

## 2007 Meeting Minutes Area 5

- November 13, 2007
- October 9, 2007
- September 11, 2007
- August 14, 2007
- June 12, 2007
- May 6-7, 2007
- April 10, 2007
- March 13, 2007
- February 13, 2007
- January 9, 2007

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### **Area 5 Committee Meeting Minutes November 13, 2007 Teleconference**

#### **Designated Federal Official**

- Adams, Marian - Wichita, KS - LTA

#### **Committee Members Present**

- Bell, Sharon - Austin, TX - Member
- Bland, Sandra - Bemidji, MN - Member
- Freeman, Christopher - Chaska, MN - Member
- Guthmann, Howard - St. Paul, MN - Member
- Meyers, Robert - Omaha, NE - Member
- Stieger, Lee - Leavenworth, KS - Vice Chair
- Suther, Mary - Dallas, TX - Member
- Wright, Kenneth - Chesterfield, MO - Chair
- Wong, Warren - Rochester, MN - Member

#### **Committee Members Absent**

- Colvin, A. Elizabeth - Austin, TX - Member
- Rousseau, Richard - Harker Heights, TX - Member
- Shah, Rajiv - Scottsdale, AZ - Member

#### **TAP Staff**

- McQuin, Sandy - Milwaukee, WI - Manager
- Delzer, Mary Ann - Milwaukee, WI - Analyst
- Odom, Meredith - Brooklyn, NY - Note Taker

#### **Welcome**

Wright welcomed everyone and thanked all retiring members for all of their hard work.



### **Introduction of New Members**

Delzer informed the committee that the three new members who were alternates last year, were invited to participate in the call. Unfortunately, they were not available for the meeting.

### **Roll Call**

Quorum Met

### **Response Discussion on Issue**

#### **TAP 506-027-Forms and Publications Employee Background**

Sottile will address the committee after the Annual Meeting.

### **Area 5 Chair Report**

#### **Joint Committee Report-out**

Stieger shared with the committee what went on at the Joint Committee meeting. He reported that the Joint Committee agreed to elevate the issue Area 5 had sent up on "Address for Payment". Most of the discussion was based on preparations for the Annual Meeting and TAP Chair/Vice Chair Elections. Meyers encouraged everyone to vote if they haven't done so. Ballots went out via email.

### **Area 5 Annual Self-Assessment**

Delzer will provide the members with a self assessment form to fill out and return. This will go out to in a few days with a due date to return it.

### **Issue Discussion**

#### **TAC's**

Delzer sent out the recommendation written by Area 3 to go forward to the JC, which summarizes the work completed this year. Mosler asked Area 5 to review it and make any suggestions for improvement. The recommendation will go forward to the JC so there will be a formal recognition of what was accomplished with the group this year.

Guthmann had some suggestions for the proposal – Under Goal Statement, correct the spelling of the word "principal". Under Proposed Solution, he feels that everyone that was at the telephone conference with Tunley should have their names listed. In discussing taxpayer communications, it should include anything that was learned at outreach or any other meeting. Parking and bus line convenience should also be mentioned as a concern.

Meyers reiterated the Area 5 suggestion to collocate the TACs with other governmental services to make it more convenient to taxpayers. Delzer will ask Mosler to include additional points to mention location and mention that he heard about people with parking and bus availability.

Freeman mentions that everything is going online and he questions what will happen to the people that don't have internet access. The IRS should allow TAC employees to print these forms out for people that don't have internet access.

### **POA, Check Box Authority**

Further IRS input is needed on the issue.

### **Direct Deposit**

Bland suggests sending a letter stating that the committee would like to see something done on this issue. Wright feels that this is a legislative issue and this should be forwarded to Olson for consideration to included again in her yearly list of legislative recommendations.

### **Outreach**

Members are encouraged to continue outreach and send in the outreach reports.



**September: 18, five members**  
**October: 7, four members**

**ACTION Items**

Complete

**Issue Committee Highlights**

Ad Hoc – N/A

Notices – there are some notices that are waiting to be commented on. The copy write proposal is complete. The visually impaired taxpayer proposal was sent forward to the IRS and the committee is waiting for a formal written response

Communications – the committee is preparing for the Annual Meeting and setting agendas for the upcoming year.

VITA – the committee has completed their recommendations for changes in the training materials for the VITA program. A panel member worked with the UTS people on updates. The support for the VITA committee will be moving out of Milwaukee and going to the Brooklyn, NY office.

Burden Reduction – the committee is not as active as they were in 2006. The IRS hasn't provided the committee with many issues. The committee Chair discussed this with the Director and he is working on improving this committee.

**Office Report**

McQuin, on behalf of herself and Coston, thanked Mary, Bob and Warren for all they have done over the past few years.

Foley is on a detail to W&I and Robb is now Coston's secretary so there are only two people in the Milwaukee office. The Milwaukee office has a posting for a new Secretary. Coston posted for a new manager in the Brooklyn office and another analyst to do all the database work.

