAP Staff & Note taker



### **Welcome / Announcements**

Chair J.T. Wright opened the meeting by welcoming everyone and asked new panel members to introduce self and provide personal information.

### **Introduction of Committee Members**

Chair J.T. Wright stated that he was looking forward to working with new and returning panel members. It was noted that Wright was expecting a productive year from all panel members.

### **Elections for Area 3 Chair and Vice Chair**

Chair J. T. Wright suggested panel members should consider becoming Chair and Vice Chair of Area 3. Program Manager Nancy Ferree stated that a new Chair and Vice Chair needed for new direction leadership and will email all members instructions on a productive chair / vice chair.

Committee Member Patrice Marker provided valuable information of Chair and Vice Chair position. It was noted that panel members Hank Mosler was voted Chair of Area 3 and Dale Cooper III was voted Vice Chair. All panel members agreed by consensus on this issue.

### **Discuss standing conference call dates and face to face meeting locations and dates and quorum**

New Chair of Area 3 Hank Mosler mentioned during last teleconference that Committee discussed having the Area 3 Face to Face Meeting in late January or early March of 2007. Panel members stated dates would be difficult on tax professionals.

Program Analyst Sallie Chavez provided details and time of teleconference meetings. Chavez also mentioned meeting in Atlanta or New Orleans face-to-face location would be suitable for all panel members. It was stated that February 22-24, 2007 would be considered. Panel members agreed by consensus on this issue.

New Committee Chair Hank Mosler asked if it would be possible to bring in the 3 new members who were not able to attend the Annual Meeting to the face-to-face meeting early and have an orientation before the actual face-to-face meeting.

### **Structure/Subcommittees**

Panel Member William Matheny stated the importance of becoming Chair and Vice Chair. Panel Member Matheny provided description of panel member's duties and assignments. Panel Member Matheny also gave details of documents related to TAP staff and the importance of utilizing TAP staff.

### **Set Up New Subcommittees**

Panel member Bill Matheny requested panel members to form "Sub-Committees" Matheny requested all panel members to join a sub committee. Panel member J.T. Wright suggested that new panel members choose a mentor. Panel members agreed by consensus on this issue.

### **Outreach**

New Chair of Area 3 Hank Mosler requested that new panel members get involved with the outreach program. It was stated that new panel member Mark Paris will be heavily involved with certain aspects of the program.

### **Questions and Answer / Closing**

Chair welcomed new panel members and provided valuable information on becoming a productive panel member. No questions were asked of chair.



Chair adjourned the Area 3 annual meeting.

**Next Teleconference Meeting: January 16, 2007 at 11:30AM ET**



## **Area 3 Committee Meeting Minutes November 21, 2006**

### **Members in Attendance**

J T Wright  
Bill Matheny  
Henry Mosler  
Max Scott

### **Members Absent**

Daryll Cordeiro  
Patrice Marker  
Joyce Natter

### **DFO present**

Carolyn Lewis

### **Staff in Attendance**

Sallie Chavez, TAP Program Analyst  
Bernie Coston, TAP Director

### **Welcome**

Committee Chair J. T. Wright opened the meeting by welcoming everyone. He wished everyone a Happy Thanksgiving. Committee Member Chris Dreska has resigned.

### **Roll Call**

Quorum of four (4) was met.

### **Introductions of Guests**

TAP Director Bernie Coston advised that Committee Member Chris Dreska has resigned. He advised the request for volunteers for TAP Chair and Vice Chair is still open. The new panel members have been approved and are being advised of their selection at this time. He wanted to thank the retiring members for their service to TAP. He addressed the chair training that will take place in early January. He has polled the chairs for those who want to stay on as chairs. He discussed the hot issues for the IRS in 2007, which include update on Telephone Excise Tax, split refunds, financial literacy, private debt collection and the TACs.

### **Review of Previous Meeting Minutes**

The meeting minutes were approved as written



## **Review of Joint Committee Call**

Committee Chair J. T. Wright stated some of the issues from the Joint Committee Call have already been covered. The volunteers for the Annual Meeting Workshops have been notified. The workshops are Outreach and How to Write a Referral Report.

There was a discussion about success stories including Area 7 being invited to the AARP meeting and Area 4 making a presentation to NATP.

TAP Director Bernie Coston advised that there would be a revision to the FACA Database in the near future.

Committee Chair J. T. Wright requested assistance with the self-assessments.

## **Subcommittee Report**

The subcommittee of Hank Mosler and Joyce Natter had no report.

Committee Chair J. T. Wright gave the report for his subcommittee. Issue 3671 was returned to the committee for additional work. It needs additional information and is being reworked.

Committee Member Bill Matheny discussed the conference call his subcommittee had which included members from Area 2 and 5. There are eight members on the subcommittee. They discussed the issues in general. There was some discussion about the survey that the TAC Issue Committee is doing with the help of the total membership of TAP. The subcommittee would like to get input from all the TAP members about their experiences with the TACs. Committee Member Matheny asked Committee Chair J. T. Wright to discuss this at the next Joint Committee Meeting.

Committee Chair J. T. Wright reported that Issue 3934 was going to be resent to the Joint Committee as Area 4 has withdrawn their issue from this recommendation. It will be going out for a final revision.

## **Election of Chair**

Committee Chair J. T. Wright advised that members would be asked to declare their intent to run for Chair or Vice Chair by the AM of the first day of the Annual Meeting. The announcement of the Chair and Vice Chair will be after the break on the second day. He has volunteered to run for TAP Chair.

## **Meeting Schedule**

The Master Calendar is posted on TAPSpeak. It will be proposed to keep the conference call at the same time for next year, which is the third Tuesday of the month. It is proposed to have the Face-to-Face meeting February 22 – 24 in either Atlanta or New Orleans. DFO Carolyn Lewis is not available however; she can get someone to take her place. Committee Member Bill Matheny said he would be able to attend if the meeting is in New Orleans. Committee Member Hank Mosler requested the meeting to be earlier in the week. This will be finalized during the Annual Meeting.

## **Outreach**

Committee Chair J. T. Wright said there would be major emphasis on outreach for next year. It was suggested to try to put something together for newspaper after each meeting.



### **Citizen Input**

No citizens present.

### **Election of Officers**

Committee Chair J. T. Wright requested members to think about who you want to be Chair of Area 3. He said if he isn't elected as TAP Chair he would be willing to continue as Area 3 Chair. Committee Member Bill Matheny stated he is NOT interested in being Chair.

### **Meeting Close**

Next meeting is the Annual Meeting in Washington, DC, December 11 – 14, 2006.



## **Area 3 Committee Meeting Minutes October 17, 2006**

### **Members in Attendance**

J T Wright  
Bill Matheny  
Joyce Natter  
Max Scott  
Christopher Dreska

### **Members Absent**

Henry Mosler  
Daryll Cordeiro  
Patrice Marker

### **DFO present**

Carolyn Lewis

### **Staff in Attendance**

Nancy Ferree, TAP Program Manager  
Sallie Chavez, TAP Program Analyst  
Isai Pallango, Intern and Note Taker

### **Welcome**

Committee Chair J. T. Wright opened the meeting by welcoming everyone.

### **Roll Call**

Quorum of five (5) was met.

### **Review of Previous Meeting Minutes**

There was discussion of prior meeting minutes and these minutes will be forward via email by Program Analyst Sallie Chavez for approved by consensus via email.

