



2006 Meeting Minutes Area 4

- December 12, 2006
 - November 28, 2006
 - October 24, 2006
 - September 26, 2006
 - August 22, 2006
 - July 25, 2006
 - July 14-15, 2006
 - June 27, 2006
 - May 24, 2006
 - April 25, 2006
 - February 28, 2006
-

**Area 4 Committee Meeting
TAP Annual Meeting
December 12, 2006
Hyatt Regency Hotel on Capitol Hill
400 New Jersey Avenue NW
Washington, DC**

DFO:

Betty Martin, LTA, Nashville, TN

MEMBERS:

Ferd Schneider, Cincinnati, OH
Rashidah Abdulhaqq, Cleveland, OH
Maureen Amos, Chicago, IL
Larry Behnkendorf, Waterford, MI
Bob Broniarczyk, Romeoville, IL
Patricia Bryant, Millington, TN
Joe Hurr, Dayton, OH
Jeff Kennedy, Louisville, KY
Anne Khan, Chicago, IL
Mary Ann Lawler, Dearborn, MI
David Meister, Franklin, WI
Jerry Melchior, Vincennes, IN
Lovella Richardson, Knoxville, TN
Stan Wernz, Cincinnati, OH

MEMBERS ABSENT:

Paul Duquette, Amherst, WI

STAFF:

Sandy McQuin, Program Manager, Milwaukee, WI
Mary Ann Delzer, Program Analyst, Milwaukee, WI
Patti Robb, Secretary, Milwaukee, WI



Welcome / Review Agenda / Introductions

This year the new panel members began their terms December 1, 2006 and will complete their terms November 30, 2009. Information was passed out regarding the Taxpayer Assistance Centers survey. The TAC committee needs to have 400 surveys completed to have their data be considered viable. This is a two part survey. Both parts of the survey will need 400 responses. If you are interested in helping to conduct this survey, please contact Dave Coffman, Program Analyst in Seattle, WA.

This is Area 4

- **Ground Rules and Conference Call Etiquette**

Handout – conference call guidelines. The call in number and access code will always be at the top of the agenda and can also be found on TAPSpace. If you are unable to attend a call, please let one of the staff know or let the Chair know. All meetings need to be announced at least fifteen days in the Federal Register. Everyone will be receiving telephone calling cards to use for TAP business. Subcommittees can set up their own conference call or you can call Mary Ann Delzer and she will set everything up for you. All minutes from our meetings, are posted on our website; www.improveirs.gov

We operate by consensus.
Quorum will be half plus one.

- **2007 Calendar Preparation**

Conference calls will be the third Tuesday of each month at 11 am Eastern Time, 10 am Central Time. The face-to-face will be held on April 19-20-21, 2007. A cost comparison will be done for Memphis, Nashville, and Indianapolis. The meeting will begin at 1 pm on Thursday, April 19, meet all day Friday, April 20, and meet until 11 am on Saturday, April 21, 2007.

Chair Report

- **Approve Minutes of November 28, 2006**

It was suggested that the minutes be approved via email. They will go to Schneider and Betty Martin for approval. After their approval, Delzer will send them out to the rest of the committee for comments or changes. If there is no response in ten days, minutes will be considered approved.

November minutes were approved with one correction; Maureen Amos should be listed as present for the conference call.

- **Joint Committee Report**

The chairs of the area committees and issue committees make up the Joint Committee. The Joint Committee meets face-to-face twice a year. Plus there will be chair training again this year. Being a chair is a much larger time commitment. You are obligated to submit a report as to what is happening in your committee to the Joint Committee each month.

The Joint Committee elevated one of our issues at their last meeting.

- **Area 4 Self Assessment**



The information included in the Area 4 self assessment will be rolled into the TAP Annual Report. The self assessment is voluntary and can still be sent to Delzer for inclusion. Delzer will complete the Outreach portion of the report. Schneider will complete the rest of the report; accomplishments, issues under current consideration, issues tabled, disappointments. The draft report will be sent to all for review.

Working a Grass Roots Issues

Handout – workflow chart. Delzer explained the life of an issue.

- **Gathering Issues**

Issues can come through the toll free line, the website, a taxpayer, a tax practitioner, outreach, etc.

- **Prioritizing Issues**

How many people do we want on each of our subcommittees? Each subcommittee will need to have a leader. Floating committees – when an issue comes up that really interests someone, they can volunteer to work that issue (up to five members).

- **Reports**

Delzer prints out a contact history report for Area 4 every month. Toy runs a complete list of all TAP issues for the Joint Committee each month. The Joint Committee has decided they only want a list of active issues; the parking lot issues will no longer be included.

- **Use of Subcommittees**

The focus will be on the issues rather than on a committee.

Outreach Commitment

Everyone needs to set an outreach goal. Richardson put together a strategic plan for outreach. You can do a one-on-one; leave brochures, bookmarks, or pens at the library; congressional offices; short written announcements to your local newspaper; organized programs; etc. But it is important to keep track of all of your contacts.

ACTION: Delzer to include a tally of Outreach activities on each agenda so members can see the progress of the committee. Delzer will also record the outreach activities discussed on the conference calls and make sure they are recorded for the Outreach Report.

Area 4 Chair / Vice-Chair Selection

Chair: Ferd Schneider

Vice-Chair: Pat Bryant

Issue Review

#4028 – Toll-Free Number: Citizen expressed frustration with the toll free line regarding his inability to speak to a live person regarding a notice he received indicating a balance due that he did not think he owed. Parking lot.

ACTION: Delzer will email the Area 2 recommendation "Option for Access to Person on IRS Toll Free.



#4038 – Forms, Instructions, and Publications: caller wishes to send a tax package Fed Ex to one of the campuses. While the IRS provides a street address for such deliveries in the forms instructions, no phone number is listed. Most private mail services require a phone number for the recipient. What is a taxpayer to do?

ACTION: Delzer will research issue #4038.

Office Report

McQuin there will be very limited staff in the office the week between Christmas and New Year's.

Closing / Assessment

Next meeting: Tuesday, January 16, 2007, 10:00 am Central Time

ACTION Items:

Delzer to include a tally of Outreach activities on each agenda so members can see the progress of the committee. Delzer will also record the outreach activities discussed on the conference calls and make sure they are recorded for the Outreach Report.

Delzer will email the Area 2 recommendation "Option for Access to Person on IRS Toll Free.

Delzer will research issue #4038.



**Area 4 Committee Meeting Minutes
Conference Call
November 28, 2006**

Designated Federal Official

- Betty Martin, DFO

Committee Members Present

- Rashidah Abdulhaqq, Ohio
- Maureen Amos, Illinois
- Larry Behnkendorf, Michigan
- Paul Duquette, Wisconsin
- Joe Hurr, Ohio
- Mary Ann Lawler, Michigan
- Jerry Melchior, Indiana
- Marie O'Donnell, Illinois
- Lovella Richardson, Tennessee
- Ferd Schneider, Ohio

Committee Members Absent

- Robert Broniarczyk, Illinois
- Kimberly Chowning, Indiana
- Donna Hafer, Kentucky
- David Meister, Wisconsin
- Don Miller, Tennessee

TAP Staff

- Bernie Coston, TAP Director
- Sandy McQuin, TAP Manager
- Mary Ann Delzer, Program Analyst
- Patti Robb, Secretary

Visitors

- Patricia Bryant, New Panel Member
- Anne Khan, New Panel Member
- Stanley Wernz, New Panel Member

Welcome / Roll Call / Review Agenda

Ferd Schneider welcomed the new panel members in attendance.

National Office Report – Bernie Coston

Sandy McQuin stated approval was received from Treasury to select the new members. Milwaukee has contacted all our new members and everyone will be at the annual meeting. Bernie Coston is in



DC this week moving the main TAP office.

Coston thanked Donna Hafer and Don Miller for their time, efforts, and contributions, during their tenure with TAP.

Chair Report

- **Approve Minutes of October 24, 2006**

Approved by consensus.

- **Joint Committee Report**

Schneider reported that the Joint Committee approved Issue 3705, Forms, Web Availability of OCR. A response was already received from the IRS!

- **Area 4 Self Assessment**

Mary Ann Delzer received six responses to date and has consolidated the information. However, this is only a small part of the self assessment, as the complete report is due by December 31, 2006. Schneider urged everyone to respond with their self assessment report. There is a lot of work that needs to be done for the final report. Delzer shared that last year the report writing was divided up among many panel members. The report gets melded with the rest of the Area and Issue Committee reports to become the TAP Annual Report.

Action: Delzer will forward the 2005 Area 4 self assessment to Schneider.

Public Input

None.

Subcommittee Reports

- **Issue Review – Ferd Schneider**
 - **Issue # 3988 - Form 4506, Request for Copy of Tax Return, (and Form 4506 T, Request for Transcript of Tax Return)**

You can attain a copy of your tax return using this form. When signing this form, it gives a third party access to your personal data. We think the caution should be in bold type or made more noticeable. This issue will be considered at the next Joint Committee meeting in December.

- **Forms and Publications-Mary Ann Delzer**
 - **Issue # 3694 – Employer Identification Number (EIN) in Publication 393, 2005 Federal Employment Tax Forms**

Delzer said by looking at the emails, consensus was this issue should be closed. This will be a non-issue in 2007 as they redesigned the forms W-2 and W-3.

- **Customer Issue – Mary Ann Delzer**

Issue # 3706 – Form 8453, U.S. Individual Income Tax Declaration for an IRS e-file Return. Delzer sent everyone a copy of Area 1's recommendation approved by the Joint Committee. One option is to monitor the issue and see how IRS responds to the Area 1 recommendation. McQuin questioned why IRS is missing one million of these signature documents. Staff does VITA returns in the office and we get requests for these forms every year even though we know we already sent them. Betty Martin



said a systemic issue was raised about this very issue. Paul Duquette suggested the issue be kept in the parking lot and then monitor to make sure we don't lose track of it. Patricia Bryant noted that the IRS really has a problem as to how they handle these forms and where and how to store them. Martin said some Declaration Control Numbers are entered manually and that may cause some of the errors. The consensus was to put it in the parking lot but monitor. Several members of this area are VITA and TCE volunteers so should know if the numbers of these notices decline this year. Stan Wernz said we were encouraged to use practitioner pins and Form 8879, IRS e-file Signature Authorization and to only use Form 8453 when we have to. The Forms 8879 have to be kept by the site coordinator or they get mailed to the IRS.