McQuin and Delzer are working with Patti Wagner, Liaison for W&I. There are only a few elevated recommendations that haven't been responded to but they are working on it.

Staff is working hard on preparing for the Annual Meeting.

Bell encouraged all members to complete the various surveys to insure TAP can continue to improve its processes.

**Public Input**

N/A

**Closing/Meeting Satisfaction Assessment**

Meyers thanked Suther and Wong for all of their help. Meyers will be at the Annual Meeting. He thanked the Milwaukee Staff for all of their help.

Suther thanked everyone and let them know she enjoyed working with everyone.

Wong thanked everyone and wants everyone to know that he appreciates the opportunity and learned a lot of different things.

Stieger thanked all retiring members. The meeting went well and he feels the year was very positive.



Wright encouraged everyone to complete the Annual Self Assessment.



**Taxpayer Advocacy Panel  
Area 5 Committee Meeting  
October 9, 2007**

**DFO:**

Marian Adams, Local Taxpayer

**MEMBERS ABSENT:**

Sandra Bland, Bemidji, MN - Advocate  
Chris Freeman, Pleasant Hill, IA  
Howard Guthmann, St. Paul, MN  
Bob Meyers, Omaha, NE  
Mary Suther, Dallas, TX

**MEMBERS:**

Kay Bell, Austin, TX

**STAFF:**

A. Elizabeth Colvin, Austin, TX  
Mary Ann Delzer, Program Analyst  
Rajiv Shah, Columbia, MO  
Sandy McQuin, Program Manager  
Lee Stieger, Leavenworth, KS  
Anita Fields, Program Secretary  
Rick Rousseau, Harker Heights, TX  
Warren Wong, Rochester, MN  
Kenneth Wright, Chesterfield, MO

***Welcome/Roll Call/Review Agenda***

Kenneth Wright welcomed everyone to the meeting. Quorum was met.

***Area 5 Chair Report--Wright***

**• Joint Committee (JC) Report-Wright**

Ken Wright mentioned to the committee that there will be a self nomination process for TAP Chair and Vice Chair. If you are interested please send an email to TAP Vice Chair Bob Meyers and also copy your Area Chair with a little background information. Anyone who decides they would like to run will be on the ballot. There will also be a nominating committee for the first time in TAP history. The committee will be composed of the TAP Vice Chair and one 3rd year member from each of the seven areas. The vote will be done by email before the annual business meeting.

**• IRS Responses**

**05-013 AMT Education**

Warren Wong was concerned about what happens after issues are sent to Joint Committee. What are the procedures for following up on issues? If the committee is not happy with responses from the IRS what do we do about it?

Mary Ann Delzer informed him that at the bottom of each response there was a list of options that the committee should use. Wong questioned who is responsible, Joint Committee or Area Committee? The rebuttal is the responsibility of the Area Committee.

Wong stated that in the TAP Mission Statement he didn't see anything anywhere that says that TAP has responsibility for education. Everything that we are talking about has to do with education.



Wright stated that the committee is an advocate for taxpayers and therefore the committee can discuss it.

Closed, Proposal Partially Accepted

#### Issue 05-022 IRS Partnering

This is the issue that was precipitated by the threatened closings of the TACs. IRS wanted to move to virtual TACs. Delzer reminded the committee the issue suggested the idea of sharing space with other agencies. Elizabeth Colvin stated that it would be great if the TAC offices would let VITA work out of their offices in regards to partnering. Sandy McQuinn stated that the committee should wait until the next TAB report and save that as a new recommendation. Wong asked for clarification on partnering. McQuinn stated that what they suggested in the recommendation was the idea of partnering with other governmental service agencies.

Closed, Proposal Accepted

#### Issue 05-037 Availability of Reward, Form 211

This issue is concerning getting more information to people about rewards for reporting tax fraud.

Closed, Proposal Partially Accepted

#### **Issue Discussion**

##### **Taxpayer Assistance Center (TAC) – Wong / Freeman**

Wong stated that Area 3 is supposed to take the lead on TAC. Wright wanted to know if we should keep this as an issue. Wright stated that the only unanswered question is Chris Freeman's strong desire to address accessibility issues in TACs. He proposed that they drop TAC from the issue discussion unless Freeman wants to address this at a later date as a separate issue. McQuinn wanted to know if the committee wanted her to pursue getting information back from Estelle Tunley on the issues that had already been forwarded. McQuinn will speak to Bernie Coston to work at getting some type of report.

Wong asked if it would be a good idea to have the TAC Issue Committee re-constituted for next year. McQuinn stated that it is really up to the IRS in terms of what resources they would put toward the issue committees. As of right now we are still waiting to see what issue committee we will have next year. McQuinn will pass on to Coston the idea of reconstituting the TAC Issue Committee.

