

## **2011 Meeting Minutes Area 3**

- September 17, 2011
  - August 3, 2011
  - July 6, 2011
  - June 11, 2011
  - May 4, 2011
  - April 6, 2011
  - March 3, 2011
  - February 2, 2011
  - January 10, 2011
- 

### **Taxpayer Advocacy Panel (TAP) Area 3 Committee Meeting Minutes September 7, 2011**

#### **Members in Attendance**

- Randee Head
- Karie Davis-Nozemack
- Gerald (Jerry) Janci
- Michael Kennerty
- Susan Lynn, Chair
- Eboni Moss
- Elizabeth (Liz) Mossad
- Herbert (Herb) Hayes
- Deidre (DeDe) Jackson
- Dianne Turner
- Lina Wongshue
- Marilyn Young

#### **Members Absent**

- Winifred (Winnie) Browne
- Susan DaCorte

#### **Staff in Attendance**

- Rose Browne, TAP Designated Federal Official (DFO)
- Donna Powers, TAP Program Analyst
- Anita Fields, TAP Program Analyst
- Kymberly Hand, TAP Secretary and Note taker

## **Staff Absent**

## **Welcome/Announcements**

Susan welcomed everyone and Nancy opened the meeting, in place of Rose.

## **Roll Call**

Kymberly took roll and quorum was met.

## **Introduction of Guests**

## **Review Meeting Minutes**

The committee approved the August meeting minutes, by consensus, as written.

## **Screening Committee New Issues – Susan Lynn/Eboni Moss/Donna Powers**

**Issue #21095 – TAS not Acting Like Advocates** – Eboni provided a brief description of the issue and stated the recommendation was to drop the issue and refer it to TAS, because it was a TAS management issue and outside the scope of TAP.

**Decision** – the full committee, by consensus, decided to drop the issue and refer it to TAS.

**Issue #21322 – Phone Lines for Case Advocates** – Eboni provided a brief description of the issue and stated the recommendation was to drop the issue and refer it to TAS, because it was a TAS management issue and outside the scope of TAP.

**Decision** – the full committee, by consensus, decided to drop the issue and refer it to TAS.

**Issue #21760 – EITC – IRS Questionnaire for Taxpayers** – Eboni provided a brief description of the issue and stated the recommendation was to drop the issue, because there is a system in place to gather the information.

**Decision** – the full committee, by consensus, decided to drop the issue.

**Issue #21764 – Form 5405** – Eboni provided a brief description of the issue and stated the recommendation was to drop the issue, because the issue is a one time problem and will not be a systemic issue.

**Decision** – the full committee, by consensus, decided to drop the issue.

**Issue #21765 – Banking Options for Practitioners** – Eboni provided a brief description of the issue and stated the recommendation was to drop the issue, because the issue is outside of the scope of TAP.

**Decision** – the full committee, by consensus, decided to drop the issue.

Donna stated the screening committee will continue having meeting through October and at that time, the Joint Committee will take over the process of screening all issues coming into TAP.

**Action Item** – Donna to verify if Area 3 will have an October meeting with Nancy.



**Action Item** – Susan will write up the issues from Orlando Tax Forum and submit to staff for the screening committee.

Susan stated the area still had one issue, Healthcare Insurance Reporting for Subchapter S Self Employed People, outstanding that the IRS has not provided an answer and the issue is on hold. Staff has elevated the issue to Shawn Collins to try to get the feedback from the IRS.

### **IRS Joint Operations – Michael Kennerty**

Michael Kennerty spoke about his trip to the Atlanta Toll Free Monitoring Center, where he was able to speak with several IRS employees and see the control center of where all of the 1-800 numbers are monitored. He said that if any members wanted to know more information, to contact him so he could provide them with the point of contact, if they wanted to visit.

Susan stated if any first or second year TAP members were interested in running for TAP Chair or Vice Chair to put their name in and if they had any questions, to please contact her and she would explain her experiences as being a Chair.

**Vita** – Eboni stated the project was done for the year. Their recommendation was elevated to the IRS.

**Communication** – Randee Head and Dianne Turner stated the committee is continuing to work on the TAP member Handbook.

**SBSE-Practitioner Engagement** – Karie Davis stated the project for one subcommittee was complete. She stated they were waiting on a small project to begin working on to finish out the year. Marilyn Young stated her subcommittee continued to work on a flow chart to outline the audit process from start to finish assisting the taxpayers in understanding visually the process vice the written instructions.

**Tax Forms & Pubs/MLI** – Liz stated the group was actively working on forms. She stated the group is also working on a focus group for the Schedule D, Capital Gains and Loses, and 4562, Depreciation and itemization.

**EITC** – Herb Hayes stated the Library subcommittee had developed a library procedure and a briefing for taxpayers. Lina Wongshue stated the outreach subcommittee was reviewing the outreach publications for EITC to see if there anything that needed to be updated.

**SBSE-Correspondence Exam(Toll Free)** – DeDe Jackson stated both subcommittees had submitted their assigned projects ahead of time and had been assigned a mini project to finish out the year. The group is looking at the Small Business Tax Workshops and how the ability to get started and diversity of the workshops for everyone.



**TAC** – Jerry Janci stated the group is providing their input to Barbara Baldwin who is compiling everything and she will provide the group with a final product for their review in October.

**Notice Improvement** – Michael Kennerty stated the group had been in a holding pattern for the past couple of months and now had teamed up with SBSE Campus Exam with a mini project, which is a focus panel on Fraudulent W-2's and 1099's.

**Adhoc Committee** – DeDe stated all the toll free issues that TAP had received this year were on hold and would probably become a bucket for next year. Eboni stated the group is going through the orientation portion of the Annual Meeting to ensure all information was correct with all the changes within TAP.

### **Outreach/Outreach Brainstorming—Outreach Committee**

Susan stated that if Lina wanted to do an outreach at her local rotary club that Susan would go with her to provide support.

Jerry Janci stated he had received answers to his questions that he had submitted to Tom Walker.

Tom stated taxpayers would receive notification that their issue had been received, but TAP would not provide the final feedback to the taxpayer upon resolution.

Jerry stated he also asked about outreach travel expense. He stated Tom's answer was to request reimbursement and make a case for why the panel member should attend the outreach event and the staff would consider the request.

Eboni stated that with the refocus of TAP, outreach events and opportunities would come directly from their Local Taxpayer Advocate for their state. She stated they should contact the panel member or vice versa to find out availability and events that the member could attend.

Eboni and DeDe provided a couple of suggestions of contacting the alumni groups that members are a part of to provide a brief article in the newsletter or trying to give a brief presentation at a football game while talking to people around you.

### **Citizen Input & Meeting Close – Susan Lynn**

Rose closed the meeting.

**Next Meeting is a teleconference on October 6, 2011.**

### **Certification**

The Area 3 Committee approved these minutes, by consensus on October 28, 2011.



**Taxpayer Advocacy Panel (TAP)  
Area 3 Committee  
Meeting Minutes  
August 3, 2011**

**Members in Attendance**

- Winifred (Winnie) Browne
- Karie Davis-Nozemack
- Gerald (Jerry) Janci
- Michael Kennerty
- Susan Lynn, Chair
- Eboni Moss
- Elizabeth (Liz) Mossad
- Herbert (Herb) Hayes
- Deidre (DeDe) Jackson
- Lina Wongshue
- Marilyn Young

**Members Absent**

- Dianne Turner
- Susan DaCorte
- Randee Head

**Staff in Attendance**

- Rose Browne, TAP Designated Federal Official (DFO)
- Nancy Ferree, TAP Program Manager
- Donna Powers, TAP Program Analyst
- Anita Fields, TAP Program Analyst
- Kymberly Hand, TAP Secretary and Note taker
- Shawn Collins, TAP Director
- Steve Berkey, TAP Program Analyst

**Staff Absent**

**Welcome/Announcements**

Susan welcomed everyone and Nancy opened the meeting, in place of Rose.