ACTION: Betty Martin will check into the status of the systemic issue regarding IRS non-receipt of Forms 8453.

Issue #3705, Forms, Web Availability of Optical Character Recognition (OCR). TAP sent the recommendation to Sue Sottile, Director, Strategic Planning, on November 21, 2006, and we already received a response. OCR forms can not be submitted to IRS if printed from irs.gov. Area 4 recommended that a notice and link be put on irs.gov that these forms can be ordered from the IRS website. The basic response received was the IRS likes our recommended solution. We can accept this response and close the issue; then monitor to make sure the changes are completed. McQuin said if proposal is accepted and closed, it will show up in the TAP Annual Report as a success for the Area 4 Committee. We should accept and then can unofficially check on it. Status of issue to be recorded "Closed, Proposal Accepted." Joe Hurr volunteered to keep an eye on this issue. McQuin said this recommendation was simple, concise, and clear and that is probably one reason why it was accepted and will be implemented.

Outreach

Schneider said one of our duties as a panel member is to make sure people know about TAP; that is outreach. It is important and we all need to do it. There is a format to use to help simplify reporting outreach completed, but you do not have to use it. You just need to know it's important to do it and report it. This information gets integrated into the annual report too.

ACTION Item Review

All action items have been completed.

Office Report

- **Annual Meeting**

McQuin reported that a reception is scheduled for Monday night at the Capital City Brewery; more information will be forthcoming. Area committees will be going to dinner on Tuesday evening. These dinners are not mandatory and spouses are welcome. Issue committees will be going out Wednesday evening. You will each pay for your own dinner since you will be on per diem. There will probably be a group of about 25 and the reservation is usually made for around 6 p.m.

McQuin will be sending out a package of pre-read information to the new members. This will be discussed during the conference call scheduled for next week Thursday, December 7.

We need to know if you need business cards. Please let Delzer know as soon as possible. The sooner we order them, the sooner we get them. Also, please make sure you bring your emergency contact information sheet as well as your signed Volunteer Agreement to Washington, DC with you.

Coston congratulated the new members on their selection and their willingness to be part of an organization that is evolving into a major player in IRS issues. He reiterated that outreach is very important; the only way for people to know about TAP is for you to get the word out. Please take the



time to do outreach. Coston also asked that everyone respond and consider volunteering to help with the Taxpayer Assistance Centers (Taxpayer Assistance Centers) survey developed by the TAC Committee.

The next meeting December 12, during the TAP Annual Conference.

Meeting adjourned.



**Area 4 Committee Meeting Minutes
Conference Call
October 24, 2006**

Designated Federal Official

- Betty Martin, DFO

Committee Members Present

- Rashidah Abdulhaqq, Ohio
- Robert Broniarczyk, Illinois
- Paul Duquette, Wisconsin
- Donna Hafer, Kentucky
- Joe Hurr, Ohio
- Mary Ann Lawler, Michigan
- Jerry Melchior, Indiana
- Don Miller, Tennessee
- Marie O'Donnell, Illinois
- Lovella Richardson, Tennessee
- Ferd Schneider, Ohio

Committee Members Absent

- Maureen Amos, Illinois
- Larry Behnkendorf, Michigan
- Kimberly Chowning, Indianapolis
- David Meister, Wisconsin

TAP Staff

- Sandy McQuin, TAP Manager
- Mary Ann Delzer, Program Analyst
- Patti Robb, Secretary

Welcome / Roll Call

Quorum met.

Chair Report

- **Approve Minutes of September 24, 2006**

Minutes approved as submitted.

- **Joint Committee Report**

Ferd Schneider made his report on the Area 4 issues elevated to the Joint Committee in October.

1. Issue 3718, Forms - Lack of Availability – was approved and elevated to the IRS.
2. Issue 3705, OCR Form Availability – was discussed in conjunction with issues 3734, 3758, 3570, and 3908 from Areas 1 and 3. The Joint Committee felt that these issues are similar in nature and one referral should be completed. Sandy McQuin commented that she thinks the Area 4 referral was very well written, but the combined referral is not as well written with Area 4's recommendation buried. The way this recommendation currently reads, your interim solution is listed as the very last solution, and should be listed first. Hurr agreed with McQuin and stated the Area 4 suggestion could be implemented immediately so it should be listed first as the other solutions will take time to implement.

ACTION: Schneider will inform Area 3 and 1 that Area 4 Issue 3705 will stand on its own and be presented to the Joint Committee.

3. Mentors – the Joint Committee is recommending every new member get a mentor if they want one. Think about this. Hurr thought each new member should have a mentor from their area committee as well as a mentor from their issue committee.
4. Staff workload is significant so the Joint Committee discussed having full area committee conference calls every other month and having subcommittee meetings during opposing months. McQuin said some issue committees do this already. It was hoped the area committees would meet on even or odd months and the issue committees meet in the opposite months. Marie O'Donnell thought this could be effective. Lovella Richardson liked the idea too. Broniarczyk thinks the committee needs to meet on a monthly basis as much more can be done. Donna Hafer agreed. Jerry Melchior thinks every other month will slow the flow of the issues and can cause loss of continuity. Don Miller agreed. Hafer felt the face-to-face meeting is the most productive, then conference calls, then emails. The calls help us get to know each other better as well. Broniarczyk said he thinks people will tend to lose interest if you don't have meetings on a monthly basis. McQuin thought this might be a way to ease the time burden on some panel members
5. Communication Strategies – the Joint Committee pretty well agreed to the suggested strategies. Document went back to the Communications committee for some tweaking but Schneider suspects it will ultimately be agreed to.
6. The preliminary agenda for the annual meeting was discussed. Orientation for new members will be at 8 to 10:30 a.m. on Monday, December 12. Returning members will join the meeting at 10:50 a.m. Areas 4 and 5 will have a combined administrative meeting at that time. McQuin said the reasoning behind the combined meeting is to cover general information such as how issues flow, how meetings are run, agendas, how this office handles day-to-day emails, calls, duties etc. This will be an chance for members to meet each other and get to know people another area a little better. Sort of a small scale networking. Plus it lets everyone get to know the staff a little better. Schneider said the combined meeting would break for lunch and then the general session would begin. There will also be more information coming out about the election process for TAP Chair and Vice Chair. McQuin said if anyone is planning to run for these positions, they can throw their hat in early. There is a planned social evening scheduled for Monday night at the Capitol City Brewery. Those running for chair will have an opportunity to network then. The area chairs will be determined before the issue committees meet.
7. TAP Annual Report process was briefly discussed. It is a compilation of the area and issue annual reports. You will be receiving a questionnaire to complete and return



indicating your assessment of the Committee's progress during calendar year 2006. Please be candid and return the questionnaire promptly.

It was a very productive meeting in Dallas and a great deal was accomplished.

Public Input

None.

Subcommittee Reports

- **Issue Review – Ferd Schneider**

The subcommittee has been working on the issue regarding people requesting a copy of their tax returns or a transcript for a third party. We are looking at recommending bolding the "caution" statement on Form 4506 to alert taxpayers to the consequences of sharing tax return information with third parties. Hopefully this recommendation will be ready to be sent out in a couple weeks for the whole committee's approval. It is one we hope to elevate next month.

- **Customer Issue – Maureen Amos**

Amos was not on today's call and so will discuss on next month's agenda.

New issues:

We received two new issues this month.

Issue 4019 – Third Party Return Preparation – A preparer tried to file a Power of Attorney (POA). He said it took over a month to get the POA on record. McQuin said IRS has e-services and can give POA within the same day, so there is a process in place to bypass this problem.

ACTION: Delzer will check to see if there is contact information in regard to issue 4019 and if so, will share the e-services information with them.

Issue 4020 – Toll Free Number – Taxpayer had difficulty reaching the applicable person in the IRS to speak to about a specific issue. This issue was elevated already so should be put in the parking lot to see what happened. A couple of other Area's are addressing this issue also (Issue 3580 is basically the same issue). Schneider will do some research and will be monitored.

ACTION: Delzer will send out the recommendations elevated regarding IRS toll free for the whole committee's review.

Outreach

McQuin said the Congressional outreach Rashidah Abdulhaqq attended has been shared internally throughout TAS. Abdulhaqq said it was a very interesting outreach. It was a long meeting but they talked about the total process you go through during an audit. This could be presented during the annual meeting as a workshop, although it would have to be shortened. An audit is not just a random thing. Delzer explained IRS uses a DIF score. Rashidah said the IRS employees walked through this process and it really helped. She had time to talk about TAP at the end of this outreach.

McQuin, Meister, and Duquette attended National Association of Tax Practitioners (NATP) conference last week. Duquette had an opportunity to speak about TAP. He was the last person standing between the audience and lunch and most of the group stopped to talk to TAP after lunch.

Action Item Review

All action items were completed. Decision: Consensus to drop Issue 4004. Apparently in this case, the IRS employee handled this issue incorrectly.



Office Report

- **Conference Call Days / Times**

All area are being asked to talk about times/dates for meetings next year. Schneider asked that the conference calls be held earlier in the month as the Chair needs to submit a monthly report. It would give the chair more time if the meeting was held the third Tuesday of the month rather than the fourth.

CONCLUSION: Area 4 calls will be held the third Tuesday of each month and will begin at 10 a.m., CT (one hour earlier than current). This change will be implemented in January.

Face-to-Face Meeting in 2007

Schneider noted that Area 4 will be meeting face-to-face during the annual meeting in December to work issues. He felt the day and a half wasn't enough so maybe it should be extended to two days.

CONCLUSION: The week of April 23 was tentatively identified for the face-to-face meeting. The final decision can be made at the annual meeting.

- **Annual Meeting**

Registration will be held Sunday afternoon and Monday morning, December 10-11, 2006. There will also be an informal social in the lobby Sunday evening. This would provide a chance for new and returning members to get to see and know other panel members and staff.

Next Meeting November 28, 2006

The Joint Committee reminded everyone that they don't want the committees to wind down at the end of the year. Keep the workflow going into the new year.

Closing/Assessment

Meeting adjourned.



