

## 2011 Meeting Minutes Area 4

- September 20, 2011
- August 16, 2011
- July 19, 2011
- June 21, 2011
- May 17, 2011
- April 19, 2011
- March 15, 2011
- February 15, 2011
- January 18, 2011

### Area 4 Committee Teleconference 1:00 p.m. CT / 2:00 p.m. ET September 20, 2011

#### Designated Federal Official

- Wess, Donna    Memphis, TN    Designated Federal Official

#### Committee Members Present

- |                          |                 |            |
|--------------------------|-----------------|------------|
| • Akbar, Sandra          | Chicago, IL     | Member     |
| • Eng, Harry             | St Charles, IL  | Vice Chair |
| • Granger, Jackie        | West Bend, WI   | Member     |
| • Hayden, Robert         | Monroe, MI      | Member     |
| • Kelly, Eileen          | Wilmette, IL    | Member     |
| • Mackie, Wayne          | Frankenmuth, MI | Member     |
| • Oetken, Todd           | Louisville, KY  | Member     |
| • Petersen-Grosse, Chris | Elkhart, IN     | Member     |
| • Wechter, Thomas        | Glencoe, IL     | Member     |
| • Werner, Mary Jo        | La Crosse, WI   | Chair      |

#### Committee Members Absent

- |                    |                |        |
|--------------------|----------------|--------|
| • Brandewie, Shaun | Sidney, OH     | Member |
| • Kosanovich, Matt | Columbus, OH   | Member |
| • Marshalek, Mark  | Powell, OH     | Member |
| • Purkayastha, PK  | Saline, MI     | Member |
| • Rhyhan, Joyce    | Cleveland, OH  | Member |
| • Vanderver, Steve | Evansville, IN | Member |

### **TAP Staff**

- |                 |               |           |
|-----------------|---------------|-----------|
| • Block, Roy    | Milwaukee, WI | Manager   |
| • Smiley, Ellen | Milwaukee, WI | Analyst   |
| • Robb, Patti   | Milwaukee, WI | Analyst   |
| • Gabriel, Lisa | Milwaukee, WI | Analyst   |
| • Gold, Annie   | Milwaukee, WI | Secretary |

### **Guests**

- Deneroff, Michael

### **Welcome / Review Agenda (Werner)**

Mary Jo Werner welcomed everyone to the September meeting.

### **Roll Call (Gold)**

Quorum met.

### **DFO Report (Wess)**

Donna Wess said the most common issue for Taxpayer Advocacy Service cases involves Identity Theft. TAS expected a significant decrease in these cases because the operating division is taking on more responsibility. However, there are 80% more cases this year than last year. There are fewer cases involving processing amended returns and open audit cases; however wage verification / fraud has seen a significant increase. Our mainframe system is currently CADE, but we will be switching to CADE II next year. This will allow for refunds being issued on a daily basis next year.

### **Approval of Minutes**

Consensus to approve August minutes as submitted.

### **Area 4 Chair Report (Werner)**

Werner followed up on the DFO report on Identity Theft advising Area 4 had a couple of issues accepted last year that dealt with Identity Theft.

Each Area is required to provide information for the 2011 TAP Annual Report highlighting their achievements. Does anyone have any suggestions? We could highlight the e-filing issue or briefly mention a few of the issues elevated this year. Sandra Akbar suggested including the number of taxpayers each of these issues has affected. Also, the members who volunteered for additional meetings for focus groups or task forces can be listed as an achievement. If you have any comments or ideas, please forward them to Werner.

### **Public Input**

None

## **New Issue Report (Granger)**

### **21826 – National Debt – Create a Line on Tax Forms**

Recommendation from committee is to drop.

**DROP**

### **Outreach**

Werner encouraged everyone to continue with outreach. Outreach is the main source of issues from the taxpayers. Thanks to the members who are committed to doing outreaches. There is a wide variety of outreaches members can participate in. Panel members are the voice to bring the issues to the IRS' attention.

## **Project Committee Highlights**

### **Communications**

Roy Block said the Communications Committee started out with four projects: TAP Handbook, Outreach Toolkit, Bio Book, and the TAP Annual Report. The Handbook will be completed to reflect the changes within TAP. The IRS Toolkit is being updated. The Bio Book will be used as a source document for the panel members. The Annual Report has been completed and printed and should be distributed next week.

### **EITC**

Sandra Akbar said this committee is still waiting for feedback on the recommendations made. Werner noted there is a great deal of fraud in EITC and the IRS should be using the project committee in that avenue. Harry Eng said there are actually two projects: retooling way to communicate EITC information to the public and a PowerPoint Presentation to use when doing speeches to provide information to the public. Chris Peterson-Gross said the delay is underutilizing the work we have done. It is so important they get on this to stop the EITC fraud. Werner asked if EITC is being considered for one of the Project Committees for next year. Block said at this point we don't know if it will be a project as we are waiting to hear from the IRS. Eng said the EITC Committee has been focusing on getting the word out that EITC is available but it should be focusing on addressing the multibillion dollar fraud issue. Block advised Eng to provide his suggestion as an issue. Werner advised she wrote an article for the local paper and a Senator from Ohio contacted her as he was amazed at the size of the fraudulent amount of EITC. Eng will submit an issue.

### **Tax Forms and Pubs**

Bob Hayden said they have received favorable responses from the IRS on their projects for Schedule C and Schedule E. The committee is now working with a focus group to change the Schedule D and is looking at three different versions of Form 8949. They need to decide which version to send forward. This year has been a good one for getting changes done.

### **Notice Improvement**

Jackie Granger said the committee has been contacted by the fraud area of the IRS to work with them to address fraud issues. Granger explained they finished their notices assignments and

were looking for something to work on. The committee is very excited about this new issue. Eileen Kelly said they were also part of a focus group for Tax Forms and Pubs.

### **SBSE Correspondence Exam**

Tom Wechter said they completed their project of reviewing telephonic script. They are now reviewing the videos on small business workshops with a very fast track to finish by the annual meeting.

### **Practitioner Engagement**

Werner said they are finishing their recommendation on notices sent for EITC audits. They are changing the letter to clarify exactly what the IRS is looking for. This should streamline the process so the taxpayer understands what information to provide and does not receive additional requests for information. Each letter should also contain the IRS employee contact information so the taxpayer can contact the person directly.

### **TAC**

Block advised the committee is finalizing their report and recommendations to the IRS. 12 members visited 28 TACs and developed 14 recommendations.

### **VITA**

Will report next month when VITA members are on the call.

### **Office Update (Block)**

The office is extremely busy. This committee has done an excellent job and should look forward to working on new projects next year. If you are planning to do any outreach, please obtain approval beforehand to ensure funds are available.

### **Closing (Werner)**

Werner said PK is working on the rebuttal for the W-4 issue. Ellen Smiley requested a response from all of the subcommittee members in order to move the rebuttal forward.

Werner reminded everyone to send her information to include for the Area 4 portion of the 2011 TAP Annual Report to highlight all of the work members have completed.

### **Meeting Adjourned**

**Next conference call is Tuesday, October 18, 2011, 1:00 pm CT / 2:00 pm ET**

**Area 4 Committee Teleconference  
1:00 pm CT / 2:00 pm ET  
August 16, 2011**

**Designated Federal Official**

- Wess, Donna                      Memphis, TN                      Designated Federal Official

**Committee Members Present**

- Akbar, Sandra                      Chicago, IL                      Member
- Brandewie, Shaun                      Sidney, OH                      Member
- Eng, Harry                      St Charles, IL                      Vice Chair
- Granger, Jackie                      West Bend, WI                      Member
- Kelly, Eileen                      Wilmette, IL                      Member
- Petersen-Grosse, Chris                      Elkhart, IN                      Member
- Purkayastha, PK                      Saline, MI                      Member
- Rhyan, Joyce                      Cleveland, OH                      Member
- Vanderver, Steve                      Evansville, IN                      Member
- Wechter, Thomas                      Glencoe, IL                      Member
- Werner, Mary Jo                      La Crosse, WI                      Chair
- Marshalek, Mark                      Powell, OH                      Member

**Committee Members Absent**

- Hayden, Robert                      Monroe, MI                      Member
- Kosanovich, Matt                      Columbus, OH                      Member
- Mackie, Wayne                      Frankenmuth, MI                      Member
- Oetken, Todd                      Louisville, KY                      Member

**TAP Staff**

- Block, Roy                      Milwaukee, WI                      Manager
- Robb, Patti                      Milwaukee, WI                      Analyst
- Gabriel, Lisa                      Milwaukee, WI                      Analyst
- Gold, Annie                      Milwaukee, WI                      Secretary
- Berkey, Steve                      Plantation, FL                      Sr. Program Analyst

**Guests**

- Walker, Thomas                      Dallas, TX                      Joint Committee Chair
- Kim, John                      Honolulu, HI                      Joint Committee Vice Chair

**Welcome / Review Agenda (Werner)**

Mary Jo Werner welcomed everyone to the meeting.

## **Roll Call – Gold**

Quorum met.

## **Area 4 Chair Report – Werner**

Werner stated the Joint Committee face-to-face meeting held in Seattle, Washington was lively and successful. The committee was looking at recommendations from Nina Olson as she looked at the current Taxpayer Advocacy Panel (TAP) to see how TAP could better serve the taxpayers, collect issues and continue outreach. Werner noted this refocus will better serve the taxpayers. She also spoke of Area 4 achievements. The meeting was turned over to Tom Walker to speak on the TAP Refocus.