**Roll Call**

Kymberly took roll and quorum was met.

**Introduction of Guests**

Tom Walker, TAP Chair

John Kim, TAP Vice-Chair

### **Review Meeting Minutes**

The committee approved the July meeting minutes, by consensus, as corrected.

### **Screening Committee New Issues – Susan Lynn/Eboni Moss/Donna Powers**

Eboni stated that the area had been screening the new issues; however, some areas had not been screening their new issues. Therefore, at the JC Face to Face meeting in Seattle, WA, the group sat down and screened the issues according to the new screening process that was developed at the Face to Face meeting. All issues were rescreened according to the new process; each issue was placed into a bucket and placed in the parking lot.

Donna stated the all area committees would continue screening issues until the end of October and at which point the issue would sit in screened status and when the screening committee is selected at the annual meeting, they would review and process further.

Action Item: Nancy to clarify the screening process and notify the group of the proper process.

### **Elevated Issue – Response Received from IRS – Susan Lynn**

Issue #18165 – Revocation or Withdrawal of Form 2848, Power of Attorney and Declaration of Representative – Susan provided a brief background on the issue, stating that the IRS had decided to accept the recommendations to the form.

Susan thanked DeDe Jackson and Michael Kennerty on their assistance with the issue.

### **Joint Committee Discussion – Tom Walker/Eboni Moss**

Tom stated the meeting began with a teleconference call with Nina Olson, National Taxpayer Advocate, where she provided a brief background on her reasoning for wanting TAP to restructure. Tom said Nina has requested that TAP downsize to approximately 75 members to be in line with TAS offices around the country so that each TAP member will have more one on one interaction with the Local Taxpayer Advocate (LTA) and she wanted this to happen over the next two years. He explained that the TAP staff had developed a plan to allow the current members to continue their terms and as they retire to not replace them with new members. He stated at least one panel member who is directly connected with the LTA would represent every state.

He stated that Nina really wanted TAP to become more of the listening post for the taxpayers. She wanted more members on the ground listening and bringing in issues from the taxpayers. Tom stated that Nina is allowing TAP members and staff to develop the refocus and she has confidence in the group to come up with the best possible way to continue getting the work done.

Tom stated that members would continue the project committee approach where members would choose which project they requested the projects they wanted to work on. Each project committee would have an outreach coordinator and it could be the vice chair of the project committee or not. This person of each project committee would be responsible for letting members know about upcoming outreach. The TAP Vice Chair would become the outreach coordinator for all of TAP; this person would be responsible for coordinating outreach, as whole and letting members know when there are outreach events going on. He stated that if anyone had any questions or comments to email one of their staff members or him so they could answer the questions.

Tom stated there would not be areas committees and only project committees would remain. The new screening committee would screen all issues and each project committee would provide one member to be on the screening committee. Tom stated he believes that Nina's push to have TAP refocus is to achieve more effectiveness of TAP and how the issues are presented to the IRS as a complete package instead of individual pieces.

Eboni spoke about her experience at the Joint Committee meeting, stating that the group as a whole decided that this was the way to go and everyone agreed that TAP would be a better way to work. Eboni said the meeting was very good overall and the dialog between members was very productive to the overall success of TAP.

Nancy spoke about the JC Face to Face - how there was a subcommittee put together specifically designated to focus on outreach, how to teach the members how simple outreach is and how to complete the conversation and get the issue from the taxpayer.

### **Tax Forum Recap—Jerry Janci/Susan Lynn**

Jerry spoke about his experience at the Orlando Tax Forum. He said overall the tax forum went well and between two members and one staff, they received about 15 issues. Susan stated how good the tax forum was as an outreach activity and a good place to learn how to talk to taxpayers to get the issues.

### **Outreach/Outreach Brainstorming—Outreach Committee**

Outreach corner not discussed this month.

### **Citizen Input & Meeting Close—Susan Lynn**

Susan announced the election for the TAP Chair and TAP Vice Chair would be coming up soon and if anyone had aspirations of running to start thinking about it and to contact her if they had any questions about what kind of responsibilities it takes to be a Chair or Vice Chair.

Susan stated that third year chairs would not be attending the December Annual meeting. She and Eboni had previously discussed making plans to have a final Area 3 group dinner while in DC. She stated if any members had any suggestions or comments to contact Eboni or herself.



Next Meeting is a teleconference on September 7, 2011.

**Certification**

The Area 3 Committee approved these minutes, by consensus on September 7, 2011.





**Taxpayer Advocacy Panel (TAP)  
Area 3 Committee  
Meeting Minutes  
July 6, 2011**

**Members in Attendance**

- Winifred (Winnie) Browne
- Susan DaCorte
- Randee Head
- Gerald (Jerry) Janci
- Michael Kennerty
- Susan Lynn, Chair
- Eboni Moss
- Dianne Turner

**Members Absent**

- Karie Davis-Nozemack
- Herbert (Herb) Hayes
- Deidre (DeDe) Jackson
- Elizabeth (Liz) Mossad
- Lina Wongshue
- Marilyn Young

**Staff in Attendance**

- Rose Browne, TAP Designated Federal Official (DFO)
- Nancy Ferree, TAP Program Manager
- Marianne Ayala, TAP Program Analyst
- Anita Fields, TAP Program Analyst
- Kymberly Hand, TAP Secretary and Note taker

**Staff Absent**

- Donna Powers, TAP Program Analyst

**Welcome/Announcements**

Susan welcomed everyone and Rose opened the meeting.

**Roll Call**

Kymberly took roll and quorum was met.

**Introduction of Guests**

None

**Review Meeting Minutes**

The committee approved the June meeting minutes, by consensus, as corrected.

### **Joint Committee Discussion—Susan Lynn/Eboni Moss**

Susan announced that Eboni Moss, Vice Chair, would be going to the Joint Committee Face to Face in Seattle, WA. She reviewed the various items that she wanted to discuss with the group so she could ensure that Eboni had all of their responses and their opinions regarding the Joint Committee meeting.

Susan Lynn read the first proposal, which stated providing areas with projects vice allowing members to choose what projects they wanted to work. She asked the group to provide any feedback they had during the meeting.

Several members provided feedback stating they preferred to choose their projects versus being assigned to an area, because with choosing and getting members from all over the country, the project gets a wider variety of opinions and members could go work on a project that they were interested in.

The consensus for Eboni Moss to take to the Joint Committee Meeting would be that most of Area 3 members preferred to choose their project committees.

Susan Lynn began the discussion on the Speak Up TAP Member Refocus survey, asking if everyone had seen the survey. Many members had not seen it, but those who had seen it, had received it from their project committee chair.

The survey contained eight questions about TAP and the feedback would be helpful for the Joint Committee and the Refocus discussion at the Face to Face. Susan suggested those who had not seen the survey to let staff know so they could get the survey out to them.

Many members are very concerned due to the lack of direction the refocus seems to have and thinks the direction of TAP will be more directed towards doing what the IRS wants TAP to do instead of TAP doing more good for the taxpayers. Members are very concerned about the bucket concept, how long the issues will be sitting there without being worked on, how the issues will be distributed between the project committees and issue buckets and who will be working the buckets.

Susan and Eboni both recommended that any member who had any comments or suggestions email Eboni so she could take it to the Joint Committee Face to Face meeting. Eboni said she would send out an email prior to the Joint Committee Meeting with the questions she intended on being answered while she was out there.