**Area 4 Committee Meeting Minutes
Conference Call
September 26, 2006**

Designated Federal Official

- Betty Martin, DFO

Committee Members Present

- Rashidah Abdulhaqq, Ohio
- Larry Behnkendorf, Michigan
- Robert Broniarczyk, Illinois
- Paul Duquette, Wisconsin
- Donna Hafer, Kentucky
- David Meister, Wisconsin
- Jerry Melchior, Indiana
- Don Miller, Tennessee
- Marie O'Donnell, Illinois
- Lovella Richardson, Tennessee
- Ferd Schneider, Ohio

Committee Members Absent

- Maureen Amos, Illinois
- Kimberly Chowning, Indianapolis
- Joe Hurr, Ohio
- Mary Ann Lawler, Michigan
- Allen Scioli, Michigan

TAP Staff

- Mary Ann Delzer, Program Analyst
- Patti Robb, Secretary

Visitors

- Barbara Delbene, National Community Tax Coalition

Welcome / Roll Call

Quorum met.

Chair Report

- **Approve Minutes of August 22, 2006**
Minutes approved as submitted.



- **Joint committee report**

The Joint Committee had a discussion on how the chair and vice chair are elected for the TAP. All the areas submitted their recommendations to the Joint Committee, however they could not reach consensus. It was decided to revisit this during the Joint Committee face-to-face meeting in October. The Joint Committee also discussed the response to the IRS Oversight Board inquiry concerning IRS measures. The oversight board is appointed and they report to Congress. These discussions took so long, there was no time left to discuss elevated issues so they were put on the agenda for the October meeting.

Public Input

Barbara Delbene, National Community Tax Coalition. This coalition is a VITA program. She was asked to get more involved in looking at the administrative portion of the IRS, particularly customer service, so decided to join the conference call today.

Ferd Schneider told her that TAP is charged to address issues that are identified by the general public. We sift through these issues and determine which seem to be systemic. We do research, come to a conclusion and then make a recommendation to the IRS. Each of the TAP members also serves on an issue committee. The IRS provides direction to the issue committees. One of the issue committees is a VITA committee. They have been working on the VITA test the volunteers have to take before they can be certified to prepare tax returns.

Subcommittee Reports

- **Issue Review**

Ferd did look at the reports send by Delzer. The contact history report was dated September 6 and the issue report was dated September 5. There were four new issues.

3761 – Innocent Spouse – IRS employee who brought the issue to TAP is satisfied with the information on the issue on irs.gov. — **Close**

3694 – Publication 393—When form W-3 are sent preprinted, EIN not secure as no envelope is used. Program owner said they are redesigning the W-2 and W-3, which may mitigate the problem. Will put in the parking lot and monitor. — **Parking lot**

3706 – E-file Forms 8453 Not Received – Area 1 wrote recommendation and sent to Joint Committee. Will wait for Joint Committee response. — **Parking lot**

2971 – E-file Rejects, Extend Time for Filing – Will consider if the issue resurfaces this next filing season. — **Drop**

3817 – Fraud Reporting to CI. Delzer gave to Area 5 as they have been working on this issue. **Drop**

3988 – Third party requests Form 4506 - . Broniarczyk thinks disclaimer on form should be in bold or larger type. People need to read the form more closely before they signing. **Active**

ACTION: Issue review committee will write up a recommendation concerning the highlighting or bolding of the disclaimer statement on Form 4506.

New Issues

3993 – 1099R Coding - customer issue committee is looking at. Delzer is working on research for this issue at this time. **Active**



3994 – Application of Estimated Payments. Delzer said this is a big issue in Ohio, but does not seem to be an overreaching IRS problem. **Drop**

4001 – Wait Time at Taxpayer Assistance Centers - service issue and how TAC offices handle problems. Different assistors handle different problems.

ACTION: Delzer to forward to wait time in TAC offices to Area 5 as they are currently working this issue.

4004 – Return Processing - IRS received state return with payment. Did not forward return to the state and taxpayer was upset as she didn't find out for two years. **Active**

ACTION: Delzer to research to see what procedures IRS is supposed follow when IRS receives state tax returns in error.

Outreach

The final outreach report will be generated soon for the annual report. If you have any outreaches you haven't submitted, please report to Delzer ASAP.

Office Report

- **Face-to-Face Meeting, 2007**

The committee needs to pick two tentative dates for a face-to-face meeting next year, so staff can put them on the calendar. This needs to be discussed during the October agenda. The staff will need to block out time for recruitment activities, staff training and meetings as well. Area 4 should have four new members, perhaps we will know who they are and they will be able to join us on the October call to provide their input.

- **Annual Meeting**

The current version of the draft agenda has orientation is scheduled to begin at 8 a.m. for new members. That will last until about 10:30. The area committees will have combination meetings with their staff from 11 a.m. to Noon. Everyone will travel to Washington, D.C., on Sunday, December 10 to meet on Monday. The meeting is scheduled to end around 11 a.m. on Thursday, December 14, so everyone can travel home that afternoon. We are trying to schedule longer area meetings per your requests. The names of the potential panel members have been sent to Nina Olson, National Taxpayer Advocate, and to Treasury

The next meeting will be the October 24, 2006, conference call.

November 28 will be the last conference call before the annual meeting.



**Area 4 Committee Meeting Minutes
Conference Call
August 22, 2006**

Designated Federal Official

- Sandra McQuin, TAP Manager

Committee Members Present

- Larry Behnkendorf, Michigan
- Robert Broniarczyk, Illinois
- Paul Duquette, Wisconsin
- Joe Hurr, Ohio
- Mary Ann Lawler, Michigan
- David Meister, Wisconsin
- Jerry Melchior, Indiana
- Lovella Richardson, Tennessee
- Ferd Schneider, Ohio

Committee Members Absent

- Rashidah Abdulhaqq, Ohio
- Maureen Amos, Illinois
- Kimberly Chowning, Indianapolis
- Donna Hafer, Kentucky
- Steve Hoffman, Ohio
- Don Miller, Tennessee
- Marie O'Donnell, Illinois
- Allen Scioli, Michigan

TAP Staff

- Mary Ann Delzer, Program Analyst
- Patti Robb, Secretary

Welcome / Roll Call

Quorum met.

Chair Report

- **Approve Minutes of July 14-15, 2006, and July 25, 2006**
Minutes were approved as submitted by consensus.
- **Joint committee report**
Schneider forwarded a request from TAP Director Bernie Coston, asking for panel members to volunteer to work on several committees. Assignments are to be completed before the annual meeting in Washington, D.C., in December.



1. Establishment of a vision statement for TAP
2. Improvements to the TAP member description
3. Look at ways to evaluate members
4. Measures of TAP's success

Also looking at the orientation or training of new TAP members at the annual meeting. Hurr's name was submitted as a new panel member. The panel members selected for the committees have not been shared at this time.

McQuin stated that currently the plan for the annual meeting to start at 1 p.m. on Monday, December 11 for the returning members. Orientation for new members will be Monday morning. It was decided that any panel members who were unable to attend the new member orientation last year, can attend this year. Agenda items are still being identified but it looks like the meeting will end on Thursday; just not sure exactly what time. Panel members will travel home Thursday afternoon or Friday some time.

5. **VITA Report for the Commissioner**

The Panel's report went to Commissioner Everson last week. The Area 4 Volunteer Income Tax Assistance (VITA) report turned out very nicely.

6. **OCR Forms Issue**

Ferd Schneider heard from Area 3 about the Optical Character Recognition (OCR) forms issue. He thought that it didn't seem to be going anywhere right now. He felt the whole topic seemed to be somewhat confusing. The issue is not OCR, it is the scan-ability of forms. Schneider was still waiting to hear more from J.T. Wright as he would like to know where the issue is at this time. McQuin had been following all the emails between all the committees. She thought the bottom line is despite the fact that Area 3 attempted to combine similar issues, they made a request that they be allowed to submit their own issue as is. She has been working with everyone involved with this issue and recommended that Area 4 submit their own recommendation based on the write up by Joe Hurr. The other groups cannot seem come to consensus. Schneider agreed and will ask Hurr to write it up using the correct format.

Public Input

None

Subcommittee Reports

• **Issue Review**

There is not much new to report right now. Area 4 has three new issues on the latest list.

3986 – Can IRS remove complete SSN information from its correspondence. Could only last 4 digits be used? McQuin noted that one of the TAP reports for the Commissioner included this issue. Drop

3987 – Practitioner called Automated Collection System toll free number. Call was flipped to the 1040 number because of call volume. When got through to a person, gave the taxpayer's story and then told this is the regular number... you have to call ACS... all after a very long wait. Drop

3988 – Why should third parties get tax information? Client came to practitioner with concern over mortgage company request that client sign a blank form 4506, Request for Copy of Tax Return. Mortgage company said this was needed if client defaults later. Should this information really be available to a third party? This is not an IRS systemic issue – this is a mortgage industry issue or an education issue. McQuin thought this could possibly be a potential issue for Stakeholder Liaison (SL). Duquette suggested making a recommendation to the SL suggesting education. He felt it should be looked into. McQuin noted the main reason for this form is for taxpayers to get copies of their returns.



The Area 4 issue review committee will make a recommendation whether to work or not at the next meeting.

ACTION: Delzer to send copy of Form 4506 and instructions to Issue Review Committee.

Bob suggested dropping issue #3816. Delzer talked to the owner of Form 2210, Underpayment of Estimated Tax by Individuals, Estates and Trusts, and there are no plans to revise the form this year. Drop.

- **Forms and Publications**

Issues # 3763, #3718 - Delzer suggested that both forms and publications issues be combined. They have very similar recommendations; both have elements about how IRS communicates with taxpayers as to how they can get information about ordering forms.

ACTION: Delzer will combine these recommendations and will send out for approval via email. Then it can be put on the Joint Committee agenda for the face-to-face in October.

McQuin noted that even if the first response from the IRS is that they cannot add anything to the Form 1040, TAP can certainly make that recommendation. Delzer thought something might be added that they better communicate through the media to tell people they can order their forms and publications on line. It would save the IRS money if they didn't have to print excess forms and publications because people would order their own. Richardson heard complaints that taxpayers could not get forms at the walk-in office.

Issue #3705 and # 3488 will be combined. They both have to do with the OCR issue.

Lovella Richardson was interested to know how many people check the box to contribute to the presidential campaign. She suggested changing it to a checkbox to request that next year's tax forms be sent.