## **TAP Refocus Initiative – Walker/Kim**

The TAP Refocus PowerPoint as well as other documents regarding the refocus were sent out as pre-reads. Walker, John Kim, Shawn Collins, as well as Steve Berkey will be on all Area Committee calls as they want to give a 100% clear and consistent message to all committees.

The Joint Committee met in Seattle, Washington from July 25 – 27, 2011. Olson joined the meeting via conference call for an hour and shared her vision on the refocus. One change will be the downsizing of TAP; this was not by choice but due to budgetary constraints. Olson wants to align the TAP Members with the states Local Taxpayer Advocates (LTAs). There will be one TAP member for every LTA location. Members will partner closely with their LTA. This will encourage a one to one relationship between the panel member and the LTA. The panel will downsize through natural attrition, but by 2012 TAP will be down to 84 members and a year later down to 74 members. These changes will begin as of this December. Every state will have at least one representative and will include D.C. and Puerto Rico.

A further comment on Refocus efforts was shared regarding the duplication of issues, the scope of issues, and the work load of TAP. The Joint Committee members discussed how best to deal with these matters. It was the consensus of the Joint Committee members that TAP will use a process to “bucket” issues as there has been a concern about redundancy of issues and working issues outside the charter. “Bucketing” issues will result in larger issues being worked on by TAP members, instead of having many, smaller issues being worked on. “Bucketing” will also eliminate redundancy as similar issues will be looked at together by TAP members.

In order to get consistent screening and assignment to the buckets, the screening will be done by a TAP-wide screening committee consisting of eight members, one from each project committee. This screening committee will look at each issue, and place them in “buckets”. A list will be compiled with categories and sub categories.

Olson, Collins, and the Joint Committee will make recommendations on which buckets will be worked on by Project Committees. The annual face to face meeting will be when the Joint Committee will make its recommendations for Project Committees.

In addition, it was discussed to remove Area Committees from the format and use Project Committees exclusively. This allows panel members to choose what they wish to work on, just like in prior years. TAP will do their best to give panel members their first choice. Project committees will also be responsible for managing outreach. TAP members will be responsible for outreach, so that the mission of TAP in reaching out to taxpayers will continue.

Each project committee will elect a chair to be on the Joint Committee. The TAP chair will lead the Joint Committee. The TAP vice chair will coordinate outreach for TAP members.

The staff will continue to put the issues into the database and will assign the category and sub category for each issue.

The program owners may provide their own list and the TAP Director and National Taxpayer Advocate will marry the list together and will decide what will be priority on this list. Once projects are identified, information will be sent out for members to decide which project to work on.

At this last face to face meeting the Joint Committee decided to go through the screening process and placed the issues in the appropriate bucket and sent the list to IRS.

The proposed projects submitted for 2012 so far are:

- Toll free
- Third party return checkbox – 1040 business
- Tax Forms and Publications
- Notices
- E-File
- Return Processing

The Quality Review process will continue as an Adhoc Committee as well as the Communication Committee.

Sandra Akbar asked, “With removing the geographic areas, what will this do for the selection of new members going forward?” Walker answered, “A candidate will be selected based off zip codes. The actual process on who conducts the interviews would be an Adhoc committee.”

Jackie Granger asked what the staff’s position was and Walker’s response was “Each office or manager will represent two project committees and each analyst will have one project committee. Collins, along with the managers, will make the determination as to which staff will be assigned to what committee.”

Werner asked if anyone could volunteer for the screening committee. Walker answered that if any panel member wants to be on the screening committee they need to speak up during their committee meetings. Every member will be on at least one project committee and they can also additionally volunteer for one of the ad hoc committees.

It is not definite, but hoping by October 1<sup>st</sup> project committees will be determined and presented to TAP members so that they can select which committee they would like to work on.

Werner said she is very optimistic for TAP after the Joint Committee meeting as TAP members will be able to have a greater impact on taxpayer issues.

If any panel member has any questions or concerns, feel free to email your questions to the Milwaukee Staff, Werner, or Walker and your questions will get answered.

#### **Area 4 Achievements**

Werner thanked Shaun Brandewie and Mark Marshalek for volunteering to be on task forces and for the members who have been diligent in doing outreach. She noted there will be a greater focus on outreach per Nina Olson.

#### **DFO Report – Wess**

Donna Wess noted they are seeing an increase in adoption credit cases going through the examination process. Fraud is not getting better and there seems to be a lot of Identity theft. There are perpetrators that have been going to churches and convincing people who don't need to file, to file individual income tax returns because they may be entitled to a refund when actually the filer isn't entitled to a refund. In some cases, individuals are losing benefits because of filing. These perpetrators are approaching the ministers and telling them refunds from members could be direct deposited into the church's account. The social security numbers and other personal information are then obtained by these fraudsters.

#### **Issues Approved by Joint Committee**

- **18851 – E-Services Access to CP 2000**  
(Akbar, lead, Petersen-Grosse, Kelly, Mackie)
- **18611 – Refund Delays on Electronically Filed Returns**  
(Hayden, lead, Akbar, PK, Brandewie, Vanderver)
- **19138 – Change Instructions for Form 720, Quarterly Federal Excise Tax Return**  
(Oetken, lead, Hayden)

#### **IRS Response Received**

##### **17354 – Amount Due Collection Notices (Vanderver, Buschmann)**

Stephen Vanderver said this issue concerns the IRS not informing the taxpayer who owed taxes know about the Offer-In-Compromise (OIC). We suggested this information be placed in the first notice to taxpayer. This issue was initially denied so a rebuttal was sent and IRS agreed and accepted our suggestion.



## **Project Committee Highlights**

### **Communications:**

Marshalek stated communications has a conference call scheduled for tomorrow. The committee talked about e-TAP and the goals. There has been a lot of work on the internal subcommittee revising the handbook and the Annual Report, which was sent out to the communications group for review. Patti Robb noted the Annual Report should be going out to the printer by the end of this week.

### **EITC:**

Akbar noted the subcommittee is in the process of submitting updates to the Quality Review team about addressing the targeted market. There will be a few more modifications before it goes to Joint Committee.

### **Notice Improvement:**

Brandewie said the subcommittee has no new updates. The subcommittee is frustrated that IRS has not had anything for them to do. Roy Block said this has been raised and the staff did not know about the members' frustration. Nina Olson is concerned IRS is not providing issues to the subcommittee. There will be a Notice Improvement Project Committee in existence for next year.

### **SBSE Practitioner Engagement:**

Werner said over 1.2 million IRS letters went out to taxpayers so far this year. The committee is charged with revising letters going out to taxpayers, as well as making suggestions to improve the taxpayer experience, once a letter is received. The committee is making progress and is working on completing its report to the IRS program owners.

### **VITA:**

Vanderver stated this committee finished their work on three proposals, which are being sent to Quality Review and will be presented at the next Joint Committee meeting for approval.

### **Office Update – Block**

The Milwaukee office has a working white board used to track issues. Area 4 has elevated a total of 11 issues to Joint Committee. This committee has been very productive. The identity theft issue that Wess spoke of was worked on by this Area 4 committee and Issue 4210 was created. There are now tools in place to stop some patterns of identity theft from happening. The staff is continuing to work behind the scenes on the issues.

Area 4 TAP members were asked last month to categorize the categories. Sandra Akbar said she looked at the categories and stated most of them appeared to be customer service related. However, she said there was no category for customer service. Block noted perhaps we are missing some categories. He suggested that TAP members review the categories listed and make recommendations.



Regarding outreach, Block explained that it is more than just standing in front of a group and talking about TAP. One method he suggested for outreach would be to use social media. He suggested other ways to perform outreach and mentioned that the annual meeting will have a training session on outreach.

**Closing – Werner**

Email or call with questions or concerns.

**Meeting Adjourned**

**Next conference call is Tuesday, September 20, 2011, 1:00 pm CT / 2:00 pm ET**

**Area 4 Committee Teleconference  
1:00 pm CT / 2:00 pm ET  
July 19, 2011**

**Designated Federal Official**

- Block, Roy Milwaukee, WI Manager

**Committee Members Present**

- Akbar, Sandra Chicago, IL Member
- Eng, Harry St Charles, IL Vice Chair
- Hayden, Robert Monroe, MI Member
- Kelly, Eileen Wilmette, IL Member
- Kosanovich, Matt Columbus, OH Member
- Mackie, Wayne Frankenmuth, MI Member
- Marshalek, Mark Powell, OH Member
- Oetken, Todd Louisville, KY Member
- Petersen-Grosse, Chris Elkhart, IN Member
- Vanderver, Steve Evansville, IN Member
- Werner, Mary Jo La Crosse, WI Chair

**Committee Members Absent**

- Brandewie, Shaun Sidney, OH Member
- Granger, Jackie West Bend, WI Member
- Purkayastha, PK Saline, MI Member
- Rhyan, Joyce Cleveland, OH Member
- Wechter, Thomas Glencoe, IL Member

**TAP Staff**

- Smiley, Ellen Milwaukee, WI Analyst
- Robb, Patti Milwaukee, WI Analyst
- Gabriel, Lisa Milwaukee, WI Analyst
- Haywood, Annie Milwaukee, WI Secretary

**Welcome / Review Agenda** (Werner)

Mary Jo Werner welcomed everyone to the meeting.

**Roll Call** (Gold)

Quorum met.

### **Area 4 Chair Report (Werner)**

The Joint Committee Face-to-Face meeting will be held in Seattle, Washington next week. One of the main discussions will be the TAP Refocus. Mary Jo Werner asked the members to send her an email with questions or concerns and she will ensure they are addressed at the meeting.

### **DFO Report (Block)**

IRS employees continue to work on refund claims and other returns. There is an influx of cases regarding Adoption Credits. Either the rules or the process is causing a problem for the taxpayers.