### **Project Committee Reports**

**VITA** – Eboni Moss provided a brief update on the VITA project, stating the group is in the process of getting their deliverables together to send to the IRS.

**Communication** – Susan DaCorte provided a brief update on Communications, stating the group did not have a June meeting due to lack of activity, however, they are still working on the Annual Report and the TAP Annual Meeting.



## **SBSE Practitioner Engagement – No Representative**

**TAC** – Jerry Janci provided a brief update on the TAC project, stating the group are finalizing their referrals and should have everything ready for the August completion date.

## **Tax Forms & Pubs/MLI – No Representative**

**EITC** – Marianne Ayala provided a brief update on the EITC project, stating the group is in the progress of finalizing their slide show and is in the process of getting a rough draft done for the program owners. They are hoping to have the slide show ready for the Joint Committee to view at the Face to Face.

**SBSE Toll Free** – Susan Lynn provided a brief update on the SBSE Toll Free project, stating the group are in the process of finalizing their referrals and should be done with the project by August.

**Notice Improvements** – Michael Kennerty provided a brief update on Notice Improvements, stating the groups' analyst is finalizing their referrals that came out of their face to face for the Joint Committee Face to Face for approval.

**AdHoc** – No AdHoc Committees currently.

Randee Head provided a brief description about the National Tax Forum in Atlanta She, along with Steve Berkey and Michael Kennerty attended the tax forum. She enjoyed the experience and was shocked to see the amount of tax practitioners who assist individual taxpayers. She mentioned there was a lot of interest into TAP.

## **Outreach/Outreach Brainstorming – Outreach Committee**

Susan Lynn asked the group to speak about their outreach activities:

Jerry Janci asked what newspapers had been notified about TAP members' selection. Nancy stated that each state had their communication liaison, but recommended that TAP members send out press releases to the different media outlets to announce their appointments.

**Action Item:** Staff to send Winnie Brown some outreach materials.

## **Citizen Input & Meeting Close**

Meeting adjourned.

Next Meeting is a teleconference on August 2, 2011.

## **Certification**

The Area 3 Committee approved these minutes, by consensus on August 2, 2011.



**Taxpayer Advocacy Panel (TAP)  
Area 3 Committee  
Meeting Minutes  
June 1, 2011**

**Members in Attendance**

- Winifred Browne
- Susan DaCorte
- Karie Davis-Nozemack
- Herbert (Herb) Hayes
- Randee Head
- Deidre (DeDe) Jackson
- Gerald (Jerry) Janci
- Michael Kennerty
- Susan Lynn, Chair
- Eboni Moss
- Elizabeth (Liz) Mossad
- Dianne Turner
- Lina Wongshue
- Marilyn Young

**Members Absent**

None

**Staff in Attendance**

- Marianne Ayala, TAP Program Analyst
- Donna Powers, TAP Program Analyst
- Anita Fields, TAP Program Analyst
- Kymberly Hand, TAP Secretary and Note taker

**Staff Absent**

- Rose Browne, TAP Designated Federal Official (DFO)
- Nancy Ferree, TAP Program Manager

**Welcome/Announcements**

Susan welcomed everyone and Donna opened the meeting acting as the DFO.

**Roll Call**

Kymberly took roll and quorum was met.

**Introduction of Guests**

None

### **Review Meeting Minutes**

The committee approved both the April and May meeting minutes, by consensus, as written.

### **Screening Committee Report – Eboni Moss**

**Issue #20305—1099-Instructions—**Eboni provided a brief background on the issue and stated the screening committee recommended placing the issue in the parking lot.

**Decision –** the committee, by consensus, will place the issue in the parking lot

**Issue #20471 – Tax Forms and Pubs – Where to File Address –** Eboni provided a brief background on the issue and stated the screening committee recommended dropping the issue due to the address being on the last page of the instructions.

**Decision –** the committee, by consensus, decided to drop the issue.

**Issue #20472 – Tax Forms and Pubs – Where to File Address –** Eboni provided a brief background on the issue and stated the screening committee recommended placing the issue in the parking lot.

**Decision –** the committee, by consensus, will place the issue in the parking lot.

**Issue #20571 – Tax Forms and Pubs – 1040 Instructions –** Eboni provided a brief background on the issue and stated the screening committee recommended placing the issue in the parking lot

**Decision –** the committee, by consensus, will place the issue in the parking lot.

**Issue #20657 – Tax Forms and Pubs – 1040 Instructions –** Eboni provided a brief background on the issue and stated the screening committee recommended dropping the issue due to the amount of resources the 1040 uses.

**Decision –** the committee, by consensus, decided to drop the issue.

**Issue #20659 – Retirement Account Information Provided by IRS –** Eboni provided a brief background on the issue and stated the screening committee recommended placing the issue in the parking lot.

**Decision –** the committee, by consensus, will place the issue in the parking lot.

**Issue #20815 –Tax Forms and Pubs – Bringing Back AMT Worksheet –** Eboni provided a brief background on the issue and stated the screening committee recommended dropping the issue due to the information being easily found in the instructions and online.

**Decision –** the committee, by consensus, decided to drop the issue.

**Issue #20818 – E-File for Overseas Filers –** Eboni provided a brief background on the issue and stated the screening committee recommended dropping the issue due to possible submitters error while using process.

**Decision –** the committee, by consensus, decided to drop the issue.

### **Issues Elevated to IRS**

**Issue #17723 – Power of Attorney-Delay in Processing of 2848** – the IRS response was rejected due to the IRS already implementing a new process to reduce the wait time.

**Decision** – the committee, by consensus, accepted the IRS rejection.

**Issue #18152 – Filing Petition with Tax Court** – the IRS response was rejected due to the IRS already working on the process.

**Decision** – the committee, by consensus, accepted the IRS rejection.

**Issue #16596 – Erroneous Information from IRS Employees** – the IRS response was rejected due to there being a system in place.

**Decision** – the committee, by consensus, accepted the IRS rejection.

**Issue #16598 – Virtual World Transaction Guidance** – the IRS response was rejected due to the IRS already working on the issue.

**Decision** – the committee, by consensus, accepted the IRS rejection.

### **Project Committee Reports**

**Vita** – Eboni provided a brief report, stating subcommittees for VITA are finalizing their reports to the IRS.

**Communication** – Susan DaCorte provided a brief report, stating project committee worked on annual report and on the refocus of TAP.

**SBSE Practitioner Engagement** – Marilyn provided a brief report, stating project committee worked on several recommendations that are to be submitted to the IRS.

**TAC** – Jerry provided a brief report, stating the project committee reviewed the 40 plus TAC visits, developed subcommittees to review the results.

**Tax Forms & Pubs/MLI** – Liz provided a brief report, stating project committee worked as a focus group to review forms and provided feedback to the IRS.

**EITC** – Herb provided a brief report, stating the project committee worked on and developed two different briefings to train taxpayers on EITC.

**SBSE Toll Free** – DeDe provided a brief report, stating project committee worked on developing new self-help options for the 1-800 toll free phone number.

**Notice Improvements** – Michael provided a brief report, stating the project committee worked to review notices that are ready to be released to the public.

**AdHoc** – DeDe provided a report stating the self-help adhoc committee is on hold until after the Joint Committee meeting.



Susan recommended that panel members try on a regular basis to contact others on the committee to check up on everyone just to ensure that members are doing ok.

### **Outreach**

Susan stated that TAP had been approved to attend the Atlanta and Orlando Tax Forums. Donna stated that Steve Berkey and Michael Kennerty would be attending the Atlanta Tax Forum and if any members wanted to volunteer that were local TAP had travel funds to pay for reimbursement. Rande Head volunteered to attend the Atlanta Tax Forum.