### **Review of Joint Committee Call**

Committee Chair J. T. Wright discussed face-to-face joint committee meeting topics discussion was on vision statement and asked members to think about an appropriate message during up coming annual meeting. Chair J. T. Wright also discussed possible teleconference meeting every other month, but panel member Max Scott stated his displeasure. Annual meeting in Washington discussed and panel members agreed to visit agenda topics on TAPSpeak website.

TAP Manager Nancy Ferree mentioned up coming TAP social event during annual meeting in Washington and encouraged panel members to attend and get to meet other TAP members. Panel members were encourage to bring spouse or significant others; would be a great place to meet other members.



## **Subcommittee Report**

### Issue 3734 – Downloadable Form 1099-MISC

Panel member Joyce Natter explained that Area 3 Joint Committee requested adjustments to this issue. There was some discussion about other areas and their disagreements. Natter shared panel member Allena Kaplan comments and concerns. Chair J. T Wright will take a lead roll on getting everything accomplished.

### Issue 3604 – Change Correspondence from English to Spanish

Committee Chair J. T. Wright stated that other panel members were concern that Spanish was the only language on issue. TAP Manager Nancy Ferree stated that issue was elevated to the IRS.

### Issue 3921- Expanding Third Party Authorization

Panel member Bill Matheny recommended that the authorization be one year from the date of extension. There was much discussion on this during the Joint Committee Meeting, however it was elevated. Panel member thanked positive input from chair J.T. Wright. TAP Manager Ferree requested different areas members working on similar issues to designate a sub committee, form two to three members, and resolve issue. Ferree stated she would work closely with Program Analyst De Jesus and Chavez to make sure panel members are not working on same issues.

### Issue 3537- Set-Up Bank Account for Fund Check

Panel member Bill Matheny discussed the issue of refund splitting. This was already approved for implementation starting this year. The other issue is that of the refund for the un-banked. TAP Manager Nancy Ferree mentioned that Nina Olson and her attorney advisor created The Financial Literacy Toolkit to help the un-bank population. Ferree will send The Financial Literacy Toolkit via e-mail to panel members and would welcome recommendations.

### Issue 218 – Checkbox Authority

Panel member Bill Matheny stated that the survey showed IRS employees are not providing adequate Checkbox Authority. Committee Members thought most of the problems where from toll-free lines. He requested a SME from toll-free to see what procedures are for toll-free employees. Panel member will look into field assistance program and make recommendation to the IRS for employees. Panel member sought comments or questions; none provided.

### TAC Issues

Panel member Bill Matheny stated there are various issues including delays on payments in IRS walk-in sites. The issue will be worked on with Area 2 and Area 5 and form a sub committee and proceed forward. Questions requested from panel members, but none provided. Panel member Matheny mentioned that Area 6 submitted a proposal and was elevated.





### **Outreach**

Committee Chair J. T. Wright reported that Committee Members should explore more opportunities to reach taxpayers concerning Taxpayer Advocacy Panel. Chair J.T. Wright expressed his concern that a lot of burden will fall on different areas of TAP and stated that panel members should become more effective. Committee Chair J. T. Wright wants continuous improvement via newspapers and radios in order to reach input from tax filers.

### **Citizen Input**

No citizens present.

### **Meeting Close**

Next meeting is the November 21, 2006.



## **Area 3 Committee Meeting Minutes September 19, 2006**

### **Members in Attendance**

- J T Wright
- Bill Matheny
- Joyce Natter
- Max Scott
- Patrice Marker
- Daryll Cordeiro

### **Members Absent**

- Christopher Dreska
- Henry Mosler

### **DFO Present**

- Lisa Laurent (acting for Carolyn Lewis)

### **Staff in Attendance**

- Sallie Chavez, TAP Program Analyst

### **Welcome**

Committee Chair J. T. Wright welcomed everyone including Lisa Laurent who is acting for Carolyn Lewis as DFO.

### **Roll Call**

Quorum of five (5) was met.

### **Review of Joint Committee Call**

Committee Member Patrice Marker reported that TAP Director Bernie Coston has forwarded the applicants to NTA Nina Olson for approval. The Joint Committee discussed the election of the TAP Chair and Vice-Chair but had to postpone the discussion until the October meeting. The IRS Oversight Board asked TAP for input into some long term goals. A small group of chairs responded to this since it was a short-timeframe request.

Committee Member Bill Matheny asked about the status of the Public Debt Collection. TAP Analyst Sallie Chavez reported that the Senate has written a bill that should be voted on within the next 2 weeks. The bill included a section about the TAP's opposition to the Public Debt Collection. TAP Analyst Chavez will forward this bill to the entire committee.

### **Review of Previous Meeting Minutes**

There was a discussion of the meeting minutes. The minutes were approved by consensus.



## Subcommittee Report

- Issue 3734 – Downloadable Form 1099-MISC  
Committee Member Joyce Natter explained that the Joint Committee suggested this recommendation be combined with an Area 1 issue. There was some discussion about the areas of disagreement. The combined subcommittees are having a conference call with a SME on September 21. She is hoping they will have something by the end of the month.
- Issue 218 – Checkbox Authority  
Committee Member Bill Matheny had asked DFO Carolyn Lewis to try to get information on the checkbox and how employees are trained. She was not able to get a SME. Acting DFO Lisa Laurent said she spoke to the TAC manager in New Orleans. Employees do receive training in a refresher course each year. There is an indicator on the account that indicates the box was checked. Committee Member Matheny said most of the problems were from toll-free. He requested a SME from toll-free to see what their procedures are for toll-free employees.
- Issue 3671 – SSN not matching Name on e-filed returns  
Committee Member Patrice Marker stated this was finalized. TAP Analyst Sallie Chavez reported this was forwarded to the Joint Committee with the Area 3 Chair's Report in August.
- Issue 3604 – Change Correspondence from English to Spanish  
TAP Analyst Sallie Chavez reported that Committee Member Chris Deska has just completed the recommendation. It has been forwarded to the other subcommittee members for their comments. This will be reviewed and forwarded to all committee members via email for their approval before October 5.

## New Issues

- Issue 3872 – Cost of Sending Duplicate Notices to Representatives  
Committee Member Bill Matheny reviewed this issue. It appears this will be corrected by January 2007. He suggested that the committee monitor it. Put it in the parking lot.
- Issue 3929 – Lack of Annual Communication to Individual Taxpayers  
Committee Member Bill Matheny reviewed this issue. It was agreed this was a good issue to pursue. Committee Member Max Scott said it should also include those who use a software package such as Turbo Tax. It was agreed to put this in active and assign it to Committee Member Patrice Marker's subcommittee.
- Issue 3985 – Form 6252 Contract Price  
Committee Member Bill Matheny reviewed this issue. The committee thinks it is a good suggestion but decided to put it in the parking lot until the Annual Meeting.
- TAC Issues  
Committee Member Bill Matheny said there are seven (7) issues involving the Taxpayer Assistance Center. There are two (2) basic themes for these issues – lack of service & lunchtime and unable to make payment. Committee Member Matheny sent these to the TAC Issue Committee but they will not work these issues. There was much discussion about this but it was decided that these types of issues should be worked by the area.