ACTION: Delzer will find out how many people actually check the presidential contribution box.

Outreach

McQuin prepared a report for the TAP Director regarding outreaches. She counted all outreaches done by Area 4 and came up with 32 separate outreaches with over 800 taxpayers reached. Media outreaches (articles in newspaper and television/radio interviews) were not included; just face-to-face. All your outreaches are being captured and noted in various ways. That is a lot of people and you are encouraged to continue to send in these reports. They do get used.

ACTION Item Review

All action items have been completed

ACTION: Robb will check with SATO to see if they forward traveler's contact information to the airlines when making flight arrangements.

Office Report

- **National Taxpayer Advocate Objectives Report 2007**

Delzer sent out the TAP portion of the 2007 National Taxpayer Advocate Objectives Report. If you want to look something up, it is available at

<http://www.irs.gov/advocate/article/0,,id=159974,00.html>

The table of contents was also sent so you can see if there is anything else you would like to



review. You will be seeing more and more of National Taxpayer Advocate comments on private debt collection.

Larry Behnkendorf announced that the Burden Reduction Issue Committee is looking at income tax withholding on Forms 1099, as the NTA had discussed in her earlier report. Workers who thought they were considered employees, often find they have no withholding at the end of the year. This is a problem for more and more low income people.

ACTION: Members to forward thoughts about income tax withholding on Forms 1099 to Behnkendorf.

Closing / Assessment

The next conference call is scheduled for September 26, 2006. Hopefully our issue will be ready to elevate to the Joint Committee before the next meeting.



**Area 4 Committee Meeting Minutes
Conference Call
July 25, 2006**

Designated Federal Official

- Betty Martin, Local Taxpayer Advocate (LTA)

Committee Members Present

- Rashidah Abdulhaqq, Ohio
- Maureen Amos, Illinois
- Larry Behnkendorf, Michigan
- Robert Broniarczyk, Illinois
- Kimberly Chowning, Indianapolis
- Paul Duquette, Wisconsin
- Donna Hafer, Kentucky
- Steve Hoffman, Ohio
- Mary Ann Lawler, Michigan
- David Meister, Wisconsin
- Jerry Melchior, Indiana
- Don Miller, Tennessee
- Lovella Richardson, Tennessee
- Ferd Schneider, Ohio
- Allen Scioli, Michigan

Committee Members Absent

- Joe Hurr, Ohio
- Marie O'Donnell, Illinois

TAP Staff

- Sandra McQuin, TAP Manager
- Mary Ann Delzer, Program Analyst

Welcome / Roll Call

Ferd Schneider welcomed everyone to the call. Quorum met.

Chair Report---VITA report for the Commissioner

Chowning sent version number five of the report. Hafer advised need to spell out acronym TCE (Tax Counseling for the Elderly). Schneider thanked Amos for the initial writing of the report, incorporating the notes from the VITA committee. Thanks as well to Chowning writing the final version. The whole process worked very well. Amos' version gave the committee a good place to start the conversation in Chicago. Discussion in Chicago produced additional suggestions. Chowning took those comments and did an excellent job writing the final document.

Consensus to forward the report to the Joint Committee.



Action: Delzer to send VITA report for the Commissioner to Toy for discussion at the Joint Committee. Delzer to send a copy of the final report to Area 4 members.

Broniarczyk asked to discuss his research on issue 3816 concerning Form 2210, Underpayment of Estimated Tax by Individuals. The instructions are four pages and you are also advised to see Publication 505, Tax Withholding and Estimated Tax (67 pages).

Publication 505 has examples for the Form 2210 and I think it was very straight forward. If you understand your investments, you should understand the instructions. I suggest Area 4 drop the issue. Schneider did not have time to review the publication. When use the computer, the penalty is not particularly difficult. Many people have high and low income quarters and the IRS assumes all income is earned equally. Miller said when he reads the issue description, the caller is saying instructions do not match the form. Broniarczyk stated he thinks they do match the form. Schneider suggested Issue Review subcommittee meet to look at this further.

Meister shared that issues 3718, 3488 and 3763 are being written up and will be ready in the correct format before the next call.

Meeting adjourned.



**Area 4 Committee Meeting Minutes
Face-to-Face Meeting
Hotel Indigo, Chicago
July 14-15, 2006**

Designated Federal Official

- Betty Martin, Local Taxpayer Advocate (LTA)

Committee Members Present

- Larry Behnkendorf, Michigan
- Robert Broniarczyk, Illinois
- Kimberly Chowning, Indianapolis
- Paul Duquette, Wisconsin
- Donna Hafer, Kentucky
- Steve Hoffman, Ohio
- Mary Ann Lawler, Michigan
- David Meister, Wisconsin
- Jerry Melchior, Indiana
- Don Miller, Tennessee
- Marie O'Donnell, Illinois
- Lovella Richardson, Tennessee
- Ferd Schneider, Ohio

Committee Members Absent

- Rashidah Abdulhaqq, Ohio
- Maureen Amos, Illinois
- Joe Hurr, Ohio
- Allen Scioli, Michigan

TAP Staff

- Bernie Coston, TAP Director
- Sandra McQuin, TAP Manager
- Mary Ann Delzer, Program Analyst
- Patti Robb, Secretary

Friday, July 14, 2006

Welcome

Ferd Schneider welcomed everyone to the meeting and introductions were made by everyone.



Director's Comments

The Joint Committee met a couple weeks ago, and several things came out of that meeting about how we want to conduct business.

- The Commissioner asked for TAP's opinion on five different areas. As you can see, TAP has gone to another level as far as people looking for our input. The Joint Committee will put together the final report for the Commissioner. He has maintained that he will keep communications open with the TAP.
- The Joint Committee also discussed the annual meeting and ways to improve the experience. Based on feedback received from members, we are looking for returning members to take a more active part in the meeting. Miller felt this is a good idea since it is confusing when you are a new member. Melchior agreed; it's a whole new world. Behnkendorf felt continuing the mentoring program is valuable. Information is in the TAP member handbook, but it is easier if you actually can discuss things with someone. Coston stated the concern is that there have been too many workshops. TAP members would like you to be able to spend more time in committee meetings. There is value everyone coming together in the sessions but we heard from you that you would like more time in committees. The annual meeting will be held the week of December 10, 2006, at the Hyatt, in Washington, DC. We haven't determined the agenda yet, but one thing the Joint Committee had definitely decided is that the chairs will not be doing their committee reports.
- It was also decided that TAP will not take a break right before the annual meeting. The committees should continue to meet all year. This may impact the staff as they will have to continue to work the issues as well as working on the annual meeting. We are looking at how to utilize the TAP members more and "tap" member skills; communication, administrative, etc. Broniarczyk thinks the annual meeting is critical because each committee gets one face to face meeting other than getting together during the annual meeting. McQuin stated that the hope is that there will not be as much administrative items during the committee meetings. You will actually be working on issues. Schneider said TAP members' commitment is until November 30 and now will be a three year commitment. The new TAP members will be selected before the annual meeting and so we will invite them to attend out teleconferences to help them transition.
- Coston said if returning members wish to stay on their current issue committee, they will have that option. McQuin said last year was challenging as we brought on 60 new members, this year we will only be bringing on 28. We try to make sure each issue committee has representation from all of the areas. Some areas did struggle because we didn't replace members who resigned. The goal was to get to a point where we are not replacing two-thirds or three-quarters of the panel members at one time.
- Coston asked how we can measure the success of TAP. One of the ways is through looking at recruitment. We had over 750 applicants this year and the level of skills the applicants have is incredible. We can attribute this successful recruitment to each and every one of you. IRS Program Owners have been amazed at the way you tackle your issues and your responsiveness when they ask for your input and ideas. The support we get from the IRS is phenomenal.
- The committees have been very effective using the teleconferences. I know you would like to have more face to face meetings but the budget won't allow them. We may look at letting subcommittees meeting face to face to see if that is more effective. One thing that's very important is Outreach. Don't limit your ideas as far as outreach.



- The IRS office building in Washington, DC, was flooded last month and most likely will not reopen until after the first of the year. TAP staff in DC will get temporary space to continue to work throughout the year.
- The National Taxpayer Advocate has just submitted her Objectives Report. She has mentioned TAP in her report. TAP has made a difference and continues to make a difference.
- The staff will be in New Orleans next week at their annual continuing professional education.
- Once again, I would like to thank you all for all your hard work. And thank you for your support in doing the interviews.

Chair Report

The minutes for the June 27, 2006 meeting were approved as submitted by consensus.

The Joint Committee has a review subcommittee that looks at format and grammar of all issues that are intended to be elevated.

The Communication Committee is working on things to help all TAP members, i.e., a new communication strategy. It involves a lot of the tools to help everyone do outreach.

We plan to continue the exit surveys as members rotate off the panel.

Duquette explained that Congress has required IRS to prepare a report regarding delivery of customer services; the Taxpayer Assistance Blueprint (TAB). A survey was sent out to all the TAP members and a lot of you responded. There was pushback by the Joint Committee that there were 40,000 surveys being sent out by TAB to taxpayers and TAP was not a part of this process as they rolled out the survey. TAB assured TAP that they were not left out but were included in phase one and they planned to keep TAP in the loop. Duquette feels that TAP needs to provide input on the final TAB report. McQuin said TAP will not see the report before it is finalized and sent to Congress. TAP is to address customer service issues whether they appear in the report or not.

TAP Chair/Vice Chair Election

The Joint Committee discussed possible changes in the way the chairs of committees are elected. The way it was done last year made it difficult to elect committee chairs. It was suggested that the TAP chair and vice chair be elected prior to the annual meeting. People who are thinking about going for these positions could throw their names in the hat. It seems that there could be a vote via email before the annual meeting and then there could be a handoff.

Broniarczyk stated this was a good idea since they could put their picture and thoughts in an email and send it out to all current members so by the time you got to the annual meeting, you would already know who the chair is. Behnkendorf liked the idea, however do not include the pictures. Some people vote for someone because they like the way someone looks.

McQuin said one thing discussed at the Joint Committee was a nominating committee, but this was not included in Comb's email message. Schneider wouldn't like to see that because you don't know everyone on the TAP. The nomination committee can't either. Plus you may have someone who would like to run that does not get nominated. This position is very time consuming so if you are going to run, you have to consider that.