Donna stated that she, Jerry Janci and Susan Lynn would be attending the Orlando Tax Forums.

Marilyn Young recommended for anyone interested in wanting to speak at a college to go to website and get in touch with the Tax Professors to see if they would allow a guest speaker.

Karie also recommended getting in touch with the palisade professors, the career services department and the Low Income Tax Clinic at the college to get a possible speaking arena.

### **Joint Committee Face to Face**

Susan stated Joint Committee Face to Face will be held in Seattle, WA and she announced that Eboni would be attending in her place. She recommended that members think about their feelings about the restructure rather they liked the idea or not, any recommendations for the restructure and email them Eboni and herself so their voices can be heard at the meeting. She stated this subject would be discussed at the next Area 3 meeting.

Marianne requested for any members who could volunteer to help with the TAP Interviews for the selectees during the Recruitment process to send her an email with their available dates and times.

### **Citizen Input & Meeting Close**

Meeting adjourned.

**Next Meeting is a teleconference on July 6, 2011.**

**Certification:** the Area 3 Committee approved these minutes, by consensus, on July 6, 2011.



**Taxpayer Advocacy Panel (TAP)  
Area 3 Committee  
Meeting Minutes  
May 4, 2011**

**Members in Attendance**

- Deidre (DeDe) Jackson
- Gerald (Jerry) Janci
- Susan Lynn, Chair
- Eboni Moss
- Lisa Wongshue
- Marilyn Young (in part)

**Members Absent**

- Winifred Browne
- Susan DaCorte
- Karie Davis-Nozemack
- Luis Fuentes
- Herbert Hayes
- Randee Head
- Michael Kennerty
- Elizabeth Mossad
- Dianne Turner

**Staff in Attendance**

- Rose Browne, Designated Federal Official (DFO) (in part)
- Nancy Ferree, TAP Program Manager
- Donna Powers, TAP Program Analyst
- Anita Fields, TAP Program Analyst
- Kymberly Hand, TAP Secretary and Note taker

**Staff Absent**

None

**Welcome/Announcements**

Susan welcomed everyone. Nancy Ferree opened the meeting.

**Roll Call**

Kymberly took roll and quorum was not met.

**Introduction of Guests**

None

**Review Meeting Minutes**

The committee was unable to approve the April meeting minutes due to no quorum.





## **Subcommittee Reports-Subcommittee Leads**

### **Team 2 – Liz Mossad, Lead, Luis Fuentes, Dianne Turner, Lisa Wongshue**

Issue 19305 – Matching up 1040 ES Payments/Taxpayers – Donna provided a brief update on the issue, stating that since IRS does not have a case on the client involved in the issue, it is against regulations to pull information if the person does not have a case. She did say Patty Wagner is going back to Submission Processing to see if they can find examples of the situation.

Susan is concerned that the IRS cannot match up 1040 ES Payments for taxpayers.

### **Eboni Moss**

Issue 16972 – Health Insurance of Deductions for Subchapter S – Eboni provided a brief update, stating that they have not made any further progress on the issue.

### **Screening Committee Report—Eboni Moss**

- Issue #20305 – 1099 Instructions (parking lot) –
- Issue #20471 – Tax Forms & Pubs – Where to File Address (drop)
- Issue #20472 – Tax Forms & Pubs – Where to File Address (parking lot)
- Issue #20571 – Tax Forms & Pubs – 1040 Instructions (parking lot)
- Issue #20657 – Tax Forms & Pubs – 1040 Instructions (drop)
- Issue #20659 – Retirement Account Information Provided by IRS (parking lot)

All issues were moved to the next meeting due to lack of quorum. No decisions were made due to lack of a quorum.

### **Previous Screening Issues**

Issue #19995 – Social Security Numbers – awaiting response from Area 1's IRS recommendation.

Issue #20026 – Tax Forms & Pubs – 1040 Instructions – more research needed on tax laws.

Issue #201210 – System to Track Fraudulent Taxpayers – Drop but forward comments to Director.

All issues were moved to the next meeting due to lack of quorum. No decisions could be made due to lack of a quorum.

### **Issues Elevated to IRS**

Issue #17723 – Power of Attorney-Delay in Processing of 2848 – Rejected

Issue #18152 – Filing Petition with Tax Court – Rejected

Issue #16596 – Erroneous Information from IRS Employees – Rejected

### **Project Committee Reports**

VITA – Eboni and Donna provided a brief update on the project stating the Face to Face was at the end of the month and the review of the project would be done at the Face to Face.

Communication – No member was online to provide update

SBSE Practitioner Engagement – Marilyn provided a brief update and stated that the Face to Face would be held May 23 and 24.

TAC – Jerry stated committee visited 20 to 30 TACs and would discuss the results in their Face to Face.

Tax Forms & Pubs/MLI – No member was online to provide update.

EITC – Lisa Wongshue stated the committee was still working on their outreach packages and would be having their Face to Face soon.

Notice Improvements – No member was online to provide update.

AdHoc – DeDe stated project has been put on hold for the moment.

### **Outreach**

Susan stated there was a discussion between Russ Pool, Donna Powers and herself regarding putting a section on the Area 3 TAPSpace for members to put their outreach activities so other members could use this section to get ideas of ways to do outreach.

She suggested thinking about different business groups and looking in the phone book to find groups to talk to and do outreach.

Several members provided different things they had done for outreach.

### **Citizen Input & Meeting Close**

Meeting adjourned.

Next Meeting is a teleconference on June 1, 2011.

### **Certification**

The Area 3 Committee approved these minutes, by consensus, on June 1, 2011.



**Taxpayer Advocacy Panel (TAP)  
Area 3 Committee  
Meeting Minutes  
April 6, 2011**

**Members in Attendance**

- Winifred Browne
- Susan DaCorte (in part)
- Karie Davis-Nozemack
- Herbert (Herb) Hayes
- Randee Head (in part)
- Diedre (Dee Dee) Jackson
- Gerald (Jerry) Janci
- Michael Kennerty
- Susan Lynn, Chair
- Eboni Moss, Vice Chair
- Elizabeth (Liz) Mossad
- Dianne Turner
- Lisa Wongshue
- Marilyn Young

**Members Absent**

- Luis Fuentes

**Staff in Attendance**

- Rose Browne, Designated Federal Official (DFO)
- Nancy Ferree, TAP Program Manager
- Donna Powers, TAP Program Analyst
- Anita Fields, TAP Program Analyst
- Kymberly Hand, TAP Secretary and Note taker

**Staff Absent**

None

**Welcome/Announcements**

Susan welcomed everyone. Nancy Ferree opened the meeting.

**Roll Call**

Kymberly took roll and quorum was met.

**Introductions of Guests**

Tom Walker, TAP Chair

Shawn Collins, TAP Director

Steve Berkey, TAP Senior Program Analyst



### **TAP Restructure – Tom Walker, Shawn Collins, Steve Berkey**

Shawn thanked the committee for all the hard work they have been doing thus far and assured the members that the changes to TAP will be discussed and they would have a say in how the restructure is done.

Tom Walker provided his perspective on the proposed restructure of TAP and answered any questions the committee had. He provided the background on the restructure and stated that all concerns and thoughts needed to be heard so that all things could be addressed. He explained that outreach would become a major part of the area responsibility.

Dee Dee suggested creating a structured format for reporting issues.

Susan provided information on Area 3's outreach committee and suggested to the members to think about the restructure and make comments.

### **Review Meeting Minutes**

The committee approved the meeting minutes from March, by consensus.