Some inquiries have been from practitioners regarding the service taxpayers receive from the front line IRS employees. Complaints are coming in on their technical ability.

### **Public Input**

None

### **Active Issues**

#### **19298 – Training when Implementing New Procedures**

([Vanderver](#), lead, [Eng](#), [Marshalek](#))

Stephen Vanderver advised Nina Olson defined this problem in her midyear report to Congress and therefore the issue is moot. Consensus to drop.

**DROP**

### **New Issue Report (Eng)**

#### **213310 – IRS Processing Returns Too Slow**

Harry Eng advised the new issue subcommittee recommends dropping this issue

**DROP**

### **Update on Issues Reviewed by Joint Committee June 23, 2011**

#### **18851 – E-Services Access to CP 2000**

([Akbar](#), lead, [Petersen-Grosse](#), [Kelly](#), [Mackie](#))

Eileen Kelly advised one Joint Committee member stated all information is already available through e-services. However, when the subcommittee looked at what is available, it is a cumbersome process to back into the CP 2000 information. Werner will present the issue again to the Joint Committee at next month's meeting. Block said the subcommittee is to be congratulated on tackling this issue.

**Action Item: Kelly will email the completed referral for review by the Joint Committee**

#### **611 – Refund Delays on Electronically Filed Returns**

([Hayden](#), lead, [Akbar](#), [PK](#), [Brandewie](#), [Vanderver](#))

Bob Hayden explained it was suggested to include information about the ERO handbook. The revised referral was sent to Werner to present to the Joint Committee at the meeting next month.

Block added taxpayers filed their returns and had them accepted by IRS. Their documents were not processed and IRS sent letters to the taxpayers to file on paper. This was misdirection on the part of IRS and needs to be explained. IRS software should match the vendor's software. If it doesn't then they should send it back. Chris Petersen-Grosse explained they continue to have complete returns rejected when the issue is with the State return. An attempt to work with Tax Wise ended with no resolution. There had to be something in the software to cause this problem. Re-entering the return information seemed to resolve the problem.

### **19138 – Change Instructions for Form 720, Quarterly Federal Excise Tax Return** (Oetken, lead, Hayden)

Hayden advised the original referral was specific to tanning bed operators, however the time estimate may not be a reliable estimate for several single activities. The referral was modified accordingly and Werner will present it to the Joint Committee.

### **IRS Response Received**

#### **18434 – Signature Clarification on Form 8868**

(Hayden, lead, Kelly, Oetken)

IRS accepted all recommendations listed in the referral.

**ACCEPTED**

### **Project Committee Highlights**

#### **Communications**

Mark Marshalek explained their meeting is tomorrow so he will have updates for next month's call.

#### **EITC**

Eng said they are preparing a library of different slides for IRS employees to use. They have a meeting after this call to finalize discussions before submission to the IRS. Sandra Akbar said their subcommittee has completed their part.

#### **Forms and Pubs**

Hayden said they are working on the language for the most recent Social Security Statement to include information on how to obtain IRS forms. SSA is interested in helping out with this project.

#### **Notice Improvement**

Kelly stated work in this committee has slowed down.

#### **SBSE Practitioner Engagement**

Werner advised they are reviewing the process from the beginning to end when correspondence is received for a campus correspondence audit.

#### **TAC**

Matt Kosanovich said the committee met in May and discussed their recommendations. They are working on drafts of each recommendation and will complete a report for Field Assistance.

## **VITA**

Stephen Vanderver posted a VITA update on TAPSpace. The committee is revising their proposal but will be ready by the August deadline.

## **Office Update (Block)**

Roy Block explained he asked both Smiley and Patti Robb to go through their Area parking lot issues using the SAMS category list and screen the issues to place in “buckets”. They identified the issues that are able to be placed into one bucket. The dialogue was interesting, looking at each issue to combine like kind issues for the buckets.

Block asked each member to go through the parking lot issues and the category list provided with the pre-reads. Use the primary or secondary category listed or come up with your own, but try to determine the underlying issue and see which ones could be added to one bucket. We’ll go over the issues together on next months call.

## **Closing (Werner)**

Werner emphasized outreach for Areas will become our primary responsibility. She encouraged everyone to do outreach as it is a rewarding experience. Werner will be attending the Joint Committee face-to-face and will be taking notes. If there are any comments anyone would like her to include please let her know via an email or phone call.

## **Meeting Adjourned**

**Next conference call is Tuesday, August 16, 2011, 1:00 pm CT / 2:00 pm ET**



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June 21, 2011**

**Designated Federal Official**

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**Welcome / Review Agenda (Werner)**

Mary Jo Werner welcomed everyone.

**Area 4 Chair Report (Werner)**

The Joint Committee has their face-to-face meeting scheduled for July 25th, 26th, and 27<sup>th</sup>. We will be going over the new TAP process and direction and reviewing the last group of elevated issues. Werner stated she received comments from one Area 4 panel member about the TAP Refocus and how the bucket issues will be worked and will be sharing the information at the Joint Committee meeting next month. If anyone else has ideas about the new TAP direction to share at the meeting, please email her.

### **Roll Call (Gold)**

Quorum met.

### **DFO Report (Block)**

Roy Block spoke on behalf of Donna Wess. Looking at the Local Taxpayer Advocates and what they have on their agenda, they are continuing to work first time homebuyer credit cases and now adoption credits are being scrutinized. There is an influx in LTA inventories across the country.

### **Public Input**

None

### **Active Issues**

#### **16703 – Streamline Offer in Compromise (OIC) (Kosanovich, lead, Mackie, Werner)**

At one point Matt Kosanovich was going to draft a referral, however in April of this year, a new version of the Collection Information Statement (CIS) came out. This new version is only for Offer in Compromise cases, not installment agreements, and you do not have to provide three months of all bills, bank statements, etc with it. At one point a different direction was being discussed, but Tom Walker notified the Joint Committee members to drop issues that have not been moving forward to allow the Panel to focus on the new TAP direction. Consensus by committee to drop.

**DROP**

#### **18647- Unenrolled Preparer to Represent in Collection (combined 16870 Required Testing Should Allow POA Status and E-Services) (Eng, lead, Mackie, PK, Vanderver)**

Harry Eng stated that after this issue arose, IRS came out with many detailed examples on how this new process will work. E-Services are now available to preparers who efile at least five returns. We believe this issue has been resolved. Consensus by committee to drop.

**DROP**

#### **19259- Form Needed to Notify IRS of Business Name Change (Eng, lead, Werner, Wechter)**

Eng said this issue came to light on a business type return. However, Area 3 submitted a similar issue (changing business name online), which was rejected because IRS believes the current procedures are adequate. Consensus by committee to drop.

**DROP**

#### **19298- Training When Implementing New Procedures (Vanderver, lead, Eng, Marshalek)**



Vanderver advised a draft referral has been under review by the subcommittee, but Mark Marshalek had requested additional information from Smiley. Smiley stated she emailed the response to Marshalek today. Vanderver indicated he will get together with the subcommittee to review this additional information and discuss additional actions needed. Eng said any time a new program results in a large payout; the complexity is greater and reaches more taxpayers. Vanderver stated the training is not sufficient on new issue or changes in policy.

The group will report back next month.

**ACTION: Smiley to forward email to subcommittee on response/information received.**

### **New Issue Report**

#### **20764 – Form 6251 Regarding Alternative Minimum Tax (ATM)**

The worksheet for Alternative Minimum Tax is available online. The instructions have a TIP directing taxpayers to the ATM assistant online. Consensus by committee to drop.

**DROP**

#### **20767- Forms should be Ready & Available First of the Year**

Late legislation has delayed forms for the last three years. The issue keeps coming up, but it is out of our scope. Consensus by committee to drop.

**DROP**

#### **20806 – Notice Improvement – IRS Must Stop Notice**

The subcommittee recommends this issue be active. This involves training of phone people to let taxpayers know what will happen in during process.

**Parking Lot**

#### **20854 – Priority System for Taxpayers**

Taxpayer believes half of the population does not pay taxes so should not be called “Taxpayers” or receive help before taxpayers who do pay their taxes. Consensus by committee to drop.

**DROP**

#### **20860 – TaxWise & Forms are not Standardized**

Subcommittee agrees IRS never really looked at the standardization of Forms 1099 or Form W-2.

**Parking Lot**

#### **20861- 1040 Instruction Booklet & Tax Return Page Reference**

Subcommittee recommends dropping this issue. Consensus to drop.

**DROP**

#### **20878 – TP Rights EIC, ACTC, & Sch M Denied due to 4029**

This is legislative issue and out of scope. Consensus by committee to drop.

**DROP**

**20891- Return Processing – Banks Should not get Return or Money**

Consensus by committee is to drop the issue.

**DROP**

**20900 – Other Health Care**

Taxpayer believes the new health care tax should be paid for by Federal sales tax.

Consensus by committee is to drop.

**DROP**

**21194 – Audits – Small Business Electronic Records Requested During Audits**

An article from the Wall Street Journal described possible problems for small businesses when electronic records are requested during an audit. Consensus by committee to drop.

**DROP**

**Issues for Joint Committee Review on June 23, 2011 call**

**18851 – E-Services Access to CP 2000 (Akbar, lead, Petersen-Grosse, Kelly, Mackie)**

Eileen Kelly agreed to present this issue to the Joint Committee.

**Joint Committee Quality Review Responses under Review by Subcommittee**

Smiley advised both of the following issues under review by the subcommittees have been discussed, changes accepted, and will be discussed during the Joint Committee call on June 23<sup>rd</sup>. Bob Hayden will present both issues.