Broniarczyk thought maybe you could have all the members' vote, those rotating off, the returning members, and the new members. Duquette said those rotating off have a good knowledge of what is expected and the ability of those who want to run. They could make an informed decision. Chowning



felt, as a new member, voting for the chair making a pointless decision. New members do not have enough knowledge of what TAP is or does.

Richardson stated her interest was to see the person speak. Ferd said this is a valid comment. Chances are the person who is running is a decent public speaker and would represent TAP well. Hafer suggested having a conference call and those who were nominated can speak and all members could call in to hear their platform. Or you could possibly load something on TAPSpeak.

Chairs for Area or Issue Committee

As far as issue committee, members may change for the new year. Broniarczyk thinks they should be elected at the committee meeting as this really does not take much time.

Schneider thinks the area committees should meet before the issue committee. Coston said that will happen this year. One suggestion we heard is to elect all chairs; TAP chair, vice-chair, and the area committee chair, before the annual meeting. Perhaps the area committee chair could be elected before the annual meeting and the vice chair could be elected at the annual meeting. Behnkendorf said at least one new member became a chair last year so there is interest there. Broniarczyk stated he thinks they both should be done at the annual meeting.

Schneider said that conceptually, how you would conduct an election on a teleconference and have it be confidential. Hafer suggested sending an email to Delzer. Coston reminded all that some committees may not have very many new members. For instance, Area 4 will only have three new members. Broniarczyk stated that all elections should be done the same. Duquette related that continuity on an issue committee is so very important. To disrupt that could be almost disastrous.

Meister explained the experience brought to the meetings by the second year members is invaluable. As a new member, it can be very confusing. I think the current members should stay on the issue committee they are on right now. Broniarczyk said you need to try to ensure at least some members stay on the issue committee. If all the experienced members decide to stay and then rotate off the panel at the same time, it could be disastrous. McQuin stated that the staff can go out and poll the members to see if they want to change their issue committee, since all the issue committees will continue.

Schneider stated if we vote for chairs before the annual meeting, new members will not get to vote. O'Donnell said some people are reticent to volunteer to be chair until they are at the meeting and they see the group dynamics. Delzer said using consensus works the best to identify a committee chair. Broniarczyk agreed it should be done at the annual meeting.

ACTION: Schneider will report back to Joint Committee that TAP chair and vice chair be elected ahead of time. Area chairs and issue chair need to be chosen at the annual meeting, with area chairs considered first.

Issue Discussion

- **VITA Report for the Commissioner**
What does TAP see as the future for VITA/TCE. Amos has prepared a draft response. Schneider outlined the Volunteer Return Preparation Program (VRPP) program; Volunteer Income Tax Assistance (VITA), Military VITA, Tax Counseling for the Elderly (TCE) and International (which is very small). VITA does low income tax preparation for people who qualify for EITC. TCE does returns for taxpayers 50 years or older and income under \$50,000. TCE will do rental income if there is no depreciation involved. Generally do not prepare self-employed returns unless can do the C-EZ. Some sites still do paper returns, but most sites have computers. VITA/TCE is the third largest tax preparer in the country.



TCE has been very successful because they are sponsored by the AARP Foundation.

From an IRS standpoint, the VITA program participants need to find their own sponsors. IRS Stakeholder Partnership Education and Communication (SPEC) used to provide support to VRPP, but they no longer have the resources to support us. The problems occur as some sites do not have partners and are becoming frustrated. McQuin said parts of the country have wonderful support from SPEC to find partners, and others that don't get so involved. There seem to be a variety of reasons for this.

Duquette stated less than 4% of the people who have returns prepared at a VITA site go out and get a Refund Anticipation Loan (RAL) after their return is prepared. The number one and number two preparers in the country sell RALs to 90% of their customers. Duquette shared that the Commissioner knows that folks who go to VITA sites do not purchase RALs and that is a good thing. He thinks that if VITA could attract more people, more dollars would actually go to the people.

McQuin said the first step of getting the partners will take more resources, but in the long run this will reduce the resources. This needs to be addressed in your recommendation. Martin stated companies used to offer filing as a benefit, but many companies don't recognize it as such. It's just taxes! Duquette did find a partner with the University of Wisconsin. Also went to the local Health and Human Services for the county, and asked them for support and they jumped on board. Miller said they got their local university to donate space and computers. We found when they apply for grants they get credit for supporting this. Miller stated someone in the IRS needs to make a decision that they will help VITA. Martin relayed that SPEC has more employees than ever and they have not moved forward.

Behnkendorf thinks the two most critical points are: partners and selling it. Broniarczyk said what TAP needs to say is the IRS should be responsible and take some leadership. Miller stated it's not just dollars but sites need someone to take on the administrative issues. Martin noted that the IRS has 100,000 employees but less and less of them volunteer each year. As an organization IRS does not value this service. Duquette stated IRS tends to throw more bureaucratic things at the VITA sites; however none of them benefit the people who use VITA. People also don't get recognized for volunteering anymore. Miller said if IRS doesn't do something to correct this, you will start losing volunteers.

ACTION: Chowning and O'Donnell will rewrite the VITA recommendation and send to Robb to forward to everyone in the Area 4 Committee before the July 25 meeting.

- **Issue Review-Schneider**
Subcommittee did not meet in the last month. We will meet and look at the issues we have to date and will choose the best ones to work.
- **Forms and Publications-Meister**
We met on the four issues assigned. We have some recommendations for 3488, 3763, 3718, and 3705. These have to be developed and put into the proper format. Subcommittee is also working on 3694.
- **Customer Issue--Behnkendorf**
No report today. Have been looking at three issues but haven't come to any decisions and still need to ask for more research.

TAP Reports--Delzer

To manage all the issues coming in, with the help of the Joint Committee, we came up with the Primary/Secondary Categories for Issues. When an issue comes in via telephone, letter, or outreach, the analyst assigns a category. The issue number is assigned randomly by the computer and is not necessarily consecutive as the database is on a shared server. Just because an issue is old, does not



mean it should be worked or is being worked. The date of contact tells you when the issue actually came in.

Each month two reports are run; Contact History Report and the List of TAP Issues for Area 4. The Contact History Report has the new issues listed first and then the issues in the parking lot. Issues can be new, active, parking lot, or closed status. The List of TAP Issues for Area 4 includes will only be parking lot and active issues. Toy compiles a comprehensive report for the Joint Committee of all issues.

Schneider asked for a report of all elevated issues for Area 4. McQuin said anything that is listed as elevated means it was elevated to the Joint Committee. The Joint Committee tracks the status of all issues that have been elevated. Hafer and Schneider would prefer a list of every issue out of Area 4 so they know what happens to each one. Schneider is concerned he is missing actions on these issues.

These reports have been "designed" by the Joint Committee. The list of new issues to choose from can be found in the Contact History Report for Area 4. The List of TAP Issues Report shows all the issues everyone is working on throughout all of TAP, including the Issue Committees. TAP members want to know what are my active issues, and what issues do I have to work on. Chowning would like a list of active issues listed like the Contact History Report. If I have input on an issue, I would like to be able to go to the Contact List and see the details.

Schneider said on the Contact History Report the number is the Contact ID; on the List of TAP Issues for Area 4 the number is the Issue #. This title should be consistent as this is confusing.

New Issue Review

3748 – this issue was initially sent to the TAC Committee and they decided they were not going to work this issue so changed the status to "new" and that is why it showed up on the new issue list. Check to see if can be forwarded to TAB. Active.

3816 – this is a problem but is it big enough to tackle? If the instructions are so vague that the taxpayer cannot figure this out, there is a problem. Richardson said the form is not usually too difficult to complete, unless you run into an unusual situation. The Issue Review Subcommittee will download the form and instructions and discuss on their next call. Martin suggested looking at the new draft forms to see if the problem has already been fixed. Active.

ACTION: Delzer will check with the analyst responsible for the Form 2210 to see if it has been updated.

3817 – Customer Issues Subcommittee will research this issue. Active

3818 – Close – Has been addressed by TAP to the Commissioner.

3828 – Close

3864 – Combine with issue 3728 and close both issues.

3865 – Parking lot.

3964 – Active—check to see if can be forwarded to TAB.

3645 – Close



Duquette asked how a pre-filing agreement or private letter ruling is a systemic problem. McQuin stated these sorts of things are something that a CPA can raise through another channel.

Saturday, July 15, 2006

Welcome/Announcements/Review Agenda

Schneider welcomed everyone to the meeting again.

Public Input

None.

Subcommittee Work

Forms and Publications - Meister

Issues 3488 and 3705. We came up with some recommendations but now we need to write up to fit the format required. Several committees have OCR (Optical Character Recognition) issues and the Joint Committee has formed a subcommittee to put these together. Schneider recommends that when a taxpayer goes onto the internet to download an OCR form, the form should pop up with a watermark and then a screen should pop up saying you cannot download this form. You must call this number ##### to order the form, or please include your name and address in this message and we will send you the forms. Hurr recommends that since you cannot download these forms; make the link to order the forms direct. When you open the form on irs.gov, a warning appears to indicate that you can not download the form, but it does provide a link for further assistance. This link should take you right to the on-line order form, not back through the general form information.

ACTION: Schneider to contact J.T. Wright about Area 4's recommendation regarding the availability of OCR forms.

Issue 3718 and 3763 – Looking at whether there should be a checkbox on the form that people can check saying that they want to get a paper tax package even though they filed electronically or through a practitioner. IRS does have a Community Based Outlet Program. IRS is targeting credit unions, grocery stores, etc., to have these forms available. The OCR forms must be purchased, they cannot be copied. Forms W-2/1099's etc. are available in January of the current year. Forms 1040 are available after December 1. We think IRS should encourage people to order their needed forms early. The IRS should contact these people please (via the same way they filed; paper, email) and tell them note on their calendars to order all our required tax forms by December 15. Some people who file electronically still get the paper tax packages mailed to them. Some people, who file via paper, do not get them. What determines who gets what? Some of the elderly think they don't have to file because they didn't get the packages.

If a checkbox at the top of the form is not possible, somehow communicate with a card with that same information. Check the box on the card and mail back. Duquette stated the problem with a card is that when the IRS gets it back, they have to enter all the information somewhere. You will also get pushback from the IRS about putting another line on the 1040. Has the IRS ever tested a process where people requested forms?