### **Subcommittee Reports-Subcommittee Leads**

#### **Team 2 – Liz Mossad, Lead, Luis Fuentes, Dianne Turner, Lisa Wongshue**

Issue 19305—Matching up 1040 ES Payments/Taxpayers—Liz provided a brief description of the issue, stating the subcommittee has reviewed the feedback received from the SME and they are researching if the payments have to be matched manually.

#### **Team 3 – Randee Head, Lead, Diedre Jackson, Jerry Janci, Marilyn Young**

Issue 19103 – Currently Not Collectible Status – Donna provided a brief description of the issue, stating the subcommittee has received additional information from the submitter and recommend the issue be dropped because taxpayer can go and check their status online.

Decision – the full committee, by consensus, decided to drop the issue due to being updated by the IRS.

Donna stated that staff's goal was to get all active issues either forwarded for elevation or dropped.

#### **Eboni Moss**

Issue 16972 – Health Insurance of Deductions for Subchapter S – Eboni provided a brief description of the issue, stating the subcommittee is still waiting to hear back from the SME.

Action Item: Donna to contact SME to follow up on additional information.

### **Issues to be Elevated**

Issue 18165 – Withdrawal of POA – Susan provided a brief background on the issue, stating the issue would be elevated to the JC.

Decision – the full committee, by consensus, decided to elevate the issue.

### **Screening Committee Report – Eboni Moss**

Issue 19993 – Tax Forms & Pubs in PDF Format – Eboni provided a brief description of the issue, recommending the issue be dropped, because there are plenty of ways to contact the IRS via website.

Decision – the full committee, by consensus, decided to drop the issue.

Issue 19994 – E-File Should be Free – Eboni provided a brief description of the issue, recommending the issue be dropped, because the individual vendors set the amount not the IRS.

Decision – the full committee, by consensus, decided to drop the issue.

Issue 19995 – Social Security Numbers on IRS Materials – Eboni provided a brief description of the issue, recommending the issue be placed in the parking lot to monitor.

Decision – the full committee, by consensus, decided to place issue in parking lot to monitor.

Issue 20026 – Tax Forms & Pubs – 1040 Instructions – Eboni provided a brief description of the issue, recommending the issue be placed in the parking lot for more research.

Issue 20027 – Tax Forms & Pubs – Eliminate 1040A/1040EZ – Eboni provided a brief description of the issue, recommending the issue be dropped due to the hardship it would cause to taxpayers.

Decision – the full committee, by consensus, decided to drop the issue.

Issue 20094 – Collection Process-Refunds & Student Loans – Eboni provided a brief description of the issue, recommending the issue be dropped due legislative issue.

Decision – the full committee, by consensus, decided to drop the issue.

Issue 20121 – System to Track Fraud – Eboni provided a brief description of the issue, recommending the issue be placed in the parking lot for more research.

Decision – the full committee, by consensus, decided to place the issue in the parking lot to gather further research.



Issue 20123 – Use Logarithms or Formulas – Eboni provided a brief description of the issue, recommending the issue be dropped due to every taxpayers return being different.

Decision – the full committee, by consensus, decided to drop the issue.

Issue 20124 – Change Forms to Use Two SSN's – Eboni provided a brief description of the issue, recommend working the issue.

Issue 20212 – Form 1099 – Eboni provided a brief description of the issue, recommending the issue be dropped due to the issue being non-systemic.

Decision – the full committee, by consensus, decided to drop the issue.

### **Outreach/Outreach Brainstorming – Susan Lynn**

Susan requested the committee to think about how to make outreach better so that everyone comments can be addressed and discussed in the May meeting.

Susan explained the results of the questionnaire that was sent to members with a one day turn around. She reviewed the answers to all questions. She explained the purpose of the questionnaire was to see what members were experiencing concerning outreach. The questionnaire provided different suggestions on how Area 3 could be better about getting outreach done.

Anita requested all members turn in their outreach every month or every other month instead of waiting to the end of the year.

### **Action Item**

Anita will email the committee members the outreach request form.

Donna announced the two Tax Forums and mentioned that only one member and one staff would be attending the tax forum this year. She also mentioned panel members that lived close to the tax forums sites that did not require a hotel were preferred due to the costs associated with sending members to the tax forums.

### **Citizen Input & Meeting Close**

Meeting adjourned.

Next Meeting is a teleconference on May 7, 2011.

### **Certification**

The Area 3 Committee approved these minutes, by consensus on June 1, 2011.



**Taxpayer Advocacy Panel (TAP)  
Area 3 Committee  
Meeting Minutes  
March 3, 2011**

**Members in Attendance**

Winifred Browne  
Susan DaCorte  
Karie Davis-Nozemack  
Luis Fuentes  
Herbert (Herb) Hayes  
Randee Head  
Diedre (Dee Dee) Jackson  
Gerald (Jerry) Janci  
Michael Kennerty  
Susan Lynn, Chair  
Ebony Moss, Vice Chair  
Elizabeth (Liz) Mossad  
Dianne Turner  
Marilyn Young

**Members Absent**

Lisa Wongshue

**Staff in Attendance**

Rose Browne, Designated Federal Official (DFO)  
Nancy Ferree, TAP Program Manager  
Donna Powers, TAP Program Analyst  
Kymberly Hand, TAP Secretary and Note taker

**Staff Absent**

Anita Fields, TAP Program Analyst

**Welcome/Announcements**

Susan welcomed everyone and reminded everyone to identify him or herself when speaking. Susan stated she and Donna would be assigning new issues after the call and that if any Teams need an issue to send an email.

**Roll Call**

Kymberly took roll and quorum was met.

**Introductions of Guests**

None

## **Review Meeting Minutes**

The committee approved the meeting minutes from February, by consensus.

## **Subcommittee Reports-Subcommittee Leads**

### **Team 1—Karie Davis-Nozemack (lead)**

**Issue 18916—Preparer Number Database**—Karie stated the subcommittee needed to regroup and continue working on the issue, due to the subcommittee not meeting last month. Karie stated the team is not ready for a new issue.

### **Team 2—Liz Mossad (lead)**

**Issue 19305—Matching up 1040 ES Payments/Taxpayers**—Liz stated the subcommittee met and developed a plan of action together, however they were waiting for specific questions to be answered and then would adjust referral if needed.

**Issue 18920—Language Barrier/Accent**—Liz provided a brief description of the issue, research was done and other areas have elevated several issues regarding the issue and recommended dropping the issue.

**Decision**—the full committee, by consensus, decided to drop the issue, due the issue being outside the scope of TAP.

Donna stated the issue could possibly show discrimination against employees and that would be outside the scope of TAP.

**Action Item**—Liz and Donna to set up next team meeting.

### **Team 3—Randee Head (lead)**

**Issue #17261—Over 65 Automatic Figures for Deduction on 1040**—Randee provided a brief description of the issue, stating this was a individual issue and non-systemic and recommended dropping the issue.

**Decision**—the full committee, by consensus, decided to drop the issue, due to it being non-systemic.

**Issue #19103—Currently Not Collectible Status**—Randee stated the team would be researching the issue further and would be working it on their next call.

Donna stated she contacted the submitter and he stated this was an on-going problem with LITC taxpayers.

**Action Item**—Randee and Donna to set up next team meeting.

**Action Item**—Staff to assign new issues to Team 2 and Team 3.

**Issue #16972—Health Insurance of Deductions for Subchapter S—Eboni Moss**—Eboni stated the team has a phone conference with the Subject Matter Expert (SME) and depending on the response from the SME the team would be writing the referral.



**Issue #17723—Power of Attorney Delay in Processing—Karie Davis-Nozemack—**

Donna explained this issue was mistakenly put on the agenda. Karie stated the issue was approved by the Joint Committee and was with the IRS.