TAP Analyst Sallie Chavez stated there are several other issues similar to these on the TAP Database. It was agreed to pull all these issues to Area 3 rather than having several areas working the same issue. Committee Member Bill Matheny's subcommittee will work these issues. He would like to know the location of all these issues. He would like to know if a letter can be written to the Territory



Manager for each of these issues and ask for the procedure in their office. TAP Analyst Sallie Chavez said the procedure should be the same for all TAC offices however there are large, medium and small offices and there is a slight difference in procedure there. TAP Manager Nancy Ferree will be contacted to see if this is appropriate.

### **Outreach**

Committee Chair J. T. Wright reported that Committee Member Max Scott visited several congressional offices last month. There also were several news releases concerning the TAP's letter to the IRS Commissioner.

### **Other Issues**

Committee Chair J. T. Wright said he received an issue. The taxpayer had a \$20,000 bill. He paid it and then the IRS come back and told him it was only \$2,000. The taxpayer has asked for a letter from the IRS stating their error and the IRS will not send one. Taxpayer has a refund check for \$18,000 but has not cashed it yet because he feels it is in error. He cannot get a response from the IRS. TAP Analyst Sallie Chavez suggested Committee Char Wright refer this person to the Local Taxpayer Advocate.

### **Meeting Close**

Next meeting is the October 17, 2006.



## **Area 3 Committee Meeting Minutes August 15, 2006**

### **Members in Attendance**

- Wright, James (JT)
- Matheny, William
- Scott, Louie (Max)
- Mosler, Henry
- Dreska, Christopher
- Marker, Patrice

### **Members Absent**

- Cordeiro, Daryll
- Natter, Joyce

### **Designated Federal Official Present**

- Carolyn E. Lewis

### **Staff in Attendance**

- Nancy Ferree, TAP Program Manager
- Isai Pallango, Student Intern

### **Public Present**

Committee Chair J. T. Wright welcomed citizen, Cathy Blakeney from De Kalb County in Atlanta, Georgia to teleconference meeting.

### **Roll Call**

Quorum was met.

### **Review of Prior Meeting Minutes**

Committee chair J. T. Wright stated approval of June 20, 2006 minutes by consensus.

### **Review of Joint Committee Call**

Committee chair J. T. Wright continued on topic of "Review of Joint Committee Call" which was held on August 2, 2006.

The first item on the agenda was the National Office Report which was presented at the face to face meeting, but a new item was presented. All members should have received an email regarding a TAP vision statement as well as volunteer position description, to properly document, track and measure effectiveness of volunteers. All participants agree this would be good idea to extend opportunities of TAP members to be on various committees and develop certain documents. This email came from Barbara Toy on August 10, 2006. Access to this document would be to members only.



### **Election of Officers**

Committee Chair J. T. Wright and Joint Committee stated that election of TAP Chair and TAP Vice-Chair process during annual meeting delayed organization and project issues. Question presented to committee was "required qualifications" for TAP chair and TAP vice-chair. Committee Chair J. T. Wright asked for member input on improving the process, including electing these officers prior to the annual meeting.

All members of committee came to a consensus that all Candidates should make a presentation and the election should occur early in the annual meeting.

### **Review of NTA Objectives Report**

Program Manager Nancy Ferree gave a brief overview and asked everyone to familiarize themselves with these objectives. Program Manager Ferree asked for any questions from the committee, but none was asked.

### **Subcommittee Report**

- Issue 3734 - Change Downloadable Form 1099  
Committee Member Hank Mosler discussed the delay with the elevated issue to incorporate similar issues from other areas. This subcommittee has been working with these other areas on this issue. Committee Chair J. T. Wright and committee agreed to revisit issue.
- Issue 3869 - 1009R Non Standard 1009-R  
Committee Member Hank Mosler discussed this issue. The Subcommittee recommends dropping the issue. Committee agreed to drop issue.
- Issue 3671 - Electronic Filing Rejects due to Name Problems.  
Committee Member Patrice Marker discussed and recommended to elevate this electronic filing issue due to name recognition problems. Committee Chair J. T. Wright praised Committee Member Patrice Marker for bringing this issue forward and for her excellent research. Committee agreed to elevate the issue after the editing committee reviews the proposal.
- Issue 3604 - Mailing Notices in Different Languages.  
Committee Member Christopher Dreska agreed to follow-up this issue with TAP Analyst Sallie Chavez upon her return to the office.
- Issue 3921 - Expanding the Third party authorization Term  
This issue is completed per Committee Member Bill Matheny. Committee Chair J.T. Wright will forward this issue to the Joint Committee.
- Issue 218 - Internal Revenue Service Honoring Third Party Checkbox  
Issue was raised by IRS practitioners and concerns of possible problems. Panel members attended the Tax Forum and conducted surveys of practitioners, and most agree problems existed. 161 surveys completed. 43 aware of checkbox, with no problems, 61 did not use checkbox, 51 used checkbox and had problems with IRS honoring the checkbox. Based on this survey, there appears to be a problem. Many practitioners stated that although they had the return in front of them, and had the checkbox checked, the IRS employee would not honor the checkbox. One or two practitioners stated to alleviate the problem; they would just hang up and call back until they received an IRS employee who would honor the checkbox. Most of the problems arose from telephone contacts. One option is offering training to IRS employees on the checkbox at CPE. Another option is to be sure employees have current desk guides. Committee Member Hank Mosler asked about what type of information is available to the employee when a practitioner calls in. DFO Carolyn Lewis states there is an indicator on the



computer screen that reflects the checkbox authority. Committee Member Bill Matheny states that employees are very concerned about disclosure and security. Committee Chair J. T. Wright suggested that a sub-committee be formed to further discuss improved training of IRS employees. DFO Lewis offered to help out as needed. Committee agreed by consensus to keep this issue active.

### **TAPSpeak**

Committee Chair J. T. Wright asked if there were any issues to discuss today about TAPSpeak. No issues.

### **Outreach**

Committee Chair J. T. Wright stated in the month of July eight positive contacts were made and committee was praised for great work, in particular Committee Member Patrice Marker. Committee Chair Wright thanked Committee Members Bill Matheny, Daryll Cordeiro and Max Scott for great work at the Tax Forum, and the great amount of time and effort put forth. Committee Member Marker mentioned she had previously sent out letters but received no response, but after utilizing Committee Chair Wright's letter, she was able to secure an appointment with her congressman. No further questions or comments.

### **Citizen Input**

Cathy Blakeney from De Kalb County in Atlanta, Georgia asked for assistance from the committee on what she can do as a citizen. Committee Chair J. T. Wright stated she should visit the Taxpayer Advocacy Panel website and relay information to citizens to make them aware of the panel and some of the things the panel is doing. Also, asking them to communicate with the panel to make suggestions. Committee Member Bill Matheny suggested Cathy provide TAP information to friends and acquaintances and encourage them to provide suggestions for improvement to customer service.

Committee Chair J. T. Wright also welcomed Isai Pallango and asked if he had any comments. Isai is looking forward to working with the committee in the future. Committee Member Bill Matheny asked who is taking minutes and Isai indicated he would be recording the minutes today.

### **Meeting Close**

Committee Chair J. T. Wright closed the meeting and noted the next teleconference meeting will be held on Tuesday September 19, 2006 at 11:30 am ET.