McQuin said IRS would have to reprogram. Years ago people who didn't need forms used to call and complain when they got them. There was a way to enter something on the system to check and that would stop that. Don't let the fact that the form of the 1040 is too full or think the IRS will say no stop you. They are revising the 1040 so now is the time. Should not mix business and individual on one recommendation. They are actually separate issues.



Martin reminded the members that one third of the people in the US move in a year. That in it self can be a problem. Probably should just send to the 1040 filers instead of everybody. It would be too much to send to everybody. You need to find out why the IRS stopped sending the cards in the first place. They had the necessary data at one time.

In conclusion, Area 4 will recommend that all previous year's individual tax filers will be sent a card at their most recent filing address noting that any forms you need will be available on December 1. This card would be sent to all individuals who filed the previous year – not corporations or businesses.

ACTION: Delzer will research why the IRS does not send filing reminder cards to taxpayers as they have in the past.

ACTION: Delzer will send out the draft recommendations on forms and publications to Area 4 members. All comments should be sent to Hurr and Meister.

3694 – Miller – haven't made a whole lot of progress on this issue as of yet. We have ordered the requested publication and we haven't received it yet. They are still looking for more information before they can come to write a recommendation.

3706 – This is an issue being looked at by the Customer Issue subcommittee. Delzer has been doing research on this issue for the subcommittee.

2971 – This is an issue being looked at by the Customer Issue subcommittee. Delzer has been doing research on this issue for the subcommittee. Currently you have 10 days after April 15 to re-submit a rejected e-filed tax return. Duquette could go along with recommending 20 days instead of 10 days. Chowning would like the IRS to publicize that you can file in January if you owe taxes and still don't have to pay until April 15.

3761--Innocent Spouse, was sent to SB/SE and they did not work it. Area 4 to put the issue back into active status

Schneider asked why TAP is not getting hits on www.improveirs.org. McQuin said we are getting hits, but people are not leaving comments. It is very difficult to get the word out about our website unless you do it through Outreach. Miller said he has done a lot of Outreach but has not gotten any input. It seems that individuals don't really seem to have a lot of interaction with the IRS. Larry Behnkendorf said most things he has run into are legislative issues. Broniarczyk said he hears only individual problems. McQuin said when we used to do the Tax Forums, all we talked to were practitioners and there is so much confusion between TAP and TAS. We spend more time explaining the difference and people don't want to talk to us, they usually want to talk to TAS. We could try to get our brochure into the bag of things handed out by TAS at the Forums.

Outreach Reports/Communication Strategy

It's important to turn in your outreach reports after each outreach. That information is rolled up into the annual report. If you see a good outreach possibility, let us know. We do have an outreach budget. We can get a booth or a table at a good cost or no cost for some of these events. Martin suggested that the LTA's talk about TAP when they go on the Hill in January to deliver the National Taxpayer Advocate's annual report. The main focus of the meetings is to be the annual report, but it would be a good thing for a TAP brochure to be delivered.

Office Report--McQuin

Recruitment – thanks to everyone who helped with recruitment. I think you can all attest that the quality of people has improved significantly. We only selected the very top to interview. There was a higher percentage of people who were more knowledgeable about TAP. When the members are selected, the list will be shared so you can contact them before the annual meeting.



Schneider mentioned that Area 4 was almost the last area to have their face-to-face meeting. It was discussed at the Joint Committee meeting that the staff will determine the dates for the face-to-face meetings next year and the meetings will probably be in February, March, or April. McQuin said part of the reason for that is that it really impacts the staff. Authorizations have to be done, travel arrangements need to be done, vouchers need to be done, and many other things to prepare before and after the meetings. The issue committees need to be treated a little differently as it depends on when the program owner needs assistance.

Miller feels each committee should have flexibility.

Chowning stated with having a December face to face meeting, really could have a later meeting. No reason not to have one four, five, or six months down the road.

Schneider asked if issue committees should have two day meetings. Do they have more to do than the area committees?

McQuin the length of the issue committee meetings will be driven by the Program Owner.

Meister stated having the second meeting six months after the first one is ideal. It really helped us work and gave us time to flesh out our issues.

Chowning recommended that it would be better to give the committees time allotments in two week blocks.

Duquette reminded the staff to cross off any holiday weeks.

Behnkendorf said he does not like meetings that start after lunch. It's hard to get up early and travel and then have to attend the meeting.

McQuin reiterated members prefer to have two full days or a day and a half meeting and start the first day in the morning. Members also prefer to fly home in the evening after the end of the meeting rather than fly in the morning before the meeting.

ACTION: Robb will check with SATO to see if they can ask the airline to notify the panel member if a flight has been delayed or cancelled.

Meeting Adjourned



**Area 4 Committee Meeting Minutes
Conference Call
June 27, 2006**

Designated Federal Official

- Betty Martin, Local Taxpayer Advocate (LTA)

Committee Members Present

- Rashidah Abdulhaqq, Ohio
- Maureen Amos, Illinois
- Larry Behnkendorf, Michigan
- Robert Broniarczyk, Illinois
- Donna Hafer, Kentucky
- Joe Hurr, Ohio
- David Meister, Wisconsin
- Jerry Melchior, Indiana
- Lovella Richardson, Tennessee
- Ferd Schneider, Ohio

Committee Members Absent

- Kimberly Chowning, Indianapolis
- Paul Duquette, Wisconsin
- Steve Hoffman, Ohio
- Mary Ann Lawler, Michigan
- Don Miller, Tennessee
- Marie O'Donnell, Illinois
- Allen Scioli, Michigan

TAP Staff

- Sandra McQuin, TAP Manager
- Mary Ann Delzer, Program Analyst
- Patti Robb, Secretary

Visitors

- Teresa Smedley, former TAP member

Welcome / Roll Call

Ferd Schneider welcomed everyone to the call. Quorum met.

Chair Report:



- **Approve Minutes of May 24, 2006**
Minutes approved by consensus.
- **Joint Committee Report**
The Joint Committee had a conference call on June 7. The annual meeting is scheduled for the week of December 11-14, 2006. It will be held at the Capital Hyatt again which is the same hotel as last year. Monday will be a travel day – either morning or afternoon depending on when you are required to be there. The agenda is still in the planning stage.

It would be best to block that whole week for the annual meeting.

The Joint Committee is meeting face-to-face in Denver at end of this week.

The town hall meeting was a success. Donna Hafer, Jerry Melchior, Joe Hurr, and Ferd Schneider were there to represent TAP and host the event. About 25 people attended and we got some good publicity. Three people who attended the town hall meeting applied to be a panel member and were interviewed.

- **Chicago Agenda**
If anyone has an issue for the agenda or would like a speaker on a particular issue, please contact Mary Ann Delzer. Subcommittees will have break out time at this meeting. The meeting will run 8:30 am to 4:30 pm on Friday, July 14, and 8 am to Noon on Saturday, July 15, 2006.
- **VITA Report for the Commissioner**
As you probably remember, several members of the Joint Committee met with the Commissioner in April. He wanted input from TAP on five issues. One of the issues is the future of VITA. The VITA issue committee is looking at training issues, so Area 4 has been assigned to work on this VITA issue. Maureen Amos wrote the Area's initial draft. It was revised and sent out to everyone for their comments. The final report should be about two pages long. The Joint Committee was hoping the report would be ready by their scheduled face-to-face meeting at the end of this week, but I told them we won't be able to finalize it until our face-to-face in Chicago. We can send it to the Joint Committee right after that. Schneider asked everyone to do a little more homework and be ready to discuss this issue in Chicago so it can be finalized. He would like everyone to have input.

Public Input

Teresa Smedley, a former TAP member and Chair of Area 4, said she wanted to be active in working with the current members. She has asked if former members could re-apply to be panel members again as she is interested. Schneider said he will bring this issue up at the Joint Committee face-to-face meeting in Denver. There is nothing in the handbook that specifically addresses this issue. He will get back to Smedley to let her know what is said in Denver.

Subcommittee Reports

- **Issue Review - Schneider**
The subcommittee did not meet this month. We received a list of new open issues. We wanted to set up a call but there didn't seem to be a lot of interest right now. Hopefully we will have more to discuss in Chicago next month. We are not actively working any issues at this time.
- **Forms and Publications - Meister**
We have not done anything yet as we are still gathering information. We have now received



information in response to our requests and will be able to get to work in Chicago. There is nothing to report but now, but we have the information to get busy.

Schneider noted that last month we agreed to elevate issue 3670, Forms, Issues, and Publications, on draft forms. In it we recommended that the when the IRS posts these draft forms, they needed to indicate what was changed. Joint Committee review subcommittee suggested a few changes. Toy sent a revision with the requested changes to Schneider. Delzer felt the changes made did not alter the original intent. If we accept their changes, the Joint Committee can discuss during the face-to-face and, if approved, can send forward. Consensus to elevate.

- **Customer Issue - Amos**

The subcommittee will work on this issue in Chicago. Delzer sent out some statistical information so there is more discuss.

Outreach required reporting / Communication Committee - Amos

The Communications Committee wanted to send out a reminder about the importance of accuracy in reporting outreaches. More specifically the number in attendance. One outreach reported that they spoke to a group, and yet the number of people showed a zero.

Delzer said the town hall will not be reported as an outreach if the Joint Committee decides to have a separate section in the annual report. They will discuss the annual report format at their meeting this week.

ACTION Item Review

All action items were completed; however Delzer did not receive any agenda items for the Chicago meeting.

Office Report – Recruitment

McQuin reported that she has been interviewing since last Tuesday and would like to thank Amos, Broniarczyk, Duquette, Hafer, Melchior, Richardson and Schneider for their help. We have interviewed 29 people for Areas 4 and 5. We need three people in Area 4, and there are six vacancies for alternates. In Area 5 we need five people and have five vacancies for alternates. Overall, the interviews have been very high quality.

Schneider asked why we didn't replace members who dropped out. McQuin said it was because Coston wanted to get to the one-third rotation. It was a little difficult but we are at the point where we will now have one-third of the members rotating off every year, so we don't lose all the veteran members in any single year. This will be discussed a little more at the Joint Committee meeting.

All the managers and analysts will be in New Orleans for their CPE the week of July 10, 2006. The secretaries will be in the offices.