**18611 – Refund Delays on Electronically Filed Returns (Hayden, lead, Akbar, PK, Brandewie, Vanderver)**

**19138 – Change Instructions for Form 720, Quarterly Federal Excise Tax Return (Oetken, lead, Hayden)**

**IRS Response Received**

**5434 – Check Box for Form 1065 (2009 issue) (Werner)**

The issue was to add a check box to the Form 1065 for smaller partnerships who qualified under Rev Proc 84-35. This would prevent the assessment of a late filing penalty for those partnerships that qualified. The IRS has rejected the recommendation. Werner will follow up with Lev Martynuik before deciding to rebut or not.

**18396 - Revise Form W-4**

The IRS has rejected this recommendation. PK said it is almost just status quo. What the subcommittee recommended was providing extra ways for exemption from withholding. Is it worth arguing the case? Would we be going up against an emotional barrier or a logical barrier? The committee agreed a rebuttal response should be prepared.

**Action Item: PK will write the rebuttal for this issue.**

## **IRS Response to TAP Rebuttal**

### **16851 – Federal/State Tax Law Confusion**

Werner explained taxpayers should keep in mind the State treats items differently than the Federal. We were looking for a disclaimer only. PK read some information where it does say how the State treats issues different from the Federal. But this was in State Department of Revenue information, not on Federal forms. Smiley explained we have no recourse to respond to the IRS once a response is received on a rebuttal. Issue will be closed rejected.

### **Outreach**

Werner thanks the panel members who participate in outreach. This is the focus point of the Area Committees now and the emphasis is on outreach. Werner informed the committee outreach will also be addressed during the Joint Committee face-to-face meeting.

Block mentioned he has been tasked to deliver an outreach plan to present to the Joint Committee. He will be explaining what outreach is and what the panel members can do for outreach. It will also include a segment about the marketing of TAP. More information will be provided in August.

## **Project Committee Highlights**

### **Forms and Pubs**

Bob Hayden expressed concern that many taxpayers do not have access to federal tax forms. Some do not have computers or transportation to travel to TAC offices. We are having conversations with the Social Security Administration (SSA) to request placing information on their Form SSA 1099 to advise taxpayers how to request federal tax forms. The IRS will work with SSA if they agree to this.

Block added many state taxing authorities do not mail out forms to taxpayers.

### **VITA**

Vanderver stated they are still working on their projects and participating in preparing returns.

### **EITC**

Sandra Akbar stated they are in the second stage of putting together a package addressing interest groups. They are looking at publications and supplementing the process to see if language, logo, and pictures fit with the message they are trying to get out.

### **Office Update**

Block stated our interview process will be completed this week. Area 4 has 8 applicants and our recommendation will be sent to the Director next week.

Smiley requested an update on two issues that have received a response from IRS: Issue 18798 Creation of Separate PO Box for Amended Returns from Federally Declared Disaster Areas and Issue 16727 Reducing Nonproductive Campus Correspondence Audits. Werner agrees these issues will not be rebutted, but she will take the issues with her to the Joint Committee face-to-face meeting for discussion.

### **Meeting Adjourned**

**Next conference call is Tuesday, July 19, 2011, 1:00 pm CT / 2:00 pm ET**



**Area 4 Committee Teleconference  
1:00 pm CT / 2:00 pm ET  
May 17, 2011**

**Designated Federal Official**

- Block, Roy Milwaukee, WI Program Manager

**Committee Members Present**

- Akbar, Sandra Chicago, IL Member
- Brandewie, Shaun Sidney, OH Member
- Eng, Harry St Charles, IL Vice Chair
- Granger, Jackie West Bend, WI Member
- Hayden, Robert Monroe, MI Member
- Kelly, Eileen Wilmette, IL Member
- Marshalek, Mark Powell, OH Member
- Oetken, Todd Louisville, KY Member
- Petersen-Grosse, Chris Elkhart, IN Member
- Purkayastha, PK Saline, MI Member
- Vanderver, Steve Evansville, IN Member
- Werner, Mary Jo La Crosse, WI Chair

**Committee Members Absent**

- Kosanovich, Matt Columbus, OH Member
- Mackie, Wayne Frankenmuth, MI Member
- Rhyan, Joyce Cleveland, OH Member
- Wechter, Thomas Glencoe, IL Member

**TAP Staff**

- Smiley, Ellen Milwaukee, WI Analyst
- Robb, Patti Milwaukee, WI Analyst
- Gabriel, Lisa Milwaukee, WI Analyst
- Haywood, Annie Milwaukee, WI Secretary

**Welcome / Review Agenda (Werner)**

Mary Jo Werner welcomed everyone.

**Area 4 Chair Report (Werner)**

There will be no official Area face-to-face meeting this year. However, we will have a discussion about an unofficial face-to-face meeting where travel will not be reimbursed. This discussion will take place at the end of the meeting.

**Roll Call (Gold)**

Quorum met.

### **DFO Report (Block)**

Roy Block advised Donna Wess is at Federal Advisory Committee Act (FACA) training. There are no issues to report.

### **Public Input**

None

### **Active Issues**

#### **16703 – Streamline Offer in Compromise (OIC) (Kosanovich, lead, Mackie, Werner)**

Werner reported Matt Kosanovich will write up this issue for discussion with the subcommittee. We will discuss on next month's call.

#### **18611 – ERS / E-file Return (Hayden, lead, Akbar, PK, Brandewie, Vanderver)**

Bob Hayden stated the subcommittee has discussed the issue and come to consensus. Some solutions have been proposed for the IRS to let taxpayers know their return / refund has been delayed. When the IRS states the return is "accepted", it really means accepted for processing.

PK Purkayastha suggested the site which exists today should be changed to say "where is my return". The taxpayer should be able to go to the site for information. Steve Vanderver would like to forward the issue as recommended by the subcommittee.

Block stated this issue specifically indicates e-file returns. IRS is programming the computers and upgrading the software prior to filing season. The IRS also asks all tax software company's to do the same. The real question and issue is when would any e-filed return end up in an area where the IRS doesn't like something on the return other than an audit? Line 7 matches line 7 on both the IRS software and the practitioner's software. Vanderver said this is the substance of the issue, as it does happen. Block stated if the IRS is questioning an e-filed return because something does not match, then the IRS should be rejecting the return back to the sender and explain why it is being returned. The panel members agreed by consensus to elevate the issue. Issue will be forwarded to Area 4 Quality Review.

#### **18647 – Unenrolled Return Preparer to Represent in Collection (combined 16870 Required Testing Should Allow POA Status and E-Services) (Eng, lead, Mackie, PK, Vanderver)**

Harry Eng asked if the oversight and testing would create a basis or level of qualification. We will discuss the issue on next month's call.

#### **19138 – Change Instructions for Form 720, Quarterly Federal Excise Tax Return (Oetken, lead, Hayden)**

Todd Oetken stated the subcommittee worked on this issue during the face-to-face meeting in December. The 720 is a complicated form, but there should be a disclaimer for tanning bed operators. The panel members agreed by consensus to elevate the issue. Issue will be forwarded to Area 4 Quality Review.

**19259 – Form Needed to Notify IRS of Business Name Change** (Eng, lead, Werner, Wechter, Hayden)

Eng advised the subcommittee will get together for a discussion on the issue. The proposal is for a way to inform the IRS of a business name change. We will discuss the issue on next months call.

**19298 – Training When Implementing New Procedures** (Vanderver, lead, Eng, Marshalek)

Vanderver requested to move the issue to next month for discussion.

**19681 – Return Processing – What Received Date Does IRS Use** (Rhyon, lead, Vanderver, Kosanovich, Mackie)

Rhyon is out on sick leave and not available for discussion. Vanderver has reviewed the information and stated it is established in Pub 17 and other areas that the date stamped on the envelope is the date the return is considered filed. The problem occurred with an employee's action. It's an Individual mistake. Consensus to drop.

**DROP**

**New Issue Report (Granger)**

**20139 - Form 1041 K-1 & Schedule E Part 111 Confusing**

There is no double taxation.

**DROP**

**20487 – FTHBC / ERS Glitch Causing Hardship on Taxpayer**

**DROP**

**20544 - Form 1065 Sch K-1 / TP Pay their Share at Entity Level**

**DROP**

**20545 - Loop in Instructions between Form 1040 & Form 2441**

**DROP**

**20603 - 2010 Form Standard Deduction not in Margin in Tax and Credit Section**

This issue should be looked at.

**Parking Lot**

**20665 - Notice-IRS demand for Response in 10 Days is Unfair**

We feel there is enough contact and direction information on the Notices.

**DROP**

**20668 - Lack of Understanding Taxes / now Taxpayer owes IRS**

**DROP**

**20669 - Unproductive Audit Selection**

IRS Communication Issue – add this to the subject line.

**Parking Lot**

**20671 – FTHBC Return Processing Delays - Frustrating to TP**

There is a similar issue from Area 4 already in the Parking Lot.

**Parking Lot**

**20685 - Form 4852, Substitute W-2 Info not Shared with SSA**

IRS and Social Security need to work together.

**Parking Lot**

**20702 - Form 1099 by Business Owners**

Beyond scope of TAP.

**DROP**

**Issues for Review by Joint Committee**

**18851 – E-Services Access to CP 2000 (Akbar, lead, Petersen-Grosse, Kelly, Mackie)**

Eileen Kelly will present the issue to the Joint Committee in June.

**Issues Approved by Joint Committee on March 24, 2011, call**

**18434 – Signature Clarification on Form 8868 (Hayden, lead, Kelly, Oetken)**

Congratulations – approved.