## **Area 3 Committee Meeting Minutes June 20, 2006**

### **Members in Attendance**

- J T Wright
- Bill Matheny
- Hank Mosler
- Joyce Natter
- Max Scott
- Chris Dreska
- Patrice Marker
- Daryll Cordeiro

### **Members Absent**

- None

### **DFO present**

- Carolyn Lewis

### **Staff in Attendance**

- Nancy Ferree, TAP Program Manager
- Sallie Chavez, TAP Program Analyst

### **Roll Call**

Quorum of five (5) was met.

### **Review of Joint Committee Call**

Committee Chair J T Wright stated TAP Director Bernie Coston gave the same office report as he gave to the committee at the Atlanta face-to-face meeting. The Communication's Report was vague because the chair was not present. There were several issues assigned to committees from the meeting with the Commissioner. Area 3 was assigned the Private Collection Agency issue. He will be preparing a draft report in the next day or two. He would like any input from committee members and has put the information on TAPSpeak. The Joint Committee is meeting in Denver on June 29, 30 and July 1.

### **Subcommittee Report**

- Issue 3604 – Change Correspondence from English to Spanish  
This issue is being written up.
- Issue 3671 – SSN not matching Name on e-filed returns  
Committee Member Patrice Marker reviewed the issue and the referral that she had written. The wrong version of the proposal was posted on TAPSpeak. The committee decided it needed more research. She will refine and resubmit the proposal.





- Issue 3869 – Federal Government Annuity Form Different than other 1099R Forms  
Committee Member Joyce Natter stated her committee is still working on this issue.
- Issue 3537 – Refund to Create Savings Account  
Committee Member Bill Matheny reported on his trip to DC concerning the refund splitting issue. The IRS is going to allow refund splitting starting next year for up to three (3) bank accounts. He met with Professor Peter Tufano who was part of the original pilot program on this issue. Committee Member Matheny spoke with him about the non-banked taxpayers. Professor Tufano wants to work with the TAP on this issue.

There was discussion that the VITA Issue Committee may be working on a similar issue. **TAP Analyst Sallie Chavez will check on this.**

- Issue 3921 – Expanding Third Party Authorization Term  
Committee Member Bill Matheny discussed the referral report his team prepared. There were several corrections made. The committee agreed, by consensus, to forward this to the editorial committee after the changes are made.

### **Outreach**

Committee Chair J T Wright reported that Committee Member Max Scott did several Congressional visits last week. Committee Member Scott thanked DFO Carolyn Lewis and her staff for helping him with this outreach. He suggests that all the members contact their LTA and try to do the same thing. He plans to visit some of the other Congressional Offices on his own.

Committee Member Bill Matheny reported that he also did some Congressional visits with his LTA.

Committee Chair J T Wright encouraged outreach.

Committee Member Bill Matheny also asked who was going to be attending the Tax Forum in Atlanta next month. TAP Program Analyst stated it would be Committee Members Bill Matheny, Max Scott, Daryll Cordeiro and J T Wright. He also asked if the TAP Logo was being put on the surveys. TAP Program Analyst told him that since it was such a short questionnaire and that the practitioners would have it for such a short time that she did not think it was necessary. TAP Program Manager Nancy Ferree also stated that the logo would be in black and white not color. Committee Member Matheny said to let it go.

### **Area of Interest**

Committee Member Patrice Marker would like to see the questions for the forum. Committee Members Bill Matheny read her the questions.

Committee Chair J T Wright said TAP Program Analyst Sallie Chavez was going to take questions about TAPSpeak but there is no time in today's meeting. Send any questions to her via email and she will assist you.

### **Meeting Close**

Next meeting is the August 15, 2006. **There is no July meeting.**



**Area 3 Committee Meeting Minutes  
May 11-13, 2006  
Atlanta, GA**

**Members in Attendance**

- Daryll Cordeiro, Mobile AL
- Christopher Dreska, Smyrna, GA
- Patrice Marker, Davie, FL
- Bill Matheny, Long Beach, MS
- Joyce Natter, Miami, FL
- Max Scott, Baton Rouge, LA
- J. T. Wright, Carrollton, GA

**Staff**

- Carolyn Lewis, DFO
- Sallie Chavez, TAP Program Analyst
- Nancy Ferree, TAP Program Manager

**Guests**

- None

**May 11, 2006**

**WELCOME**

Committee Chair J. T. Wright welcomed everyone. He thanked TAP Program Manager Nancy Ferree and TAP Program Analyst Sallie Chavez for the great meeting space. There is a full agenda. The timetable is just a guide but the committee wants to achieve the goals of the meeting.

**INTRODUCTIONS OF PANEL**

Committee Chair J. T. Wright asked each member for input. Each member provided comments.

**REVIEW OF PREVIOUS MEETING MINUTES**

February 21, 2006 meeting minutes were accepted by consensus.

March 21, 2006 meeting minutes were accepted by consensus.

April 18, 2006 meeting minutes were accepted with corrections by consensus.

**PIPELINE TRAINING**

TAP Program Analyst Sallie Chavez presented the committee with the Pipeline Training PowerPoint presentation.

**TAPSPEAK REVIEW**

TAP Program Analyst Sallie Chavez presented a live presentation about TAPSpeak.



**IRS RESPONSES TO RECOMMENDATIONS**

Committee discussed the responses received from IRS. They agreed to close as follows:

- 04-054 – Expanding 3rd Party Authority Term – Closed Rejected.
- 04-055 – Third Party Designee, Notices Automatically – Closed Rejected
- 05-054 – Additional Tax Waiver Request – Closed Implemented
- 05-052 – Consolidated Presidentially Declared Disaster Area Information – Closed Partially Accepted
- 05-051 – Form 656, Offer in Compromise Criteria – Monitoring IRS Action – Follow-Up January 07.

**CLOSING REMARKS**

Committee Chair J. T. Wright stated he thought the committee now has a much better understand of TAPSpeak and more understanding of the pipeline.

Meeting was adjourned for the day.

**May 12, 2006**

**Members in Attendance:**

- Darryl Cordeiro, Mobile AL
- Christopher Dreska, Smyrna, GA
- Patrice Marker, Davie, FL
- Bill Matheny, Long Beach, MS
- Joyce Natter, Miami, FL
- Max Scott, Baton Rouge, LA
- J. T. Wright, Carrollton, GA

**Staff:**

- Carolyn Lewis, DFO
- Sallie Chavez, TAP Program Analyst
- Nancy Ferree, TAP Program Manager
- Bernie Coston, TAP Director

**Guests:**

- None

**NEW ISSUES**

Vice Chair Bill Matheny discussed a couple of the parking lot issues.

Issue 3688 – Circular 230 Requirements – it was agreed to keep this in the parking lot as IRS is making some changes.



Issue 3691 – Form 1098 Instruction Change – TAP Program Analyst Sallie Chavez advised that the business schedule C would not be matched under the CP2000 program – if a taxpayer is worried that the lender is not reporting interest paid on a mortgage, the taxpayer should request a statement at the time of filing the return. The committee agrees to drop this issue by consensus.

Vice Chair Bill Matheny discussed the new issues.

Issue 3869 – Fed Gov Annuity Form Different than other 1099R Forms – it was agree to keep this as an issue.

Issue 3870 – Tax Year not on all 1099 Forms – committee requested additional research to check on the Form 1099 instructions for the year – put in parking lot.