**Issue #18165—Withdrawal of POA—Susan Lynn—**Susan stated the revised copy of the referral was being reviewed by Dee Dee. The issue would be forwarded to the Quality Review through Winnie and team.

**Issue #18935—Recordation of Calls—Liz Mossad—**Liz stated they had received more information and has forwarded the information to the manager of the Joint Operations Center for review for accuracy.

**Screening Committee Report—Eboni Moss**

**Issue #19662—Emailing of Forms—**Eboni described the issue and stated the recommendation of the screening committee was to drop the issue, due to the issue creating the risk of identity theft .

**Decision—**the full committee, by consensus, decided to drop the issue.

**Issue #19866—Forms & Pubs Putting Mailing Address on Form 8379, Innocent Spouse Allocation—**the screening committee recommends working this issue and will be assigned to one of the subcommittees.

**Issue #19879—EFTPS—Taxpayers Having the Ability to Edit Payments—**the screening committee will place the issue in the parking lot pending more research.

**Issue #19880—Electronic Spreadsheet 1040 Form & Schedules—**Eboni described the issue and stated the recommendation of the screening committee was to drop the issue, due to the large quantity of available resources online to e-file.

**Decision—**the full committee, by consensus, decided to drop the issue.

**Issue #19881—Place a Time Stamp on Electronic Forms—**Eboni described the issue and stated the recommendation of the screening committee was to drop the issue, due to there being plenty of information on the form itself to tell what tax year the form is for.

**Decision—**the full committee, by consensus, decided to drop the issue.

**Issue #19942—Notice CP-136 Improvement—** the screening committee recommends working this issue and will be assigned to one of the subcommittees.

**Elevated Issues Information—Susan Lynn/Donna Powers**

**Issue #16595—Instruction for Change of Business Name—**Susan describes the response from the IRS and suggested accepting the rejection by the IRS due to the publication already existing within the IRS.

**Decision—**the full committee, by consensus, decided to accept the rejection by the IRS.

Susan noted that staff was in the process of trying to find better process to gather the most up to date information and have access to what the IRS is in the process of revising. This would result in less issues being rejected by the IRS after an issue has been submitted.

Members commented on some of the issues they are working on in their project committees that might be useful for some of the issues the Area is working.

### **Project Committee Reports**

**VITA**—Eboni Moss reported VITA was split into two subcommittees and gathering research on the different types of participants of VITA.

**Communication**—Susan DaCorte reported Communications have been evaluating the surveys from the annual meeting, completing work on the bio-books and finishing the letters to the Senators. She stated there are two Senators pages with the TAP logo on it.

**SBSE-Practitioner Engagement**—Marilyn Young reported the Correspondence Exam taskforce presented the white paper to the JC and it was elevated to the IRS and the group was broken into two different subcommittees.

**Tax Forms & Pubs/MLI**—Luis Fuentes reported the committee is making progress and he is researching several issues dealing with language barriers.

**EITC**—Herb Hayes reported EITC would maintain the three levels of presentations and create new levels as needed.

**SBSE-Correspondence Exam**—Dee Dee Jackson reported Correspondence Exam has taken the top four most frequent problems, testing them, compiling the information and preparing to write the issue.

**TAC**—Jerry Janci reported the TAC committee members are visiting TAC centers and hoping to improve forms distribution at the TAC center.

**Notice Improvement**—Michael Kennerty reported having an eighteen-month turning point on project and adding the notice on the landing page on the IRS website. When a taxpayer receives a notice, they can go to the website and find out information about the notice.

### **Outreach/Outreach Brainstorming—Susan Lynn**

Susan stated a committee was developed, consisting of Herb, Jerry and herself, to discuss what can be done to improve outreach and how members can get in contact with local IRS employees to get involved with different activities. They have not had their first teleconference so if any members have any suggestions, they can email one of the three members with any recommendations.

**Action Item**—Members who have any outreach ideas to email Susan.

Nancy mentioned the IRS Open House Day and if anyone is interested, she will contact the manager and get the members name on the visitor list.

Donna mentioned she is gathering the Local Taxpayers Advocates (LTA) list of the different outreach events that the LTA's are doing and she would let the members know what is going on so if they are close they can attend and be associated with the LTA.



Michael Kennerty spoke about his experience at a LITC. He said he had gone to two of the three in Georgia. He said it was a great experience and recommended everyone to see if there was one close by for the members to visit.

Herb requested to know if staff could make contact with the Center on Budget & Policy Priorities to find out more information about their outreach sessions. He said they are hiring speakers to travel around and give speeches.

**Action Item**—Donna to find out more information regarding Center on Budget & Policy Priorities

Liz Mossad requested to allow members who volunteer for different things to be able to speak during the meeting to pass along their experiences and any information that needed to be passed.

**Action Item**—Donna to add an agenda item on the next meetings agenda.

**Citizen Input & Meeting Close**

Meeting adjourned.

**Next Meeting is a teleconference on April 7, 2011.**

**Certification: the Area 3 Committee approved these minutes, by consensus, on April 7, 2011.**



**Taxpayer Advocacy Panel (TAP)  
Area 3 Committee  
Meeting Minutes  
February 2, 2011**

**Members in Attendance**

Susan DaCorte  
Karie Davis-Nozemack  
Luis Fuentes  
Herbert Hayes  
Diedre (Dee Dee) Jackson  
Gerald (Jerry) Janci  
Michael Kennerty  
Susan Lynn  
Eboni Moss  
Elizabeth (Liz) Mossad  
Dianne Turner  
Lina Wongshue

**Members Absent**

Winifred (Winnie) Browne  
Ranee Head  
Marilyn Young

**Staff in Attendance**

Donna Powers, TAP Program Analyst, Acting Designated Federal Official  
Nancy Ferree, TAP Program Manager  
Kymberly Hand, TAP Secretary and Note taker

**Staff Absent**

Rose Browne, Designated Federal Official

**Welcome/Announcements**

Susan welcomed everyone and reminded everyone to identify him or herself when speaking. She welcomed the guests and stated they would have a chance to speak at the end of the meeting.

**Roll Call**

Quorum was met.

**Introductions of Guest—**

Paula Johnson—Treasury Inspector General for Tax Administration (TIGTA)  
Debra Smallwood—Treasury Inspector General for Tax Administration (TIGTA)

**Review Meeting Minutes**

The committee approved the meeting minutes from January by consensus.

## **Subcommittee Reports-Subcommittee Leads**

### **Team 1—Karie Davis-Nozemack (lead)**

#### **Issue 18906—Lack of Closed 401 K Information Provide by IR**

Karie stated Herb Hayes and Michael Kennerty researched the issue and found that there are several publications, which provided information on 401K issue and the teams' recommendation is to drop the issue.

**Decision**—the full committee, by consensus, decided to drop the issue due to adequate information already provided by the IRS.

#### **Issue 18907—IRS Should Provide Information on Self Directed IRA**

Karie stated Winnie and herself researched the issue and the research indicated that the IRS does not recognize self directed IRA and its only recognized within the marketplace and the teams' recommendation is to drop the issue.

**Decision**—the full committee, by consensus, decided to drop the issue due to this being a non-issue for the IRS.

### **Team 2—Liz Mossad (lead)**

**Issue 18912—IRS Should Provide Publication to Practitioners on Due Diligence**—Liz provided a brief background on the issue, stating the team researched the issue and found several documents regarding the issue. The teams' recommendation is to drop the issue.

**Decision**—the full committee, by consensus, decided to drop the issue due to adequate information already provided by the IRS.

**Issue 18920—Language Barrier/Accent**—Liz provided a brief background on the issue, stating the team researched the issue and have additional questions on procedures for when this occurs and the team is waiting for those answers to come back before making a decision on this issue.