**18632 – Instructions for Form 2290, Heavy Highway Vehicle Use Tax Return (Granger, lead, Vanderver, Marshalek)**

Approved – congratulations.

**Response Received from IRS**

**16727 – Reducing Nonproductive Campus Correspondence Audits (Granger, Werner, Young, Adams-Dodds)** IRS rejected the recommendations; however the subcommittee will rebut the decision.

**18798 – Creation of Separate PO Box (Young, Werner)** The IRS rejected the recommendations; the subcommittee will rebut the decision.

**Issues Referred to SAMS**

**20887 – Incorrect Refund due to IRS Recalculation of Self-Employment Tax (Werner)**

IRS is allowing the health insurance deduction twice on the self-employment tax calculation when both spouse own the business, resulting in incorrect refunds issued. Close accepted. All information helps in correcting IRS errors.

**21033 – IRS Processing Error of Form 3800 General Business Credit (Werner)**

IRS is disallowing the General Business Credit listed on Form 1040 line 53 when the credit is due to Form 8941, *Credit for Small Employer Health Insurance Premiums*. Issue was referred may 13, 2011.





## **Outreach**

Thanks to Block, Kelly, Oetken, and Petersen-Grosse for all your work. Everyone is encouraged to continue doing outreaches.

## **Office Updates (Block)**

The TAP managers were in Washington last week reviewing new applicants. There were 64 applicants for Area 4 and Area 5. The Communication Committee completed their face-to-face held in New Orleans. The committee came up with a plan to submit to the National Taxpayer Advocate on what the new TAP will look like. Block announced his retirement from Government Service effective December 31, 2011.

Werner asked if you are interested in having an unofficial Area face-to-face meeting, please send and email to Ellen Smiley or Mary Jo Werner.

## **Meeting Adjourned**

**Next conference call is Tuesday, June 21, 2011, 1:00 pm CT / 2:00 pm ET**

**Area 4 Committee Teleconference  
1:00 pm CT / 2:00 pm ET  
April 19, 2011**

**Designated Federal Official**

- Wess, Donna    Memphis, TN    Designated Federal Official

**Committee Members Present**

- Akbar, Sandra    Chicago, IL    Member
- Brandewie, Shaun    Sidney, OH    Member
- Eng, Harry    St Charles, IL    Vice Chair
- Granger, Jackie    West Bend, WI    Member
- Kelly, Eileen    Wilmette, IL    Member
- Mackie, Wayne    Frankenmuth, MI    Member
- Marshalek, Mark    Powell, OH    Member
- Purkayastha, PK    Saline, MI    Member
- Vanderver, Steve    Evansville, IN    Member
- Werner, Mary Jo    La Crosse, WI    Chair

**Committee Members Absent**

- Hayden, Robert    Monroe, MI    Member
- Kosanovich, Matt    Columbus, OH    Member
- Oetken, Todd    Louisville, KY    Member
- Petersen-Grosse, Chris    Elkhart, IN    Member
- Rhyan, Joyce    Cleveland, OH    Member
- Wechter, Thomas    Glencoe, IL    Member

**TAP Staff**

- Block, Roy    Milwaukee, WI    Manager
- Smiley, Ellen    Milwaukee, WI    Analyst
- Robb, Patti    Milwaukee, WI    Analyst
- Gabriel, Lisa    Milwaukee, WI    Analyst
- Haywood, Annie    Milwaukee, WI    Management Assistant

**Guests**

- Walker, Tom    Dallas, TX    TAP Chair
- Kim, John    Honolulu, HI    TAP Vice Chair
- Collins, Shawn    Washington, DC    TAP Director
- Berkey, Steve    Plantation, FL    Sr. Program Analyst

**Welcome / Review Agenda (Werner)**

Harry Eng welcomed everyone.

### **Roll Call (Gold)**

Quorum met.

### **DFO Report (Wess)**

Donna Wess thanked everyone for the information sent in regarding the problems encountered with the First Time Home Buyer Credit (FTHBC). Processing has been corrected and these returns and refunds are no longer being delayed.

Identity Theft continues to grow and TAS is seeing more ID theft with deceased taxpayers. Roy Block advised Area 4 submitted the issue to block a taxpayer's Social Security Number (SSN) from being used on a tax return if not required to file. The IRS is now blocking deceased taxpayer's accounts. Steve Vanderver states a person who has no filing requirement should also be able to use this process. Ellen Smiley explained blocking a deceased taxpayer's SSN is the first step taken toward blocking accounts.

### **TAP Refocus (Walker and Kim)**

Tom Walker referred to a memo emailed regarding the Refocus of TAP. The purpose of this discussion is to lay out where TAP is headed and to obtain input from everyone. Issues will still come in via the internet, telephone, and outreach and will continue to be screened by each Area new issue screening committee. Up to the new issue screening committee, nothing will change. If an Area thinks the issue is good, it will be placed in the parking lot instead of active status. "Buckets" will be formed from these parking lot issues. The buckets will be established and defined by the Joint Committee (JC) and the Area will work to assign issues to the bucket. The goal for the JC is to look at a minimum of 6 months of bucketed issues. Another goal is to review the bucket and prioritize the issue in the bucket and identify what the true issue is. IRS will have their own list of issues to work; the Program Owners and Shawn Collins will negotiate what issues/buckets to work on. TAP will then assign members to project committees to work the bucket issue. This is the core of how we think the new TAP will work. One question is what the job of the Area's will be. The job of the Area will be to do outreach; work with LTAs and analysts to identify potential issues, screen the issues, research and analyze the issues. There has been concern that issues will not make the buckets and will not get addressed. However, there are several ways of raising issues. SAMS will still be used for immediate interventions.

The goal at the Joint Committee face-to-face meeting in July is to firm up the procedure and come out with a documented plan.

PK Purkayastha asked what is the benefit of making this change. Walker responded there was a problem with similar, occasionally duplicate, issues being elevated, and there was some concern from the National Taxpayer Advocate (NTA) Nina Olson that TAP was reaching beyond the scope

of the TAP charter. Also, IRS is more receptive to the recommendations when they are involved in the process.

Jackie Granger asked if the project committees would also be changed. Shawn Collins said the project committees can vary from year to year, so it is possible.

Sandra Akbar stated there are a lot of issues regarding customer service and training, which is a good topic for a project committee.

Mary Jo Werner asked if we will have the ability to start our own project committee. Walker responded we clearly have the ability to put issues on a list that the IRS has not addressed. We will always have the authority or ability to say to the IRS this is an important issue.

PK advised he struggles with whether the buckets are predefined. Walker believes the JC will predefine a set of buckets, and then the area will populate the bucket. PK asked how we will influence the JC for consideration. Walker replied through dialogue, whether an email, conversation, or face to face.

Harry Eng asked how much of a role can area member take in the analysis piece. Would it be bad form to work on the issues more before placing them in the parking lot and sending them to JC?

Walker stated we will work long enough to identify what the issue is.

Collins reminded everyone this is new to all of us and is glad we are able to shape it into what we would like it to be. She looks forward to your questions and concerns so that we can address them and asked everyone to put their concerns on paper and email them to Roy Block and his staff. Collins will be meeting with Nina Olson to address some of the questions.

Ellen Smiley asked when the bucket issues are worked, can they be worked by Area. Walker replied a broader response comes from different geographical areas. Werner asked if he could leave that part open, as there is a bond with the Area 4 members. Also, if there is a particular issue and Area 4 wanted to work it, they should be able to work on it; there should not be a reason why they cannot work it. Walker said he will leave it open for discussion.

Eileen Kelly indicated you are taking away work from the Area you already have. You should use these groups instead of forming new groups. Smiley suggested maybe each analyst have a project committee assignment worked by members from across the country like they are assigned now and have the bucket project committee worked on by their own Area members. Walker indicated this suggestion will be addressed by the JC.

Walker asked if additional concerns or suggestions come up, to send them to the analyst for JC consideration.

## **Public Input**

None

## Active Issues

**16703 – Streamline Offer in Compromise (OIC)** (Kosanovich, lead, Mackie, Werner)  
To be discussed next month.

**18611 – ERS / E-file Return** (Hayden, lead, Akbar, PK, Brandewie, Vanderver)  
To be discussed on next month.

**18647 – Unenrolled Return Preparer to Represent in Collection (combined 16870 Required Testing Should Allow POA Status and E-Services)** (Eng, lead, Mackie, PK, Vanderver)  
To be discussed on next month's call

**19138 – Change Instructions for Form 720, Quarterly Federal Excise Tax Return** (Oetken, lead, Hayden)  
A referral was prepared by Todd Oetken, but he is not available today. To be discussed on next month.

**19259 – Form Needed to Notify IRS of Business Name Change** (Eng, lead, Werner, Wechter, Hayden)  
To be discussed next month. .

**19298 – Training When Implementing New Procedures** (Vanderver, lead, Eng, Marshalek)  
To be discussed next month. .

**19681 – Return Processing – What Received Date Does IRS Use** (Rhyan, lead, Vanderver, Kosanovich, Mackie)  
To be discussed next month.

## New Issue Report (Granger)

**20036 – Website:** [www.irs.com](http://www.irs.com) vs. [www.irs.gov](http://www.irs.gov)  
This is beyond the scope of TAP.  
**DROP**

**20130 – Return Processing: Authority of Taxpayer Advocates**  
IRS recorded the wrong received date and an amended return was denied as a result. Someone should have the authority to fix it. Recommend review of this issue.  
**Parking Lot**

**20139 – Form 1041 K-1 & Schedule E Part III Confusing**  
Reintroduce next month: more time needed to review.

**20330 – Form 1099R: Unable to put SSA Withheld on Fillable Form**  
Taxpayer is confused.

## **DROP**

### **20334 – One Standard Amount for Mileage**

Requires a law change

## **DROP**

### **20346 – Partnership Penalty Notice Based on IRS Section 6698**

Fiscal year filers sometimes encounter this problem. Recommend review of this issue.