Issue 3900 – Schedule H Instructions – it was agree to keep as an issue.

Issue 3902 – Inaccurate Form 1099s – committee requested additional research to check on the law and regulations for both Forms 1099B and DIV – put in parking lot.

Issue 3910 – Delay in TAC Services – committee requested TAP Analyst Sallie Chavez to contact the TAC Issue Committee to see if they have a committee dealing with this issue.

Issue 3913 – Review tax exempt organizations criteria – committee discussed this issue and decided it was legislative.

#### Possible New Issue

Committee Vice Chair Bill Matheny discussed the rejected recommendation from yesterday about the 3rd Party Authorization expiring in 3 years. The committee discussed this and would like to make a recommendation to have the 3rd Party Authorization expire one year from the date filed including extensions based on presidentially declared disasters (such as Hurricane Katrina) and the automatic extensions. The committee agreed, by consensus, to make this a new issue.

#### **REORGANIZE SUBCOMMITTEES AND ASSIGN NEW ISSUES**

Committee Vice Chair Bill Matheny discussed the subcommittees. It was agreed to keep the subcommittees as they are but to add Committee Chair J. T. Wright to the committee with Committee Members Patrice Marker and Chris Dreska. The subcommittees are as follows:

Committee Members Joyce Natter and Hank Mosler  
Committee Members Bill Matheny, Darryl Cordeiro and Max Scott  
Committee Members J. T. Wright, Patrice Marker and Chris Dreska

Committee Vice Chair Bill Matheny discussed the issues to be assigned.

Issue 3869 – Federal Gov Annuity Form Different than other 1099R Forms – Committee Member Joyce Natter agreed to work this in her subcommittee

Issue 3870 – Tax Year not on all 1099 Forms – it was agreed to put this into the parking lot until further research is done.

Issue 3900 - Schedule H Instructions – it was agree to put this into the parking lot until some of the other issues have been completed.



## **OUTREACH**

Committee Chair J. T. Wright discussed outreach opportunities.

Committee Member Patrice Marker suggested creating a letter for all members to use to send out to various organizations including Congressional Offices. This was discussed. Committee Chair J. T. Wright will prepare a boiler plate letter for review by the committee.

DFO Carolyn Lewis reminded members they should be working with the local taxpayer advocate and that the LTA visits congressional offices. The members are welcome to attend with the LTAs. Also, members could contact the Low Income Tax Clinics. They may have seen some problems. She will send the LITC information to members.

Committee Chair J. T. Wright suggests a news article be written either monthly or quarterly. It would have the local member's name on it and contain success stories or stories of interest.

## **NATIONAL OFFICE REPORT**

TAP Director Bernie Coston talked about the Town Hall Meeting in Cranston, RI. There were over 100 people who attended and the TAP got 15 issues from the meeting. The next Town Hall Meeting is scheduled for June 6th in Cincinnati, OH. The Fargo, ND was held 3 weeks ago and there were between 40-50 people attending. The meetings are getting good support from National Taxpayer Advocate Nina Olson. These Town Hall Meetings will continue.

The TAP will not participate in the NationWide Tax Forums. The TAP was not getting many issues from them.

The Joint Committee will be discussing lessons learned along with timetables for the Town Hall Meetings. It appears that hosting in a town where a TAP member's lives were the highest attended meetings.

TAP Director Bernie Coston discussed the recruitment. The recruitment period ended the last week in May. There were 755 applications input online. That does not include the fax or paper applications. That would be a possible 800 applicants for 28 slots. Members will be used for interviewing.

He does not want to see "down time" during October, November and December before new members come into the committee. He would encourage subcommittee work.

Committee Chair J. T. Wright feels the Annual Meeting should be held in October and that the alternates should be available to move into the vacancies.

Committee Member Max Scott questioned the dates of the appointments. TAP Director Bernie Coston stated that Treasury does the appointments and he does the expirations.

Committee Member Bill Matheny asked about the elevated issues that we have not received responses. TAP Director Bernie Coston said to roll up the information and he will check on them.

Committee Member Matheny gave him the roll-up. TAP Director Coston said he is meeting with Sue Sottile from W & I and Frank Spiegelberg from SB/SE.

Committee Member Bill Matheny asked if he can speed up the travel reimbursement. TAP Director Bernie Coston stated that there are roadblocks. He is continuing to look into it. He discussed the IRS travel system.



TAP Director Bernie Coston said they were looking for a replacement for DFO Carolyn Lewis. He would like to bring someone on before she leaves to "shadow" her.

TAP Director Bernie Coston opened up the floor for comments.

Committee Member Max Scott said he hopes the Annual Meeting will not be the same as last year. Orientation needs more time to explain what TAP is about. Also, the committee meeting need to be longer.

Committee Member Joyce Natter said that to figure the face-to-face meeting, everyone should be told to bring their personal calendars.

Committee Member Bill Matheny said that information should be sent out so member know what they are going to do during the meetings.

DFO Carolyn Lewis said Area Meetings need to be scheduled first so that their face-to-face meeting can be scheduled before the Issue Committee Meetings.

Committee Chair J. T. Wright said the Annual Meeting information doesn't hit members until the face-to-face meeting. He said the TAPSpeak presentation was very helpful and would like to suggest using a live demonstration during the Annual Meeting.

Committee Member Max Scott said the first 30 minutes of the Area and Issue Committee Meetings at the Annual Meeting should be orientation for new members.

Committee Chair J. T. Wright suggests using returning members to make presentation at the Annual Meeting.

Committee Member Darryl Cordeiro suggests giving better information on committees especially the issue committees during the interview process. TAP Director discussed the interview process.

Committee Chair J. T. Wright requested information on the meeting with the Commissioner. TAP Director Bernie Coston explained that members of the Joint Committee met with the Commissioner. The Commissioner was presented with the Annual Report. He was confused about the Annual Report. They explained the Annual Report. They asked what TAP can do in the future. He talked about the "hot issues".

One is the Regulation 7216, the use of taxpayer information being sold to 3rd parties. He would like a position paper from the TAP on this. Joint Committee Member Sonny Kasturi was assigned this issue.

Another issue was the VITA program. What can VITA do if TAC services go away? Could VITA take additional responsibilities? He would like a position paper from the TAP on this. Area 4 was assigned this issue.

He discussed the Return Preparers. This issue is assigned to Ad Hoc. Private Collection Agencies is on hold because of questions on one of the selected companies

The availability of Free File was discussed and this issue is assigned to Area 5.

The Commissioner has agreed to continue with these meetings. TAP Director Bernie will make sure the Commission's executive is briefed before meeting so she can brief the Commissioner.



**OUTREACH (continued)**

Committee Chair J. T. Wright will put something together for the news articles that were discussed earlier.

**SUBCOMMITTEE BREAKOUT**

Subcommittees broke out into individual meetings to discuss and plan their proposals.

Meeting was adjourned.

**May 13, 2006**

**Members in Attendance:**

- Darryl Cordeiro, Mobile, AL
- Christopher Dreska, Smyrna, GA
- Patrice Marker, Davie, FL
- Bill Matheny, Long Beach, MS
- Joyce Natter, Miami, FL
- Max Scott, Baton Rouge, LA
- J. T. Wright, Carrollton, GA

**Staff:**

- Carolyn Lewis, DFO
- Sallie Chavez, TAP Program Analyst
- Nancy Ferree, TAP Program Manager

**Guests:**

- None

**REPORT OF SUBCOMMITTEES**

Committee Member Bill Matheny started by reporting on his subcommittees issues:

Issue 218 – Check-box Authority – a survey has been prepared and the subcommittee will conduct the survey at the Atlanta Tax Forum (TAP Director has given permission for the committee members to participate since they have a purpose). This will stay in the parking lot until after the survey has been taken.