Schneider said when we receive the new issues report; they are not in any particular order. Hafer felt they were difficult to keep straight. It seems that some of the new issues have dropped off the list. Where did they go? Are they in someone's parking lot? It appears that each committee may have their own parking lot.

Delzer said active issues can be seen on the "TAP Issue List" and all issues listed as "active," are actively being worked. Delzer runs a report each month that shows the NEW issues that came in that month first, and then the parking lot issues. Schneider said it is up to the committee to review and clean out the parking lot.

The next meeting is July 14-15, 2006, in Chicago at the Hotel Indigo.



We will plan to have our regularly scheduled conference call on Tuesday, July 25, 2006, at 11:00 a.m. CDT, 12: p.m. EDT.

Larry Behnkendorf said Coston told them (at their issue committee meeting) that he wanted the committees to stay active and not lapse in action. He would like to see the committees schedule regular meetings through November.

Meeting adjourned.



**Area 4 Committee Meeting Minutes
Conference Call
May 24, 2006**

Designated Federal Official

- Betty Martin, Nashville Local Taxpayer Advocate

Committee Members Present

- Maureen Amos, Illinois
- Larry Behnkendorf, Michigan
- Robert Broniarczyk, Illinois
- Paul Duquette, Wisconsin
- Donna Hafer, Kentucky
- Joe Hurr, Ohio
- David Meister, Wisconsin
- Don Miller, Tennessee
- Marie O'Donnell, Illinois
- Lovella Richardson, Tennessee
- Ferd Schneider, Ohio

Committee Members Absent

- Rashidah Abdulhaqq, Ohio
- Kimberly Chowning, Indiana
- Steve Hoffman, Ohio
- May Ann Lawler, Michigan
- Jerry Melchior, Indiana
- Allen Scioli, Michigan

Staff

- Mary Ann Delzer, Program Analyst
- Patti Robb, Secretary

Welcome / Roll Call

Quorum met.

Chair Report:

Approve Minutes of April 25, 2006

The minutes were approved by consensus.

Joint Committee Report

The bulk of the meeting was devoted to TAP's meeting with the Commissioner. There are several issues the Commissioner wanted TAP to address.

1. Section 7216 regulations (selling taxpayer information)



2. Return preparers regulations (licensing)
3. The direction of VITA/TCE (as TAC offices decline, what role are VITA/TCE going to serve)
4. Private collection agencies (parceling out of "old" debts to collect on behalf of the IRS)
5. The availability of "Free-file" for taxpayers (this year, the ceiling was cut back)

VITA Report for the Commissioner

Regarding the VITA / TCE issues, Larry Combs asked that the area committees respond to the commissioner rather than the VITA Issue Committee, and so Area will own this report. As a result of the Area 4 VITA subcommittee last year, the IRS decided to have a VITA Issue Committee this year. This report should not be a burden as the work has pretty much been done during the VITA face-to-face meeting a few weeks ago. Don Miller suggested that the minutes from the VITA meeting be forwarded to the Area 4 members for their review. We can review and put something together at the Area 4 face-to-face meeting. Schneider felt this suggestion valid, as we have to educate ourselves before we can respond. Miller still has information from the subcommittee work and will send to all members. Delzer suggested the draft report be shared with all TAP members to review before finalized. Schneider felt the response would almost write itself with all the information coming out from the VITA meeting.

Duquette requested to see all the information, as an Area Committee should come up with an independent response. It may not be the same as what the VITA committee is doing today. Commissioner is looking for how to expand VITA. His comment to my questions at the meeting is that he is willing to spend money. He realizes that better software and support is needed and is willing to do this. VITA will not take the place of TACs, but it has the ability to grow and expand as the countries population changes. Currently the majority of TACs are located on the east and west coast, but the population is growing in SW and S. IRS can support VITA with less cost as opposed to new TACs. He wanted our ideas as to how we see this expanding. Think about; it is possible to train volunteers to answer questions on the phone? Is it possible to open more VITA sites in partnership with other government agencies such as county agencies? Would they be supportive and how would they support the people they are already serving. The Commissioner is looking for other partners. One of his concerns are the Refund Anticipation Loans (RAL). He was not happy that over 60% of low income people who go to preparers take out a RAL. Only about 4% do the same when VITA prepares their returns. That is a huge discrepancy.

Delzer suggested that a lead be chosen to write this report. Maureen Amos agreed to prepare a draft that can be used to build on. The report format will be forth coming from Combs.

ACTION: Delzer will forward the May VITA meeting minutes when available to all members of Area 4.

ACTION: Miller to send all Area 4 members research done last year by the VITA subcommittee.

ACTION: Amos to prepare a draft report for the June 27 Area 4 meeting.

Issues to elevate by June 29

The Joint Committee would like to know how many issues each Area hopes to complete by June 29, for agenda purposes for the their face-to-face meeting. Schneider advised them that Area 4 would have no more than five issues.

Chicago Agenda

Travel to Chicago will be on July 13. The meeting will be July 14, 8 a.m. to 4:30 p.m. and on July 15, 8 a.m. to noon. All will travel home the afternoon of July 15.

ACTION: Area 4 members to forward agenda items for the Chicago meeting to Delzer.



Public input

None

Subcommittee Reports

- **Issue review--Schneider**
Subcommittee did not meet since last Area 4 meeting. Delzer was asked to send out a list of all open issues. Still looking for someone to take the lead for this subcommittee. We need to pick an issue this subcommittee can work.
- **Forms and pubs--Meister**
Still collecting data on several issues. Hurr and I were at the Detroit Notices face-to-face meeting. IRS was very supportive and we were surprised at how involved TAP is in this area. They seemed impressed with TAP. Very productive meeting and we go a lot done. IRS realized that they could utilize us.

Miller presented an issue to elevate. Miller sent a copy to all committee members, issue #3670, Forms Draft Changes on May 20. IRS posts drafts for input. When IRS posts, there is no indication as to what was changed from the original form. You have to find a copy of the original form to compare. We recommend that the IRS highlight what was changed. According to the research Delzer prepared, this is not a new issue. IRS stated additional resources are needed to highlight changes. We feel the IRS needs to make it easier for folks to identify where changes occurred. We recommend they reconsider the idea and find a way to highlight changes on the form. Behnkendorf is on the Burden Reduction Committee, and are working on Form 8857, Innocent Spouse, and the form has been totally re-done. When you get beyond minor changes it would not be appropriate. This proposal is directed toward limited changes. Duquette said this should pertain to revisions of current forms. Schneider said a lead-in paragraph identifying where the changes are being made would be helpful. Duquette said IRS's response is this is aimed at the software vendors. The vendors don't care about the substance of the form, (in other words the Why's of the change) but rather they care about the format they must include in their programs.

Consensus to elevate issue.

ACTION: Delzer will format the recommendation regarding Draft Forms Changes and send forward to Toy for Joint committee consideration.

- **Customer issue-Amos**
Subcommittee met briefly and agreed that issues needed more research. Committee discussed three possible issues: time period to file an electronically filed return after it rejects on April 15th, IRS's loss of Form 8453, and the inconsistencies of Fed/State agreements. The Federal government negotiates with each state as to how they want to get audit reports.

Outreach

Behnkendorf and Lawler attended the Dearborn Women's Center. Many other government agencies have tables at these expos. If you are familiar with any of these expos, you should pursue attending. Delzer stated TAP does have money for these outreaches. She can contact these places and try to negotiate a reduced price of a booth or a table.

ACTION Item review

Delzer will follow up concerning the biography template issue to be considered by the Communication Committee. Action to be carried over to the next meeting. Will speak to Steve Berkey expressing the need for a template.



Office report--Delzer

Applications will be ranked next week and the Area 4 applicants will be interviewed the week of June 19. If you are interested in participating, please let McQuin know of your availability. All will be telephone interviews and the procedures for interviewing will be shared. Broniarczyk is available to help.

Town hall at Xavier University in Cincinnati, on June 6. Schneider, Hafer, Hurr and Melchior will all be attending. If you have people you would like to invite to the event, please send Delzer the contact information.

New Issues--Schneider

Issue Review Committee did not have time to review, but will contact members to set up a call. Sheer number of issues is overwhelming, but need to take the ones that seem more fruitful. If it is a specific taxpayer issue, we cannot work. We work systemic and general issues that affect many taxpayers. Would be nice to work every issue but not possible. Must be somewhat selective. The VITA response to the Commissioner has priority over our regular issues .

Delzer shared that Area 5 has the Free file issue and two issues fall into this area. Delzer will send issues 3863 and 3806 to Area 5.

Area 2 just forwarded the 1099 issue and so that can be closed. Issue 3916 can be sent to the TAC Committee.

Regarding issue 3901, this form can be filed. It is true that some software vendors do not offer all forms.

ACTION: Delzer will forward an updated issue list and will also note the disposition of each issue. Delzer will request the reports be run in numerical order or by date of contact. Preferably in numerical order.

Meeting adjourned.
Next meeting is June 27, 2006 at 11 CT.



**Area 4 Committee Meeting Minutes
Conference Call
April 25, 2006**

Designated Federal Official

- Betty Martin, Nashville Local Taxpayer Advocate

Committee Members Present

- Larry Behnkendorf, Michigan
- Robert Broniarczyk, Illinois
- Paul Duquette, Wisconsin
- Donna Hafer, Kentucky
- Steve Hoffman, Ohio
- May Ann Lawler, Michigan
- David Meister, Wisconsin
- Jerry Melchior, Indiana
- Marie O'Donnell, Illinois
- Lovella Richardson, Tennessee
- Ferd Schneider, Ohio

Committee Members Absent

- Rashidah Abdulhaqq, Ohio
- Maureen Amos, Illinois
- Kimberly Chowning, Indiana
- Joe Hurr, Ohio
- Don Miller, Tennessee
- Allen Scioli, Michigan

Staff

- Sandra McQuin, TAP Manager
- Mary Ann Delzer, Program Analyst
- Patti Robb, Secretary

Welcome / Roll Call

Quorum met.

Approve minutes of March 28, 2006

The minutes were approved by consensus.

Joint Committee Report

The Joint Committee had a conference call on April 4. Area 2 forwarded two recommendations to the Joint Committee. They were approved and forwarded.