## **Parking Lot**

### **20385 – Taxpayer Rights - Constitution**

## **DROP**

### **20401 Electronic Filing (ERS) & Form 5405 FTHBC**

Although the processing problem with FTHBC is now resolved, the issue is the IRS needs to be ready to do business. Recommend review of this issue.

## **Parking Lot**

### **20443 – Efile should be done by the IRS.**

This is beyond the scope of TAP.

## **DROP**

### **20445 – W-2 Forms Should be Filed Directly with IRS**

SSA and IRS are in discussion regarding this. Roy Block added SSA now receives 80 percent of W-2's from employers electronically. As a result, the State withholding information would be able to be transmitted to IRS.

## **DROP**

### **20451 – Form 5405 FTHC and Instructions Do Not Match**

The discrepancy between the form and the instructions needs to be addressed. Recommend review of this issue.

## **Parking Lot**

## **Issues in Area 4 Quality Review**

### **18851 – E-Services Access to CP 2000 (Akbar, lead, Petersen-Grosse, Kelly, Mackie)**

Smiley will forward the issue to the subcommittee once received from the Joint Committee Quality Review.

## **Issues for Joint Committee Review on April 28, 2011, call**

### **18434 – Signature Clarification on Form 8868 (Hayden, lead, Kelly, Oetken)**

**18632 – Instructions for Form 2290, Heavy Highway Vehicle Use Tax Return (Granger, lead, Vanderver, Marshalek)**

**Issue Approved by Joint Committee on March 24, 2011, call**

**18396 – Wording on Form W-4 (PK, lead, Kelly, Werner, Turner, Eng)**

**Response Received from IRS**

**16851 – Federal/State Tax Law Confusion (Werner, lead, Kosanovich)**

The IRS rejected the recommendation; however the subcommittee has sent a rebuttal.

**16885 – Publication 15/15A (Akbar)**

The IRS accepted this recommendation.

**Outreach**

Please continue to do outreach and forward your reports to Smiley. There were interesting outreaches last month: Eng had an article published and Granger had outreaches with people while on the Rhine River.

**Project Committee Highlights**

**Communications**

Mark Marshalek reported they are working with members who have missing photos on TAPSpace and also encouraging members to join Facebook. They will work with members if they need help setting up their Facebook page.

**EITC**

Sandra Akbar advised their face-to-face meeting is next week. EITC is measuring some fraud issues, so she pulled some information from the State of IL for discussion at the meeting.

**Forms and Pub**

Wayne Mackie reported their face-to-face meeting is in two weeks.

**Notice Improvement**

No update

**SBSE Correspondence Exam**

No update

**SBSE Practitioner Engagement**

Werner advised their face-to-face meeting is in a month.



### **TAC**

Committee is making their TAC visits to check on the self serve forms distribution. Their face-to-face meeting is in three weeks.

### **VITA**

Steve Vanderver reported they are making progress in the areas of financial education. Their face-to-face meeting is in Atlanta next month.

### **Office Updates (Block)**

Roy added we will finish ranking new TAP applicants for 2012 in May, and are requesting panel members from Area 4 to assist with the interviews in June. Akbar and Vanderver volunteered to interview.

### **Meeting Adjourned**

**Next conference call is Tuesday, May 17, 2011, 1:00 pm CT / 2:00 pm ET**



**Area 4 Committee  
Meeting Minutes  
March 15, 2011 – 1:00 pm CT**

**Designated Federal Official**

- Wess, Donna                                      Memphis, TN                                      Designated Federal Official

**Committee Members Present**

- Akbar, Sandra                                      Chicago, IL                                      Member
- Brandewie, Shaun                                      Sidney, OH                                      Member
- Eng, Harry                                      St Charles, IL                                      Vice Chair
- Granger, Jackie                                      West Bend, WI                                      Member
- Hayden, Robert                                      Monroe, MI                                      Member
- Kelly, Eileen                                      Wilmette, IL                                      Member
- Kosanovich, Matt                                      Columbus, OH                                      Member
- Mackie, Wayne                                      Frankenmuth, MI                                      Member
- Marshalek, Mark                                      Powell, OH                                      Member
- Oetken, Todd                                      Louisville, KY                                      Member
- Petersen-Grosse Chris                                      Elkhart, IN                                      Member
- Rhyan, Joyce                                      Cleveland, OH                                      Member
- Vanderver, Steve                                      Evansville, IN                                      Member
- Wechter, Thomas                                      Glencoe, IL                                      Member
- Werner, Mary Jo                                      La Crosse, WI                                      Chair

**Committee Members Absent**

- Purkayastha, PK                                      Saline, MI                                      Member

**TAP Staff**

- Block, Roy                                      Milwaukee, WI                                      Manager
- Smiley, Ellen                                      Milwaukee, WI                                      Analyst
- Haywood, Annie                                      Milwaukee, WI                                      Management Assistant

**Roll Call (Gold)**

Quorum met.

**Area 4 Chair Report (Werner)**

Mary Jo Werner reviewed the agenda: one change is Jackie Granger will present the New Issue Report.

On the last Joint Committee call, a Toll-Free Task Force was established to prepare a White Paper on all the toll-free issues TAP has received. A volunteer from each Area Committee will join the task force. Mark Marshalek has volunteered for Area 4.

Rebuttals have to be submitted within a specific timeframe. We have 60 days to rebut the IRS response to an issue; otherwise the IRS is not required to respond.

### **DFO Report (Wess)**

Donna Wess explained returns filed including the First Time Home Buyer Credit (FTHBC) repayment are going to ERS, creating a backlog for those individuals anticipating a refund. IRS was not set up to correctly process these returns. IRS is getting swamped with these issues.

Steve Vanderver indicated when there is revision to a program, training is the issue. This is true of Issue 19298 – Refund Delay – Customer Service. There is a deeper issue of training and he would like to work this issue in Area 4. Ellen Smiley suggested changing the title to include Training.

**Action Item: Smiley will change the title.**

### **Public Input**

None

### **Active Issues**

#### **16703 – Streamline Offer in Compromise (OIC) (Kosanovich, lead, Mackie, Werner)**

Further discussion with Wayne Mackie and Werner is needed. This issue has to do with the application; we need to narrow our focus for this issue. Will discuss during April's call.

#### **18611 – ERS / E-file Return (Hayden, lead, Akbar, PK, Brandewie, Vanderver)**

The subcommittee had a conference call last Wednesday with the Subject Matter Experts (SMEs). Additional information was provided by them. We will focus for 2012 on "Where's My Refund" due to updated IRS processing. We will continue to work the issue and come up with a plan for discussion by April's call.

#### **18647 – Unenrolled Return Preparer to Represent in Collection (combined 16870 Required Testing Should Allow POA Status and E-Services) (Eng, lead, Mackie, PK, Vanderver)**

Harry Eng is still collecting information. Hold for discussion during April's meeting.

**19138 – Change Instructions for Form 720, Quarterly Federal Excise Tax Return (Oetken, lead, Hayden)** Todd Oetken advised he just sent a referral to Bob Hayden for review. They will discuss and complete the referral for April's meeting.

**19259 – Form Needed to Notify IRS of Business Name Change (Eng, lead, Werner, Wechter, Hayden)** The subcommittee received input from Smiley. Hold for discussion during April's meeting.

### **New Issue Report (Granger)**

### **19681 – Return Processing – What Received Date Does IRS Use**

Is the postmark date or IRS received date used to determine if an amended return is too late to be processed? It is stated clearly in Pub 17, but not in the instructions for Form 1040X. Consensus to change status to **Active**. Subcommittee formed: [Rhyan, lead](#), [Vanderver](#), [Kosanovich](#), [Mackie](#).

### **19774 – Schedule Instructions in the Form 1040 Instructions**

The 1040 Instructions contain schedule instructions except for schedule L and B. They have their own instructions printed on the schedule.

**DROP**

### **19864 – Form 8825 Delay Not Needed, No changes on Form**

There was a delay in allowing e-filing, but it has already been resolved.

**DROP**

### **19886 – Partnership Return Due date**

This would require a law change.

**DROP**

### **19971 – 1040 ES Instructions for Use of Overpayment**

The instructions for previous year overpayment does appear on Form 1040ES.

**DROP**

### **19986 – Tax Forms & Pubs – Change form 1040**

Similar issue has been presented by Area 1 and accepted by the Joint Committee.

**DROP**

Werner encouraged the committee members to bring up any issue that may come up during discussions they have with taxpayers or if you hear an issue that we can add as a new issue.

## **Issues in Area 4 Quality Review**

**18437 – Signature Clarification on Form 8868** ([Hayden, lead](#), [Kelly](#), [Oetken](#))

**18632 – Instructions for Form 2290, Heavy Highway Vehicle Use Tax Return** ([Granger, lead](#), [Vanderver](#))

Both of these issues will be forwarded to Joint Committee Quality Review.

**18851 – E-Services Access to CP 2000** ([Akbar, lead](#), [Petersen-Grosse](#), [Kelly](#), [Mackie](#))

This issue came back from the Area 4 quality review with additional questions to be answered. The subcommittee is reviewing and will respond.

## **Response Received from IRS**

**17354 – Amount Due Collection Notices** ([Vanderver, lead](#), [Buschmann](#))

Because of the wording this issue might be rejected. We are discussing the rebuttal of this issue.