Issue 3537 – Refund to Create Savings Account – Refund splitting has been done. They would like to see the research to make sure this is actually going to happen. They want to wait on the issue of creating savings accounts. They want to conduct a survey with the LITCs and ask the clinics:

1. Do you have a bank account?
2. If not, do you have a problem cashing checks?
3. Is there anything the government can do to help?

DFO Carolyn Lewis said they may not be able to do this survey with the LITCs. TAP Program Manager Nancy Ferree said they may be able to do it with the originator of the issue. There was some



discussion about the 3rd questions. Change it to how do you cash your check? DFO Lewis will check on the LITCs and TAP Program Manger Ferree will check with the issue originator.

New Issue – Changing Third Party Authorization Term (to be added to database) – committee wants to propose expanding the authorization to 1 year from the due date as extended instead of 1 year from due date. They will use the same proposal as the recommendation from TAP 04-054 (Area 3 issue #769). Committee approved completing this proposal.

Committee Member Joyce Natter reported on her subcommittee’s issue.

Issue 3869 – Fed Gov Annuity Form Different than other 1099R Forms – Committee Member Joyce Natter discussed this issue with subcommittee member Hank Mosler (who was not able to attend meeting) by telephone. They want TAP Program Analyst Sallie Chavez to get information on why OPM is using a different form.

Committee Member Chris Dreska reported on one of his subcommittee issues.

Issue 3604 – Change Correspondence from English to Spanish – Spanish notices only go to taxpayer in Puerto Rico. The subcommittee would like to expand this to request all notices be translated into Spanish and be sent to taxpayer who request Spanish notices. This could be done if a taxpayer files a Spanish tax return. It is not known what forms are available in Spanish. Taxpayer’s whose primary language is not English may ignore correspondence because they don’t understand the language. TAP Program Analyst Sallie Chavez will research the forms that are available in Spanish.

Committee Member Patrice Marker report on the other subcommittee issue.

Issue 3671 – SSN not matching hyphenated last names – the subcommittee found that it is not just hyphenated names but multiple last names with the electronic filing. If taxpayer’s can’t file electronically because of the rejects they get because of their names, they file paper. IRS gets names from Social Security. There is no guidance in the Publication 17. There is guidance in the Internal Revenue Manual. IRS wants to encourage taxpayer to file electronically. The committee would like to add to the guidance in the publications and ask IRS to change name management program to ensure proper filing. TAP Program Analyst will check with ETAC and see if this is a problem and see if this is being worked.

Committee Member Bill Matheny wanted to address one issue in the parking lot.

Issue 3759 – E filing Procedures – He discussed the various problems and found that the person who wrote in the issue could have filed through a program such as Turbo Tax. Although it is true that IRS should have publications available, a person should start early enough not to have a problem. It was agreed, by consensus, to drop this issue.

### **TOWN HALL MEETING**

TAP Member Bill Matheny asked if there were any issues that came out of the Town Hall Meeting after everyone has read the notes. He thinks that the comments about it being a long distance to nearest office and having the libraries to help when TAC isn’t close maybe issues that could be worked by the TAC issue committee.

There was not much discussion. Committee Chair J. T. Wright suggested to go onto TAPSpeak one week before the meeting (June 13) and post any issues from this Town Hall Meeting.

Committee Chair J. T. Wright suggests committee member have local Town Hall Meetings in their community.





Committee Member Bill Matheny wondered if TAP could do a little presentation during the TAS presentation during the tax forums. DFO Carolyn Lewis said this years tax forums are set already.

### **GOALS AND OBJECTIVES**

Committee Chair J. T. Wright asked the committee what they want to do with goals and objectives.

Committee Member Max Scott said that outreach goals and objectives but that individuals should set their own goals and how much outreach they should/can do.

Committee Member Patrice Marker suggests turning in outreach reports.

Committee Member Joyce Natter said she doesn't like goals and objectives.

Committee Chair J. T. Wright suggests to have individuals submit individual goals and objectives.

Committee Member Bill Matheny said he doesn't want to get into something that isn't obtainable just to have something written. He would like to see an increase in outreach.

Committee Chair J. T. Wright said to compromise on the proposal. It doesn't have to be a specific number. There could be an option for individuals to submit something in writing. It might be a reminder a member to do it. Individuals will do what they want to and share if they want. Provide outreach activities monthly for every member to respond.

Committee Member Max Scott wants a goal of having a discussion about outreach activities at each meeting.

Committee Member Bill Matheny wants one outreach activity per month. The committee agreed to one outreach activity per month.

### **Round Robin**

Committee Chair J. T. Wright asked if anyone had anything else to add. He said he would start. He would like to see the committee face-to-face meeting be within 2 months of the Annual Meeting.

Committee Member Joyce Natter thanked TAP Program Analyst Sallie Chavez for the TAPSpeak presentation.

Committee Member Chris Dreska said he would like to help with the member interviews.

TAP Program Manager Nancy Ferree said she thought the meeting was very productive. The location was great as were the accommodations.

Committee Member Bill Matheny said this was the best face-to-face meeting he's attended. He commended Committee Chair J. T. Wright on his leadership. It's a great committee. He also commended the staff on doing hard work. He agreed with Committee Chair Wright about the first face-to-face meeting but it might be difficult during tax season with preparers and VITA volunteers.

Committee Member Darryl Cordeiro added that it was a well run meeting. He would like to know about the make-up of the new members. He would like information on the criteria of what we look for in new members.



Committee Member J. T. Wright appreciated all the comments. He felt the committee accomplished a lot. It's a talented group of individuals. He wants to encourage the member to read the TAC Blue Print and provide feedback to Committee Member Bill Matheny.

**CLOSING**

Committee Chair J. T. Wright asked that everyone complete the survey. Next meeting is a conference call on June 20th.

Meeting adjourned.



## **Area 3 Committee Meeting Minutes April 18, 2006**

### **Members in Attendance**

- J T Wright
- Bill Matheny
- Hank Mosler
- Joyce Natter
- Max Scott
- Chris Dreska
- Patrice Marker

### **Members Absent**

- Daryll Cordeiro

### **DFO present**

- Carolyn Lewis

### **Staff in Attendance**

- Nancy Ferree, TAP Program Manager
- Sallie Chavez, TAP Program Analyst

### **Roll Call**

Quorum of five (5) was met.

### **Review of Joint Committee Call**

Committee Chair J T Wright stated he sent out an email this morning with the notes on what the members of the Joint Committee will discuss with the Commissioner when they meet with him on April 20th. He wanted the members to have a copy of this "agenda". Committee Member Joyce Natter stated there were several recommendations still pending from several years ago. She wanted to know how these were being handled. TAP Program Manager Nancy Ferree stated that TAP Director Bernie Coston along with Joint Committee Analyst Barbara Toy handled this. Committee Chair Wright will discuss this with TAP Program Manager Ferree and TAP Program Analyst Sallie Chavez later this week.