### **Team 3—Ranee Head (lead)**

**Issue 18991—Form 1120—Direct & Indirect Ownership**—Jerry Janci provided a brief background on the issue, stating the team researched the issue and found adequate information on the issue and the teams' recommendation is to drop the issue.

**Decision**—the full committee, by consensus, decided to drop the issue due to adequate information already provided by the IRS.

**Issue 19103—Currently Not Collectible Status**—Jerry provided a brief background on the issue, stating the team researched the issue and have contacted the submitter for more information.

**Issue 16972—Health Insurance of Deductions for Subchapter S**—Eboni Moss—Eboni stated she would schedule a conference call to get everyone together and to get their questions answered by a Subject Matter Expert (SME).

**Issue 17723—Power of Attorney Delay in Processing**—Karie Davis-Nozemack—Karie stated she had provided a revised version of the referral form and it was ready for the Joint Committee.

**Issue 18156—LITC Grants Matching—Dee Dee Jackson—**Dee Dee stated Michael Kennerty researched the issue and found the issue to be legislative. The teams' recommendation is to drop the issue.

**Decision—**the full committee, by consensus, decided to drop the issue due to being legislative and out of the scope of TAP.

**Action Item—**Donna to add the issue to the legislative issues list going up to the IRS as a concern of taxpayers with LITC grant matching.

**Issue 18165—Withdrawal of POA—Susan Lynn—**Susan stated issue was completed and was pending the final revision, then to Area 3 Quality Review and then to Joint Committee.

**Issue 18914—IRS Should Call Back When Disconnected—Dee Dee Jackson—**Dee Dee provided a brief description of the issue, stating Area 4 had a similar issue last year, which was rejected by the IRS and the teams' recommendation is to drop the issue.

**Decision—**the full committee, by consensus, decided to drop the issue due to issue already been addressed.

**Issue 18935—Recordation of Calls—Liz Mossad—**Liz provided a brief description of the issue and the team has submitted some clarifying questions to the director in Accounts Management in Atlanta and has requested a SME to speak to the team.

#### **Issue Status Report—Ebony Moss/Donna Powers**

Ebony stated she and Donna had reviewed the parking lot for issues that needed to be dropped or moved to another status.

Ebony reviewed the following issues:

**Issue 18155—Collection Employees Denying Request to Speak to Manager—**Ebony recommended to drop this issue and be referred to Steve Berkey, Acting TAP Director.

**Decision—**the full committee, by consensus, dropped the issue and will forward to Steve Berkey.

Susan explained to members that the issue was not dropped just referred to a higher source since there was not anything the committee could do with the issue; however, with it being referred to Steve Berkey he would be able to address it further.

**Issue 18333—Applications for Blackberry/Iphone/Android Phones—**Ebony recommended to drop this issue due to IRS already have a system in place for this.

**Decision—**the full committee, by consensus, dropped the issue.

**Issue 18335—Envelope Size—**Ebony recommended to drop this issue due to a previous issue being rejected by the IRS due to lack of resources.

**Decision—**the full committee, by consensus, dropped the issue.

**Issue 18686—Practitioners Priority Service Services Issues—**Ebony recommended to drop this issue and refer it to the TAP Director.

**Decision**—the full committee, by consensus, dropped the issue and will forward to Steve Berkey.

**Issue 18938—Write Off Amounts Owed to IRS under \$10.00**—Eboni recommended this to be dropped due to it being legislative.

**Decision**—the full committee, by consensus, dropped the issue.

**Issue 18939—Working with Taxpayer who work at Hourly Positions**—Eboni recommended this to be dropped due to the inability to suggest changing IRS employees work hours to better serve the taxpayers.

**Decision**—the full committee, by consensus, dropped the issue and will forward to Steve Berkey.

**Issue 18940—Creation of Summary Booklet for Practitioners**—Eboni recommended to drop this issue due to adequate information provided by the IRS.

**Decision**—the full committee, by consensus, dropped the issue.

**Issue 18941—More Toll-Free Lines Needed during Filing Season**—Eboni recommended this issue is transferred to the toll-free phone call analyst Marianne Ayala.

**Decision**—the full committee, by consensus, agreed to transfer the issue.

Donna spoke to the group regarding the TAP staff collecting all of the issues relating to the toll-free line by one person and at the end of the year roll them up into the most reported issues. She reported another issue could be the inability to receive forms from the IRS through the mail.

#### **Screening Committee Report—Eboni Moss**

**Issue 19495—EITC for Estranged Spouse**—Eboni provided a brief background on the issue and recommended the issue to drop the issue due to legislative.

**Decision**—the full committee, by consensus, dropped the issue.

**Issue 19502—IRS RMD as a Charitable Contribution**—Eboni provided a brief background on the issue and recommended the issue to drop the issue due to human error in processing and understanding the contribution.

**Decision**—the full committee, by consensus, dropped the issue.

**Issue 19543—TaxWise Improvement Opportunities Process**—Eboni provided a brief background on the issue and recommended to drop the issue due to the issue already being addressed by Wage and Investment.

**Decision**—the full committee, by consensus, dropped the issue.

**Issue 19616—Toll Free Number—Application for PTIN**—Eboni provided a brief background on the issue and recommended to drop the issue due to resources being available if taxpayers are having issues with PTIN.

**Decision**—the full committee, by consensus, dropped the issue.

**Issue 19621—EFTPS**—Eboni provided a brief background on the issue and recommended to drop the issue due to human error when processing payments.

**Decision**—the full committee, by consensus, dropped the issue.

**Issue 19622—VITA Information on Website**—Eboni provided a brief background on the issue and recommended to drop the issue due to the website only being updated every two weeks and having a disclaimer stating to call phone number for the most current information.

**Decision**—the full committee, by consensus, dropped the issue.

**Issue 19623—IRS.gov website**—Eboni provided a brief background on the issue and recommended to drop the issue due to website already having a place to contact the IRS regarding the website.

**Decision**—the full committee, by consensus, dropped the issue.

**Issue 19626—Return Processing Allow 1040X to be E-filed**—Eboni provided a brief background on the issue and recommended to drop the issue due to the complexity of the 1040X attachments.

**Decision**—the full committee, by consensus, dropped the issue.

**Issue 19629—E-Filing Streamlining**—Eboni provided a brief background on the issue and recommended to work the issue. Susan recommended changing the name from E-Filing to E-Services.

**Decision**—the full committee, by consensus, decided to work the issue and change the name as recommended.

Susan stated the teams would work the following issues:

**Issue 18916—Preparer Number Database**—was issued to Team 1.

**Issue 19305—Matching up 1040 ES Payments/Taxpayers**—was issued to Team 2.

**Issue 17261—Over 65 Automatic Figures for Deduction on 1040**—was issued to Team 3.

Susan explained to the guests that the panel members put a lot of time in researching the issues prior to the full committee dropping the issues. After researching the issue and analyzing the research, the teams decide rather to continue working the issue or to drop it based off what the research shows.

Donna reminded the subcommittees' leads to email her with when the teams will be meeting.

### **Elevated Issues Information—Susan Lynn/Donna Powers**

Donna spoke regarding the elevated issues that had been returned from the IRS as rejected, but the IRS was aware and was implementing the changes, however, TAP did not have a code to state this. So staff went to the Joint Committee for a new status code



for the database and for better contact information for the IRS on who reviewed the referral forms. She is expecting to have a final answer at the next meeting.

Donna reviewed the following responses from the IRS:

**Issue 16596—Erroneous Information from IRS Employee—**IRS rejected the referral. Susan recommended contacting the IRS regarding a statement in the rejection and if the IRS comes back with the answer to the statement, then they will accept the rejection, however if the IRS does not come back with the answer, then they will rebut the rejection.