### **Issues approved by Joint Committee on February 24, 2011 call**

#### **18798 – Creation of Separate PO Box for Amended Returns from Federally Declared Disaster Areas (Young, Werner)**

This issue was approved and forwarded to the IRS

### **Issue Not Approved by Joint Committee but Referred Back to subcommittee for Further Development**

#### **18396 – Wording on Form W-4 (PK, lead, Kelly, Werner, Turner, Eng)**

This issue has been reworded by subcommittee. It will be presented on the March Joint Committee call.

Werner advised anyone is welcome to join the Joint Committee call on March 24, 2011 at 1:00 pm CT. The call in information is 866-606-4717 and the access code is 4054031.

### **Update on TAP Rebuttal**

#### **16731 – First Time Event Penalty Abatement (Werner, Vanderver, Mackie)**

The IRS is planning to conduct a review of its programs and may revisit this suggestion. As a result, this issue will be closed as Partially Accepted and we'll Monitor IRS Action.

### **Outreach**

All of our first year members are doing outreaches. A total of 285 Area outreaches were completed last month. We want to encourage the outreach.

### **Project Committee Highlights**

#### **Communications**

Mark Marshalek said the committee is still working on getting folks to update their TAPSpace information. The committee is working through issues on Face Book by keeping current with relative articles.

#### **EITC**

Harry Eng stated they have been working on cataloging; trying to catalog them so people can pull from them. The committee is planning to use the face-to-face meeting to complete this.

### **Forms and Pub**

This has been a rather busy month working on the Form 1040 Schedule F review and returning it to program owner. Publication 504 is also under review. Form 1040 Schedules C, D and E are not due until May 1<sup>st</sup>.

### **Notice Improvement**

We received another round of notices to prepare frequently asked questions that will be posted on the website. We are continuing to work on the notices sent to us.

### **SBSE Correspondence Exam**

No current update

### **SBSE Practitioner Engagement**

We have a meeting tomorrow on how we can streamline the appeal process to make it faster and more taxpayer friendly.

Block advised Tom Wechter sent information on this topic - Block will forward it to the committee.

### **TAC**

We a standard set of questions and are working gathering information to discuss at the face-to-face meeting in May.

### **VITA**

Steve Vanderver advised the committee is working on two sub-projects and working to have them implemented. We determined 16 million taxpayers are using paper method of filing returns. At the face-to-face in May we will set up assignments for training and volunteers to go to Atlanta.

### **Office Updates (Block)**

Block updated the committee that TAP is receiving many calls on the non receipt of tax packages. These are taxpayers who have chosen not to e-file. The Joint Committee agreed the issues would be gathered and forwarded to IRS on an ongoing basis. It has not been dropped but is being worked on a larger scale.

### **Meeting Adjourned**

**Next conference call is Tuesday, April 19, 2011, 1:00 pm CT / 2:00 pm ET**

**Area 4 Committee Teleconference  
1:00 PM CT / 2:00 PM ET  
February 15, 2011 – 1 p.m. CT**

**Designated Federal Official**

- Wess, Donna                                      Memphis, TN                                      Designated Federal Official

**Committee Members Present**

- Akbar, Sandra                                      Chicago, IL                                      Member
- Brandewie, Shaun                                      Sidney, OH                                      Member
- Eng, Harry                                      St Charles, IL                                      Vice Chair
- Granger, Jackie                                      West Bend, WI                                      Member
- Hayden, Robert                                      Monroe, MI                                      Member
- Kelly, Eileen                                      Wilmette, IL                                      Member
- Mackie, Wayne                                      Frankenmuth, MI                                      Member
- Marshalek, Mark                                      Powell, OH                                      Member
- Purkayastha, PK                                      Saline, MI                                      Member
- Rhyan, Joyce                                      Cleveland, OH                                      Member
- Vanderver, Steve                                      Evansville, IN                                      Member
- Wechter, Thomas                                      Glencoe, IL                                      Member
- Werner, Mary Jo                                      La Crosse, WI                                      Chair

**Committee Members Absent**

- Kosanovich, Matt                                      Columbus, OH                                      Member
- Oetken, Todd                                      Louisville, KY                                      Member
- Petersen-Grosse Chris                                      Elkhart, IN                                      Member

**TAP Staff**

- Block, Roy                                      Milwaukee, WI                                      Manager
- Smiley, Ellen                                      Milwaukee, WI                                      Analyst
- Robb, Patti                                      Milwaukee, WI                                      Analyst
- Haywood, Annie                                      Milwaukee, WI                                      Management Assistant

**Roll Call (Gold)**

Quorum met.

**Area 4 Chair Report (Werner)**

Mary Jo Werner advised TAP Chair Thomas Walker was very impressed with the work the Committees are doing and the number of issues being raised.

### **DFO Report (Wess)**

Donna Wess explained IRS has a questionable refund program established which may delay refunds, causing increased case load in the Taxpayer Advocate Service (TAS).

### **Public Input**

None

### **Outreach**

Communicating with taxpayers is a part of TAP member's duties. Continue to do your outreach activities and report them monthly to Ellen Smiley.

### **Active Issues**

#### **16671 – Toll- Free and Customer Issues (Kosanovich, lead, Marshalek, Brandewie, Kelly, Petersen-Grosse, Granger)**

Will discuss next month.

#### **16703 – Streamline Offer in Compromise (OIC) (Kosanovich, lead, Mackie, Werner)**

Werner advised the subcommittee is looking for ways to streamline the OIC process. This issue will be discussed on next months call.

#### **198434 – Form 8868 Part II Signature Requirement (Hayden, lead, Kelly, Oetken)**

The subcommittee pointed out there is no need to sign part one but a signature is required when requesting an additional extension. The difference in signing requirements for the two parts needs to be clarified. Consensus was reached to elevate the issue, but will go through Area 4 Quality Review first.

#### **18611, ERS/E-file Return (Hayden, lead, Akbar, PK, Brandewie, Vanderver)**

Bob Hayden reported there was good discussion between the IRS and the subcommittee. The subcommittee members are interested in securing additional information to see if the "Where's My Refund" and Error Resolution System (ERS) IRS processing can be linked to share information with the taxpayers. A follow up request has been made with the program owner to secure a subject matter expert.

#### **18632 – Instructions for Form 2290, Heavy Highway Vehicle Use Tax Return (Granger, lead, Vanderver)**

Jackie Granger explained e-filing is the fastest way for truckers to file their returns and receive their stamped schedule 1. This information needs to be stated clearly in the instructions, especially for truckers with one vehicle or small trucking companies. Consensus was reached to elevate the issue, but will go through Area 4 Quality Review first.

**18647 – Unenrolled Return Preparer to Represent in Collection (combined 16870 Required Testing Should Allow POA Status and E-Services) (Eng, lead, Mackie, PK, Vanderver)**

Harry Eng reported the subcommittee met on Saturday, February 12, 2011, to discuss this issue. There are two positions the subcommittee has taken: 1) leave IRS tracking where it is and 2) allow representation all the way up to Appeals. Need further development from Area 4 members to allow new authority for tested unenrolled preparers. There will be further discussion prior to the March call.

**18851 – E-Services Access to CP 2000 (Akbar, lead, Petersen-Grosse, Kelly, Mackie)**

Sandra Akbar explained when a taxpayer loses their notice; their tax professional must call IRS to get a copy. The goal of this issue is to allow the tax professional to have access to this information through e-services. This process would save time and money for taxpayers and IRS. Consensus was reached to elevate the issue, but will go through Area 4 Quality Review first.

Wess commented E-service is looking for new approaches and would buy into the plan.

**19138 – Change Instructions for Form 720, Quarterly Federal Excise Tax Return (Oetken, lead, Hayden)**

No update available. Hayden will follow up with Oetken.

**19259 – Form Needed to Notify IRS of Business Name Change (Eng, lead, Werner, Wechter, Hayden)**

Eng reported when a company changes their name, there is no convenient way to notify the IRS. This results in misdirected mail that could cause subsequent IRS actions. Will discuss further next month

**19298 – Refund Delay – Customer Service (Vanderver, lead, Eng, Marshalek)**

Steve Vanderver explained the subcommittee has not met on this issue yet. Discussion moved to March meeting.

**New Issue Report (Akbar)**

**19457 – Customer Service Improvement – Put Service Back**

Customer Service / training issue. Recommend discussing at the face-to-face meeting.

**Parking Lot**

**19458 – Customer Service – Hands on Training Needed**

Customer service / training issue. Recommend discussing at the face-to-face meeting.

**Parking Lot**

**19465 – Health Care Tax Credit Extension Needed**

This is legislative issue and out of scope.

**Drop**

**19466, Notice 1400 – Paper Forms Availability**

Recommend discussing at the face-to-face meeting.

**Parking Lot**



### **19484, Installment Agreement – Reduce or Dismiss Fee**

This is user fee issue and out of scope.

**Drop**

### **19510 – Tax Forms – IRS needs to Rethink Decision**

**19570 – Notice 1400**

**19580 – Forms Not Available**

Recommend discussing all of the non-receipt of tax packages at the face-to-face meeting.

**Parking Lot**

### **Issues in Joint Committee Quality Review**

#### **18396 – Wording on Form W-4 (PK, lead, Werner, Turner, Eng, Kelly)**

Subcommittee reviewed and accepted changes. Issue will be reviewed by Joint Committee on February 24, 2011 call.

#### **18798 – Creation of Separate PO Box for Amended Returns from Federally Declared Disaster Areas (Young, Werner)**

Issue will be reviewed by Joint Committee on February 24, 2011 call.