### **Review of the Town Hall Meeting**

Committee Member Bill Matheny thanked everyone for his or her involvement in the Town Hall. He stated there were approximately 30 attendees at the meeting, which included TAP employees, TAS employees, IRS employees, practitioners, LITCs, VITA workers, Congressional representatives and a few citizens. TAP Committee Members address the group first telling why they were volunteers. Taxpayer Advocate Nina Olson was the main speaker and directed the forum. Notes on what happened during the Town Hall were email to members this morning and are also posted on TAPSpeak.

Some of the issues discussed were lack of response from the IRS, lack of response from toll-free (automated system) and walk-in sites closing. There was a suggestion that if walk-in sites closed, the IRS should work with the libraries in the area.



There was also a focus group after the presentation. During this time participants spoke about employees not giving name and ID, talking to more than one person about a problem, driving long distances to a walk-in site, the regulation of practitioners and sending information multiple times.

Committee Member Matheny stated the committee got the word out about TAP but was a little disappointed that there was not a larger turnout. He spoke with preparers and was told that it was "crunch time" for them and they did not have the time to attend.

He asked the other TAP member attendees for their input. Committee Member Max Scott said he would have like to have seen more people. The whole idea of TAP is to help people. Committee Member Chris Deska said he thought it was a success and agreed he would have like more people. He said National Taxpayer Advocate Nina Olson handled the program well. He thinks if there is another Town Hall, it should not be so close to filing season. Committee Chair J T Wright also said it was good. He would like to have suggestions on ways to improve attendance. In addition, he would like to suggest time for the committee members to have face time with National Taxpayer Advocate Nina Olson such as a dinner meeting. TAP Program Manger Nancy Ferree stated she appreciated the Congressional attendance.

### **Subcommittee Report**

- *Issue 218 – Check-box Authority*  
Committee Member Bill Matheny stated this was in the parking lot for now. Plans are to have a survey given to practitioner at the NationWide Tax Forum if TAP attends. TAP Program Manger Nancy Ferree stated she still did not know if the TAP would attend this year. DFO Carolyn Lewis stated she was going to be at the Atlanta Forum and she could make sure the surveys were given out there. There is also a Forum in Orlando and we could have someone from TAS make sure they are distributed there as well.
- *Issue 3537 – Refund to Create Savings Account*  
Committee Member Bill Matheny reported he had spoken to Brad Moore who was the previous subcommittee chair on this issue. He received quite a bit of information about the issue. Beatsie Woo from Area 2 is also interested in this issue and would like to work with Area 3 on it. She sent Committee Member Matheny a letter from a former commissioner who is working on the split refund issue. IRS is already working on this and the committee is really more interested now in how a taxpayer can cash checks or get refunds by another means. It was suggested that the area committee work with the VITA issue committee who might also be working a similar issue.

TAP Program Manager Nancy Ferree said she has some information that TAS is developing a financial literacy strategy. She is reviewing this information and will distribute any information she can.

Committee Member Bill Matheny asked if TAP Program Analyst Sallie Chavez had sent out the article about the way this refund issue was handled in San Francisco. She stated she had only sent it to members of the subcommittee. He asked that she send it to the whole committee. It is not available in electronic format so she will send out via mail.

- *Issue 3734 - Downloadable Form 1099-MISC*  
Committee Member Joyce Natter sent out a recommendation on this issue on April 10. The committee only made the recommendation on the Form 1099-MISC. The website states that if the form on the website is used there is a \$50 per form penalty. Using a downloadable Form 1099-MISC is not easy to use for small businesses. They can use the form on the website. By consensus this recommendation was approved.



The recommendation has to go through an edit committee before it is submitted to the Joint Committee. Committee Members Patrice Marker and J T Wright agreed to be this edit committee. They will review the recommendation, make any correction, and send out a corrected recommendation before the face-to-face meeting.

- Issue 3137 – E-Filing – Current Process Discourages  
Committee Member Joyce Natter stated the issue was that it was difficult and costing money to file a paper Form 941. This is not true. It is a simple form that can be done on the website. You can file and pay at the same time. You can't efile on line. IRS has offered this in the past but they have no plans to offer it again in the future. The subcommittee recommends dropping this issue. By consensus this recommendation was dropped.

There was no report on Issue 3604 (Change Correspondence from English to Spanish) or 3671 (Social Security Numbers not marching hyphenated last name). DFO Carolyn Lewis had agreed to get some information to the subcommittee but was unable to obtain the information. She will have this information for the face-to-face meeting.

#### **Face-to-Face Meeting Agenda**

Committee Chair J T Wright presented the DRAFT Agenda for the face-to-face meeting. He and Committee Member Bill Matheny will get together and finalize it before the meeting.

#### **Other Issue**

Committee Member Bill Matheny would like to know if anyone has done anything of interest as far as outreach is concerned. Committee Chair J T Wright said the focus for the last month was on the Town Hall. TAP Program Manger Nancy Ferree said for each member to stay in contact with his or her Local Taxpayer Advocate for outreach activities. DFO Carolyn Lewis stated that Louisiana and Mississippi had extended tax seasons. She will provide TAP Program Manger Ferree with anything of interest for the committee.

TAP recruiting ends on April 28. There are several stated that do not have any applicants or very few. Any help in getting applicants would be appreciated.

#### **Meeting Close**

Next meeting is the face-to-face meeting in Atlanta on May 11 – 13, 2006.

**Approved by consensus of committee on 5/11/2006**



## **Area 3 Committee Meeting Minutes March 21, 2006**

### **Present**

- JT Wright
- Daryll Cordeiro
- William Matheny
- Henry Mosler
- Joyce Natter
- Max Scott
- Chris Dreska

### **DFO present**

- Carolyn Lewis

### **Staff Present**

- Sallie Chavez
- Nancy Ferree

### **Absent**

- Patrice Marker

### **Welcome**

JT Wright welcomed everyone to the call.

### **Roll Call**

Sallie performed a roll call and quorum was achieved.

### **Introduction of Guests**

None

### **Review of Joint Committee Call**

JT will send a report of this call as Bill Matheny sat in on the call. A summary report will be sent to the committee.

### **Town Hall Meeting**

Bill Matheny led a discussion of the upcoming Town Hall Meeting in Jackson, MS. Attendees include Bill Matheny, Chris Dreska, Daryll Cordeiro, JT Wright, and Max Scott. In addition the following staff will attend: Bernie Coston, TAP director, Carolyn Lewis, LTA/DFO, Nancy Ferree, TAP Manager, Analysts Inez De Jesus and Sarah Chavez. Nina E. Olson, NTA will be the featured speaker. Each panel member will speak 2-3 minutes about some aspect of TAP. There will be a podium for speakers. Badges are made for everyone that has RSVP'd. Three congressional offices have responded positively so far. Planning meeting will take place at the hotel lobby from 3:00pm – 3:30pm. JT will speak about the mission of TAP. JT thanked Bill Matheny for all his efforts on this event.



## Review of Issues

Bill Matheny, Joyce Natter and JT Wright screened new incoming issues last week.

#3627- Electronic Filing - no merit at this time- dropped.

#3688 - Requirement imposed under Cir 230 - (disclaimer statement) - research further and consider again. Sallie will send her email out again to everyone.

A suggestion was made for Sallie to add a small explanation in the subject line of emails to help identify what the email is about.