- **Consolidation of Schedule D and D1**
Area 2 consolidation of Schedule D and D1 does not apply for corporate taxes. This addresses individual taxes only.
- **Area 2 – Timely Response required on Envelopes**
Chair Ferd Schneider noted that we need to get something done on our issues so they know we are working.

The Joint Committee solidified their two face-to-face meetings. The first one is June 29 to July 1, in Denver, Colorado. The second one will be October 11-14 in Dallas, Texas. We will work on planning the annual meeting while in Dallas. The annual meeting is currently scheduled for the week of December 11 in Washington, D.C.

Paul Duquette said he spoke to TAP Director Bernie Coston about letting prior TAP members rejoin TAP and what procedures would need to be followed. Coston is going to do some research before making a determination.

Public input

None

Subcommittee reviews

- **Issue review** – Ferd Schneider
The subcommittee has ten new issues to review. Did not get a chance to get together yet. They felt they should be assigned to one of the other subcommittees as well as this one as they will not be busy all the time. Once they review the new issues, they will choose one of them and run with it so the Area will have three subcommittees working issues.
- **Forms and Publications** – David Meister
The subcommittee divided in two work groups to address more issues and research has been requested from Delzer. Subcommittee will meet again when research received.
- **Other** -- Larry Behnkendorf
Behnkendorf, Maureen Amos, Paul Duquette, and Delzer had a meeting. Suggestion made to become "Customer Issue" subcommittee. Members requested research from Delzer regarding issue sharing between the States and the IRS.

ACTION: Delzer will update the Area 4 issue matrix and email to Schneider before 5-5-2006.

Meeting with Commissioner – Paul Duquette

Duquette said the meeting began poorly. The Commissioner seemed to display a lack of understanding of TAP. He was under the impression that we were a duplication of Taxpayer Advocate Service. We told him we agreed with some of the National Taxpayer Advocate's top 20 items in her report to Congress. He said he sees Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) sites as valuable to the IRS and felt they could assist customer service in the IRS. He said there would be no new Taxpayer Assistance Centers (TAC) opened as they are too expensive to set up and maintain. He would like to see VITA and TCE grow and is willing to spend money to help make it happen. For every dollar spent, it multiplies itself. The 7216 Regulations, sale and use of taxpayer information, was discussed and he asked our opinion. The Joint Committee will wrestle with that. Also talked about the Free File portal. The \$50,000 limit came about when the Senate passed a resolution advising the IRS to keep their hands off and not develop tax software on their own. The Commissioner is interested in learning about TAP's opinions on five issues:



1. 7216 Regulations, sale and use of taxpayer information
2. Return preparer regulation
3. The direction of VITA and TCE
4. Views on private collection agencies
5. The availability of Free File

Brubaker is working on consolidating the information from the meeting with the Commissioner and he will send it out to all TAP members.

Office Report – Sandy McQuin

- **Recruitment**

We are in pretty good shape as far as applications in Area 4. She sent out an email to see if you are available to help interview potential panel members. She will let you know the dates for sure as the time approaches. We will be ranking the application packages a week or two later than originally planned so that will push the interviews back a week or so.

- **Area 4 Town Hall Meeting**

The town hall meeting is scheduled for June 6, in Cincinnati, Ohio.

Cathy Van Horn, Cincinnati Local Taxpayer Advocate, will help us find a good place to have the meeting. But if you have any ideas or suggestions, let me know. Your input would be appreciated. NTA Nina Olson talked about focusing on the small business community for this town hall meeting. It is on her calendar and she plans to attend. McQuin noted there are four Area 4 members in Ohio and Donna Hafer is just across the river in Kentucky. We would like four members, but no more than five to attend. It depends on who is available.

As you know, the Milwaukee office is moving at the end of April. Patti Robb will send out new rosters with our new address and telephone numbers.

Delzer reported that Burt DuMars is going to be looking for stakeholder input regarding Refund Anticipation Loans (RALs). Area 4 sent their recommendations forward last year. He is looking for input from different stakeholders and TAP is one of them. When the questionnaire is received, Delzer will email it to you. Please look at it and send your feedback. She will consolidate the comments and send them forward. This is a big opportunity for TAP. Behnkendorf suggested that Joe Meissner be included since he was so passionate about this issue.

Schneider said we need to be thinking about the agenda for the meeting in Chicago in July. Maybe we could use some of the time to get educated by the IRS on any topics they identify. A while back the IRS was testing a new system on adding the 1040EZ. He was curious about the results. That may be something you would be interested in hearing about.

McQuin said one good thing is it's the week of the tax forum and a lot of IRS people will already be in Chicago. Maybe we could identify a topic that one of them could address as a subject matter expert.

Delzer offered to do help members with TAPSpeak if anyone would be interested. Schneider thought that would be helpful. He had trouble uploading a picture for his biography. Duquette was under understanding that someone would put together a template for the bios for everyone to follow. Many people are not sure what should be included. Behnkendorf thought that would be a good thing for the communication committee to look at.

ACTION: Delzer will follow up with the biography template issue going to the Communication Committee.



Staff cannot put your bio on TAPSpeak; you need to input your own. McQuin will check with Steve Burkey about adding the pictures that were taken at the annual meeting last year.

Schneider asked for everyone to send their ideas for the Chicago meeting to him. Schneider and the staff will include these items in the agenda.

Reminders – the next meeting will be on a Wednesday, May 24, 2006, at 11 a.m. CT/ 12 p.m. ET.



**Area 4 Committee Meeting Minutes
Conference Call
February 28, 2006**

Designated Federal Official

- Betty Martin, Local Taxpayer Advocate (LTA)

Committee Members Present

- Larry Behnkendorf, Michigan
- Robert Broniarczyk, Illinois
- Kimberly Chowning, Indianapolis
- Paul Duquette, Wisconsin
- Steve Hoffman, Ohio
- David Meister, Wisconsin
- Jerry Melchior, Indiana
- Don Miller, Tennessee
- Marie O'Donnell, Illinois
- Ferd Schneider, Ohio

Committee Members Absent

- Rashidah Abdulhaqq, Ohio
- Maureen Amos, Illinois
- Donna Hafer, Kentucky
- Joe Hurr, Ohio
- Mary Ann Lawler, Michigan
- Lovella Richardson, Tennessee
- Allen Scioli, Michigan

TAP Staff

- Sandra McQuin, TAP Manager
- Mary Ann Delzer, Program Analyst
- Patti Robb, Secretary

Visitors

- Karen Sheely, Indianapolis, Local Taxpayer Advocate
- Selma Taylor, Chicago, Local Taxpayer Advocate
- Marilyn Luster, Cincinnati, TAS

Welcome / Roll Call

Ferd Schneider welcomed everyone. This is the first conference call for Area 4. The focus today will be to create and populate subcommittees. Quorum met.

Welcome David Meister and Jerry Melchior

David Meister – Franklin, Wisconsin. Recently retired from the insurance business but the majority of his time was spent as a CPA.



Jerry Melchior – Vincennes, Indiana. Spent about seven years in a seminary studying to become a priest, then he went into medicine. Went to Vietnam and has been an Urologist for thirty-one years.

Approve minutes of January 12, 2006

Minutes approved by consensus.

Joint Committee Report

The Joint Committee is made up of all the chairs of the issue and area committees, as well as the overall TAP Chair and Vice Chair. Chair training was held in San Diego on Thursday, February 9. It was held in conjunction with the Town Hall meeting. The training was very good. The Joint Committee has not met as a committee yet. It has been decided that the annual meeting will be held in November this year. It is tentatively planned for the week of November 13, 2006. More information will be coming out.

Public Input

None.

Assignment of Members / Review of Subcommittee and Chair Responsibilities

Some committees have defined an emerging issues subcommittee to look at new issues. They will then make a recommendation to the full committee as to whether the issue will be worked, dropped, put in the parking lot, or that it is a legislative issue. Schneider recommended Area 4 do the same thing. The bulk of our issues seem to fall under the heading of Forms and Publications.

Issue Review

- Ferd Schneider, Lead first meeting
- Bob Broniarczyk
- Jerry Melchior

Forms and Publications

- Don Miller, Lead first meeting
- Steve Hoffman
- David Meister

Other

- Larry Behnkendorf, Lead first meeting
- Kimberly Chowning
- Paul Duquette

ACTION: Delzer will assign members not in attendance to subcommittees. Will tell them if they really have an interest in one of the other subcommittees, they can change.

ACTION: Subcommittee leads should schedule teleconferences with their Subcommittees as soon as full Subcommittee membership is known.

Outreach

Outreach is primarily an area committee duty.

ACTION: Remember to send all outreach contacts to Delzer. She will add them to the database. It is important to capture this information as it goes into the TAP annual report. Also, if you are going to incur any expenses, you must get permission from the office first.

You can request outreach materials (pens, notepads, bookmarks, etc) from the office. There is also a PowerPoint presentation available. Delzer will modify it to fit your needs.

Office Report

We are approaching recruitment. It is supposed to begin in Mid-March and run through the end of April. The application will be on the website.



TAP will not be attending the Tax Forums this year. It was a budgetary decision and actually not worth the time and resources. Very few issues came from the forums. The Area 4 face-to-face meeting was piggybacked onto the Chicago Tax Forum, so you need to decide if you still want to keep the place and dates. The meeting is currently scheduled for July 13-15, 2006, in Chicago, IL. It was decided to keep the dates and to have the meeting in Chicago. Robb will start looking for hotels and meeting space.

Town Hall Meeting

A determination needs to be made if a town hall meeting will be held in Area 4. National Taxpayer Advocate Nina Olson is unable to attend the Area 5 Town Hall meeting as she has been called to testify on the Hill, however, she is going to record a video to introduce Chris Wagner, Deputy NTA, who will be there in her place.

ACTION: McQuin will ask Coston to speak to Olson about possible dates for a Town Hall meeting in Area 4.

Action Items

All Members

- **Remember to send all outreach contacts to Delzer. She will add them to the database. It is important to capture this information as it goes into the TAP annual report. Also, if you are going to incur any expenses, you must get permission from the office first.**
- **Delzer will assign members not in attendance to subcommittees. Will tell them if they really have an interest in one of the other subcommittees, they can change.**
- **McQuin will ask Coston to speak to Olson about possible dates for a Town Hall meeting in Area 4.**