### **Issues Approved by Joint Committee on January 25, 2011 Call**

#### **16851 – Federal/State Tax Law Confusion (Werner, lead, Kosanovich)**

### **Issues Not Approved by Joint Committee on January 25, 2011 Call**

#### **17392 – Statement on Levy to Notify Employer of Amount to Be Paid (Werner)**

The levy notice prompting this issue was an outdated form. The current revision has very clear language. Issue will be closed and dropped.

### **Project Committee Highlights**

#### **EITC**

There is a call scheduled directly after this call.

#### **Forms and Pub**

Review of different forms and pubs is in progress.

#### **Notice Improvement**

Committee is currently reviewing notices that IRS requested and has a few more new ones.

### **SBSE Correspondence Exam**



Committee is in the process of rewriting the script. It will take a couple of months for a recommendation to be submitted.

**SBSE Practitioner Engagement**

Committee is working on finishing up a white paper.

**TAC**

Members are going out to conduct TAC visits and observations, then sharing with the committee. Our project is related to distribution of forms.

**VITA**

We are looking at the opportunities for enhancing other possible locations for VITA Sites. The committee is at the beginning of the search.

**Customer Experience Focus Group**

Volunteers from each Area will have one or two conference calls to review taxpayer expectations to help improve taxpayer interaction with IRS.

**Office Updates (Block)**

We have received the shipment of the BIO booklets that will be going out to each member in the next day or two. We will be adding a pocket guide for Media (IRS). We are still doing outreaches. Please contact your Analyst prior to you going on your outreaches. We must obtain approval prior to submitting your voucher.

A big Thank You to Joyce Rhyan for putting the BIO Booklet together – great job!

**Meeting Adjourned**

**Next conference call is Tuesday, March 15, 2011, 1:00 pm CT / 2:00 pm ET**

**Area 4 Committee Teleconference  
1:00 PM CT / 2:00 PM ET  
January 18, 2011**

**Designated Federal Official**

- Wess, Donna                                  Memphis, TN                                  Local Taxpayer Advocate

**Committee Members Present**

- Brandewie, Shaun                              Sidney, OH                                  Member
- Eng, Harry                                      St. Charles, IL                              Vice Chair
- Granger, Jackie                                West Bend, WI                              Member
- Hayden, Robert                                Monroe, MI                                  Member
- Kelly, Eileen                                     Wilmette, IL                                Member
- Mackie, Wayne                                 Frankenmuth, MI                            Member
- Marshalek, Mark                                Powell, OH                                  Member
- Purkayastha, PK                                Saline, MI                                    Member
- Rhyan, Joyce                                    Cleveland, OH                               Member
- Vanderver, Steve                                Evansville, IN                                Member
- Werner, Mary Jo                                 La Crosse, WI                                Chair

**Committee Members Absent**

- Akbar, Sandra                                  Chicago, IL                                  Member
- Kosanovich, Matt                                Columbus, OH                                Member
- Petersen-Grosse, Chris                         Elkhart, IN                                  Member
- Wechter, Thomas                                 Glencoe, IL                                  Member

**TAP Staff**

- Block, Roy                                        Milwaukee WI                                Program Manager
- Smiley, Ellen                                    Milwaukee, WI                                Program Analyst
- Gabriel, Lisa                                     Milwaukee WI                                Program Analyst
- Robb, Patti                                       Milwaukee, WI                                Program Analyst
- Haywood, Annie                                 Milwaukee, WI                                Management Assistant

**Welcome/Announcements/Review Agenda (Werner)**

Mary Jo Werner welcomed everyone to the first monthly conference call for 2011.

**Roll Call (Gold)**

Quorum met.

### **Area 4 Chair Report (Werner)**

Werner welcomed the new members to Area 4. We are going to have a great year. Discussed approval of the December minutes; Steve Vanderver pointed out an error in the wording for Offer in Compromise. Minutes approved with noted correction.

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

DFO Donna Wess advised her office is hearing complaints from taxpayers regarding the backlog of First Time Home Buyer Credits (FTHBC). There are websites that help explain some of the information needed. But in essence we need all documentation to support the FTHBC. The Taxpayer Advocate Service (TAS) is getting ready for hardship refund requests via telephone calls from taxpayers. Some types of criteria for hardships requests are: foreclosure, eviction, and utility shutoff.

### **Outreach**

Everyone is encouraged to submit outreach reports to Ellen Smiley Analyst. The panel member's role is get information out to the general public about the Taxpayer Advocacy Panel (TAP). Everyone is asked to take part in outreach by adding something to improve Area 4's commitment to outreach.

### **New Issue Report (Granger)**

#### **19298 – Refund Delay, Customer Service**

Taxpayer was continually advised there was missing information, but no one could explain what was missing. This may be a training issue and should be pursued. Subcommittee: [Steve Vanderver, lead](#), [Harry Eng](#), [Mark Marshalek](#)

**ACTIVE - Medium**

#### **19447 – Toll Free Front Line Employees Make a Decision**

Committee agreed to combine this issue with issue 19298.

**COMBINE**

#### **19449 – Processing Problem Trust K-1 & Form 1041 Rental Depreciation**

Recommend issue be placed in Parking Lot. Area 4 submitted an issue last year regarding correspondence audits. Hold for response from IRS to prior issue.

**PARKING LOT**

#### **19453 – Notices: Confusing Wording on Joint Returns Filed**

The language in the notices is clear.

**DROP**

#### **19454 – New Tax Preparer Rules Should Apply to IRS Employees**

This is a customer service issue (Jackie File).

**PARKING LOT**

**19455 – Small Business Withholding Owed – IRS Does Nothing**

There are strong procedures in place for collection of payroll taxes.

**DROP**

**19456 – Form 1099–MISC Filing Alternate under Health Care Package**

Suggestion is unrealistic.

**DROP**

**Active Issues**

**16671 – Toll-Free and Customer Service** ([Kosanovich](#), lead, [Marshalek](#), [Brandewie](#), [Kelly](#), [Petersen-Grosse](#), [Granger](#))

Allowed time for members to review all the information received at the annual meeting. We will schedule time to discuss issue.

**16703 - Streamline Offer-in-Compromise (OIC)** ([Kosanovich](#), lead, [Mackie](#), [Werner](#))

Subcommittee's next step is to write up the issue. Good discussion with Sara Parton at the annual meeting and want to ensure all relevant points are included.

**18434 – Form 8868 Part II Signature** ([Hayden](#), lead, [Kelly](#), [Oetken](#))

Subcommittee will work on the referral and discuss on call next month.

**18611 – ERS / E-file Return** ([Hayden](#), lead, [Akbar](#), [PK](#), [Brandewie](#), [Vanderver](#))

There has been a lot of discussion by the subcommittee. We are currently waiting for a conference call with IRS subject matter expert. Discuss next month.

**18632 – Form 2290, Where to Send Depending on Filing Type** ([Granger](#), lead, [Vanderver](#))

Referral will be completed for discussion next month.

**18647 – Unenrolled Preparer to Represent in Collection (combined 16870 Required Testing Should Allow POA Status and E-Services)** ([Eng](#), lead, [Mackie](#), [PK](#), [Vanderver](#))

Completing referral for subcommittee to review; leave on agenda for next month.

**18851 – Get a Copy of CP 2000 Through E-Services** ([Akbar](#), lead, [Petersen-Grosse](#), [Kelly](#), [Mackie](#))

Discuss at next months meeting.

**19138 – Change Instructions for Form 720, Quarterly Federal Excise Tax Return** ([Oetken](#), lead, [Hayden](#)) Will complete write up for February's meeting.

**19259 – Form Needed to Notify IRS of Business Name Change** ([Eng](#), lead, [Werner](#), [Wechter](#))

Subcommittee will discuss.

## Parking Lot

### **17491 – Pub 587, UPE Deductions, Sch E vs. Sch F**

Ellen Smiley reviewed Publication 587 and it is not a misprint throughout the publication. Depending on taxpayer status, it could be a Schedule E (partner) or Schedule F (farmer).

**DROP**

## Responses Received from IRS

**17625 – Empowering Taxpayers: New Approach to VITA / TCE Tax Return Preparation** (Oetken, Vanderver)

**16728 – Marketing the Understanding Taxes Program** (Akbar, Rhyan, Vanderver)

Smiley advised both issues were accepted. Congratulations!

## Issue in Area 4 Quality Review

**18396 – Wording on Form W-4** (PK, lead, Werner, Turner, Eng)

Changed some of the wording and the issue will now go to Joint Committee Quality Review.

## Issues Approved by Joint Committee November 23, 2010

**16885 – Publications 15 / 15A** (Akbar)

Approved for elevation to IRS.

## Issues for Joint Committee Review on January 25, 2011

**16851 – Federal / State Tax Law Confusion** (Werner, lead, Kosanovich)

**17392 – Statement on Levy to Notify Employer of Amount to Be Paid** (Werner)

Werner will present both issues at the next Joint Committee meeting.

## Project Committee Highlights

- **Notices** – Reviewed 60 new notices IRS will be sending out.
- **VITA** – Had two accepted proposals, focusing on educating Taxpayers.
- **Forms and Pub** – No updates yet.
- **Communications** – First meeting scheduled for January 19, 2011.
- **EITC** – First meeting today after this call.
- **TAC** - First meeting next week January 25, 2011.

## Office Updates (Block)



EITC Awareness Day is January 28, 2011. Panel Member's role is to talk about TAP and listen to the Taxpayers concerns. Block encouraged each member to take part in this event. The survey results from the annual meeting were included in the pre-reads.

**Meeting adjourned**

**Next Conference Call is Tuesday February 15, 2011, 1:00 pm CT / 200 pm ET**