#3691- Form 1098 Instructions- LLC - (non receipt of interest statement for mortgage) - most likely this is not a widespread problem - Carolyn Lewis offered to have her staff do research on this issue. Issue will be moved to next month for consideration. Issue put in parking lot.

#3734 - 1099 electronic filing for small businesses - Joyce suggested combining the 941 electronic filing issue with this issue. Sallie mentioned Area 2 is working on a like issue, and the two issues could be combined. Joyce will work with the Area 2 panel member when Sallie advises who the Area 2 member is.

#3751 - Social Security Worksheet too complicated - Sallie did research and this issue had previously been elevated to IRS. Dropped.

#3759 - E Filing for employees for small business - Carolyn Lewis mentioned there are many requirements for becoming an ERO. Bill will ask for more information from the business owner and this issue will move to next month. Bill requested members read the research report. Pub 1346 is a very large document (1364 pages). This will be put into the parking lot awaiting more information.

#3760 - Non Custodial parent rule change - Carolyn mentioned this issue could be dependent upon many different issues. Some decrees give authority for one parent over the other. This is a legislative issue. Sallie will provide a response when we have the information for whoever provided the issue. This issue is dropped.

## Sub-committee reports

#3137- Assist taxpayers with setting up bank accounts and splitting refunds - Max and Daryll are doing additional research by next month. Daryll questions if this is really a TAP issue. Most checks can be cashed with ID, but large checks are harder to cash. Most places won't cash checks without picture ID. More research will be done and this will be moved to next month.

#218 Checkbox Authority - More research is needed to find out if this concept is working. This will be moved on to next month.

Sallie stated that Patrice has given her some research on several items. Patrice will be back April 6, 2006.

## Face to Face Mtg- Atlanta, GA

Sallie will send more information regarding all the details of this meeting. May 11 - 13, 2006. The meeting will start on Thursday, at 1 p.m. and end on Saturday at 12 noon.

Bill Matheny mentioned that active issues should be done by no later than May 2006 so the issues can be developed for elevating to the Joint Committee. JT and Bill suggest that the committee pick one or two issues and concentrate on them.



JT reminded everyone about outreach.

The meeting was closed.

**Approved by consensus of committee on 5/11/2006**





## **Area 3 Committee Meeting Minutes February 21, 2006**

### **Designated Federal Official**

- Carolyn Lewis, LTA, New Orleans, LA

### **Panel Members Present**

- J T Wright, Carrollton GA
- Bill Matheny, Long Beach MS
- Daryll Cordeiro, Mobile AL
- Chris Dreska, Smyrna, GA
- Patrice Marker, Davie, FL
- Joyce Natter, Miami, FL
- Max Scott, Baton Rouge, LA

### **Panel Members Absent**

- Jose Irizarry, Puerto Rico
- Matthew Henry, Pine Bluff, AR
- Hank Mosler, University Park, FL

### **Staff Present**

- Sallie Chavez, Analyst
- Nancy Ferree, TAP Manager

### **Guests**

- None

### **Review of Joint Cmte Call**

Patrice Marker provided an update of the Joint Cmte conference call.

Items covered include Chair Training in San Diego, CA. Materials are on TAPSPEAK in a chair folder. There is also an editing sub-committee (Quality Assurance) to assure all TAP products are complete and of the best quality.

### **Prior Meeting Notes**

Notes from Dec 6, 2005 and Jan 13, 2006 were approved as submitted.

### **Telephone Protocol**

J T briefly went over the parts of the TAP Member Handbook that addresses good etiquette for teleconferences.

### **Review of Issues**

Bill Matheny led a discussion of the issues assigned to Area 3. Subcommittees have been assigned several issues to look at.



He requested each sub-cmte chair go over the open issues. JT requested Bill send out emails to all members confirming issues. Bill encouraged all members to work the issues between meetings within the sub-committees and bring the decisions to the meetings. Sub-committee conference calls work well to accomplish this.

**Bill Matheny, Daryll Cordeiro, Max Scott reported on**

#3537 - Opening new bank accounts to deposit IRS refunds.

#218 - Check Box on Form 1040 return- Is IRS following procedure? Survey may be given to practitioners to collect data on how prevalent this problem is. Further work will be done to prepare a survey and distribute to practitioners. If problem is found, they will consider what type recommendation to make to IRS (desk procedures, etc)

**Joyce Natter reported on**

#3137 - Electronic filing of 941. Waiting for more information.

#3608 - Net Operating Loss clarity. Citizen claims process is complex. There is a 2004 publication to address this issue. Complexity is due to tax law. Suggested this issue be dropped and send the citizen the publication for 2004 if we have the citizen address. Committee agreed.

**Patrice Marker & Chris Dreska reported on**

#3604 - Unable to switch languages once you start in one language. More research is needed. Sub-cmte will continue to gather more information to

#3671 - SSN's don't match hyphenated names. This has been a problem since electronic filing started. Seems to be a programming problem that no one has worked on before. Social Security may need to be contacted. VITA Issue committee may need to be contacted. Further work with Sallie to be done.

New Issues will go thru screening committee. The screening committee is: Bill Matheny, Joyce Natter, Jose Irizarry and J T Wright.

**Other Issues need determinations also since the committee has not agreed yet by consensus.**

Issue # 3578 - security identity theft issue - recommend drop

Issue # 3596 - Telefile reporting of 941 – recommend drop.

Issue # 3601 - FTD deposit Form 8109 – recommend drop

Issue # 3608 - document trail related to particular case – recommend drop

Issue # 3619 - non profit organization. Penalty - drop as legislative issue

Issue # 3626 - communications regarding current tax year – recommend drop

Issue # 3627 - Improve electronic filing and ease of use - parking lot for future consideration.

Issue # 3686- premature notices on notice of deficiency – recommend drop

Issue # 3553- Filing status requirement (head of household) – recommend drop with acknowledgement letter to citizen.



Consensus was obtained. Bill will send out an email to sub-cmte leads to remind them that a report on the issues they are working, at the next meeting, will be appreciated.

Face to Face Meeting on May 11-13, 2006. Will adjourn by noon on Saturday. Will be held in Atlanta Midtown Marriott Suites. Start at 8am Thursday. Travel day is Wednesday. Meeting room is in the hotel.

### **Closing Remarks**

**Slogan** - The entire group agreed to not have a slogan.

**Outreach** - J T asked that everyone learn more about outreach, and to try and perform effective outreaches. He recommended anyone who needs assistance or information about outreach should call veteran members for assistance.

### **Town Hall Meeting Jackson MS March 23, 2006**

Bill Matheny talked about the next town hall meeting to be held in Jackson MS. The following members will participate: Bill Matheny, J T Wright, Max Scott, Chris Dreska and Daryll Cordeiro. LTA/DFO Carolyn Lewis will attend. Daryll mentioned the reporter for his local newspaper wants to be kept advised of new events. Bill will send copies of media/publicity documents to announce this event. Bill wrote a letter to his newspaper editor. J T mentioned we should look at major employers from the area to put a notice out to the employees.

Sallie requested that all members please fill out the Speakers Report that is on TAPSPEAK. The form can be downloaded. This is needed for all outreach events.

J T adjourned the meeting and requested everyone either email him or call him with improvements for these meetings.

**Approved by consensus of committee on 5/11/2006**