**Decision—**the full committee, by consensus, decided to wait to see if the IRS will come back and if not then a formal rebuttal will be written.

**Issue 16597—Deceased Taxpayer Information—**IRS rejected the referral. Susan recommended accepting the IRS rejection due to the IRS statement of not having the work force to do the suggestion that the area recommended.

**Decision—**the full committee, by consensus, accepted the rejection.

**Issue 17722—Release of Federal Tax Lien—**IRS responded with under consideration with a follow up date of April 30, 2011. Susan recommended accepting the response.

**Decision—**the full committee, by consensus, accepted the response from the IRS and will follow up on the given date.

**Issue 17957—No Notice of Explanation with IRS Checks—**IRS rejected the referral.

Susan recommended accepting the rejection with a possible code change if approved by the Joint Committee.

**Decision—**the full committee, by consensus, accepted the rejection and will monitor for the code change.

**Issue 18151—Notice of Deficiency—**IRS rejected the referral. Susan recommended accepting the rejection with a possible code change if approved by the Joint Committee.

**Decision—**the full committee, by consensus, accepted the rejection and will monitor for the code.

**Issue 18152—Filing Petition with Tax Court—**IRS rejected the referral. Susan recommended responding back to the IRS with some additional questions and if not satisfied rebut the rejection. Karie will assist with the writing of the rebuttal.

**Decision—**the full committee, by consensus, will contact the IRS point of contact for rejection and ask additional questions and if necessary will write a rebuttal.

**Issue 18153—CAF Number Errors-Telephone Does Not Get Answered—**IRS accepted the referral with an implantation date of January 2012 and Susan recommended accepting the response.

**Decision—**the full committee, by consensus, accepted the response with a follow up in January 2012 to see implantation.



### **Citizen Input**

None

### **Member Comments**

Eboni reminded the committee to submit outreach instead of holding onto it.

Susan spoke to the committee about how important it is to turn in their outreach on a monthly basis instead of holding onto it. She reminded the members to turn in their outreach for January and December if they have not done so.

### **Action Item**

Donna stated she would update the database and send everyone a new issue report.

Susan announced the volunteers who had said they would assist with the special project that TAP had been presented with by Wage and Investment. The primary volunteers are Randee Head, Liz Mossad and Michael Kennerty. The alternate volunteers are Susan Lynn, Marilyn Young and Dee Dee Jackson.

Donna updated the committee of the face-to-face dates of June 17<sup>th</sup> and 18<sup>th</sup> and the location had not been decided yet.

### **Meeting Close**

Nancy closed the meeting.

**Next Meeting is a teleconference on March 2, 2011.**

**Certification: the Area 3 Committee approved these minutes, by consensus, on March 2, 2011.**



**Taxpayer Advocacy Panel (TAP)  
Area 3 Committee  
Meeting Minutes  
January 10, 2011**

**Members in Attendance**

Winifred Browne  
Susan DaCorte  
Ranee Head  
Jerry Janci  
Michael Kennerty  
Susan Lynn  
Eboni Moss  
Elizabeth Mossad  
Dianne Turner  
Lisa Wongshue  
Marilyn Young

**Members Absent**

Karie Davis-Nozemack  
Luis Fuentes  
Herbert Hayes  
DeeDee Jackson

**Staff in Attendance**

Anita Fields, TAP Analyst & note taker  
Donna Powers, TAP Program Analyst  
Nancy Ferree, TAP Program Manager  
Rose Browne, DFO

**Welcome/Announcements**

Susan Lynn opened the meeting and welcomed everyone to the first meeting of the year.  
Rose Browne also welcomed everyone to the meeting.

**Roll Call**

Quorum was met.

**Introductions of Guests**

None

**Review Meeting Minutes**

The committee approved the meeting minutes from December by consensus.

### **Recap of the Annual Meeting**

Lynn went over all subcommittees from the Annual Meetings to ensure that they were captured correctly. Lynn said if you feel that you signed up for a committee that you don't want to be a part of or feel that you can't keep up, just let her or Donna know.

Team 1- Karie Davis-Nozemack is the lead, with Winnie Browne, Herb Hayes and Michael Kennerty.

Team 2- Liz Mossad is the lead, with Luis Fuentes, Dianne Turner, and Lisa Wongshue.

Team 3-Randee Head is the lead, with DeeDee Jackson, Jerry Janci, and Marilyn Young.

Team assistants are Lynn, Susan DaCorte and Eboni Moss.

All subcommittee calls will be the 2<sup>nd</sup> Wednesday of every month.

The Team Leads (Davis-Nozemack, Mossad and Head) are to coordinate with Powers to schedule a Team conference call for Wed, Jan 19<sup>th</sup>. (We established that the initial issue teleconference calls would be the Wednesday following our monthly Area 3 calls) The Lead should ask Powers to provide any necessary info prior to the call. If the Lead cannot handle this first call, they should contact another member of their team to coordinate these issues.

Moss leads the screening and the members are Turner, Janci and Lynn.

Browne leads the Quality Review (QR) subcommittee, with Hayes and Kennerty with her.

The first couple of calls the QR subcommittee meets, Moss and DaCorte will sit on the call to assist for transitional purposes.

Davis-Nozemack will do all legislative review on issues that come in.

### **Subcommittee Reports**

**Issue 16972 – Health Insurance for Subchapter S**—Moss said that the subcommittee is still in the research process. Lynn explained that the subcommittee asked for a subject matter expert, they joined the call and could not come to an agreement; they were supposed to call back with clarification and never did. The suggestions are to write-up the issue and send it through quality review.

**Issue 17723 – Power of Attorney Delay in Processing--**

**Issue 18156 – LITC Grants Matching—**

**Issue 18165 – Withdrawal/Revocation of POA**—Lynn reported that it would be in QR within two weeks.

**Issue 18914 – IRS Should Call Back When Disconnected—**

**Issue 18935 – Recording of Calls**—Mossad reported

### **Elevated Issues Information**

Lynn shared that when the Area elevate an issue it goes to the IRS for consideration. Below is a list of what the IRS recently reviewed.

- 16596 –Erroneous Information from IRS Employee –REJECTED
- 16597 – Deceased Taxpayer Information – Rejected by the IRS, the committee agreed by consensus to closed this issue as Closed—Lynn want to wait until after the Joint Committee call to decide how to close this issue. DaCorte and the committee feels that this issue was not a true rejection, because the IRS indicated that they are already in the process of making this change. The committee also would like to know how we would know if they have actually made the change.
- 17722 – Release of Federal Tax Lien – Under Consideration by the IRS, the committee wants to find out who sent this response. Lynn stated that the committee might just have to close—accept but she wants to speak with someone in the IRS first.
- 17957 – No Notice of Explanation with IRS Checks – Rejected by the IRS,
- 18151 – Notice of Deficiency - Lynn want to wait until after the Joint Committee call to decide how to close this issue. DaCorte and the committee feel that this issue was not a true rejection, because the IRS indicated that they are already in the process of making this change. The committee also would like to know how we would know if they have actually made the change.
- 18152 - Filing Petition with Tax Court - REJECTED

### **Outreach**

Moss just wanted to remind people about doing outreach and if you need any materials to please let the TAP staff know and they will get something out to you. Moss also reminded everyone about participating in EITC Day that is coming up at the end of the month.

### **Citizen Input**

None

### **Meeting Close**

**Next Meeting is a teleconference on February 14, 2011.**

### **Certification**

the Area 3 Committee approved these minutes, by consensus on February 14, 2011.