##### **Address for Payment—Stieger**

There was a draft recommendation that went out to everyone for review.

(See [below](#)) Consensus to elevate as written.

##### **POA, Check Box Authority – Guthmann**

Delzer informed the committee on Guthmann's behalf that Nancy Ferree is still trying to get Jesse Gonzales to convince IRS counsel that this might be a good idea. The National Association of Enrolled Agents issued a release stating they did not agree to the extension of the Check Box Authority.

##### **Direct Deposit Incorrect Account – Bland**

Bland was not on the call. Delzer informed the committee that this issue is about refunds being deposited into the wrong bank account because the taxpayer provides IRS with the incorrect account number. A legislative change is needed to treat electronic payments the same way they treat checks that are mailed to the wrong person. Delzer is still trying to get someone from IRS to tell her the history as to why IRS no longer requires the banks to match account numbers and names. One solution is to write a letter to Nina Olson stating that this is a continuing problem because more people are e-filing and there are a lot of complaints regarding refunds going to the wrong account. Nina may want to include the issue in her annual report as a proposed legislative change.



***New Issues***

There are twelve new issues in the Contact History Report. A suggestion was made to table them and place them on the Area 5 agenda for the Annual Meeting. That was agreed upon by the committee.

***Outreach***

No outreach was reported.

***Action Items***

All action items were completed.

***Office Report-McQuin***

Sandy McQuin wants to thank Anita Fields, the TAP secretary in Florida, for taking minutes today. Barbara Foley is also on a detail so the office is really short handed, but we are doing our best and staying above water. Delzer stated that she sent an email reminder about getting the outreach reports in to her. It is very important especially if you want your reports included in the 2007 TAP Annual Report. All the report needs to contain is "who, what, when, where, and how many." The form is located on TAPSpace for those who need it.

***Public Comment***

No one from the public was on the call.

***Closing/Assessment—Stieger***

Lee Stieger stated that the committee had a pretty lively discussion and settled several issues. It seems that we are starting to plan for next year. The attendance was a little low again and we need to do more/report Outreach.

**Meeting adjourned**

**Next meeting November 9, 2007, 9:30 a.m. CT**

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**Joint Committee Issue Referral Form**

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**TAP Committee:** Area 5

**TAP Contact Number:** 3534

**Title:** Address for Tax Payments

**Date Approved by Committee:** 10/09/2007

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**Members of Subcommittee/Author(s):** Lee Stieger, Christopher Freeman, Kay Bell

**Issue Statement:** Internal Revenue Service (IRS) payments and forms submitted by mail now go to multiple addresses. Due to the continuing IRS reorganization, in many instances these addresses are confusing and counterintuitive to taxpayers.

**Goal Statement:** Provide individual taxpayers who file and who make tax payments by mail with one resource listing the appropriate addresses for submitting those payments and associated tax forms.



**Proposed Solution:**

1. Improve IRS website search capability so that keyword search for "payment" provides taxpayers with direct link to payment addresses.
2. Provide on the IRS Web page access to payment information via a featured navigation box.
3. Make an IRS publication (similar to Pub. 3891) with a unified list of all possible mailing addresses for individual returns and payments.

**Background, Research, and Analysis:** The IRS's primary job is to collect tax money. To that end, the IRS should help ensure that willing taxpayers wanting to file paper returns and to make payments should be able to do so as easily as possible.

Currently the IRS, via its website, thoroughly addresses nonpayment issues, but not payment inquiries. Online searches using the keyword "payment" now link to "nonpayment" solutions. Taxpayers looking simply for a mailing address are forced to do additional online searches to find information that answers their actual payment question.

Access to such information is critical in light of IRS continuing reorganization. As exhibited in IRS Publication 4038 (2008 return processing migration; individual returns on page 2), the IRS has been consolidating the processing of business and individual tax returns in its existing campuses. These continuing changes have resulted in taxpayer confusion for some taxpayers who file by mail.

Simultaneously, the IRS has been encouraging taxpayers to file and pay their taxes electronically. Despite this effort, a large percentage of taxpayers still submit their returns on paper and pay by checks sent via mail. According to IR-2007-100, issued May 15, 2007, the agency expects about 58 percent of all 2007 returns to be e-filed. That leaves 42 percent filed by mail.

Ideally, taxpayers who choose to file returns by mail would use the appropriate envelope (either for a 1040 with a payment or a 1040 without a payment) provided in the 1040 paper filing packet. However, from the time taxpayers receive this material in January until they file their returns, possibly as late as October, they often misplace the pre-printed envelopes and/or labels. Although taxpayers, who lose the envelope, can find address information in the 1040, 1040A and 1040EZ instruction booklets, not all taxpayers retain these documents.

Even taxpayers who prepare their returns electronically using tax preparation software often choose to print out and mail their returns and payments. These taxpayers do not have easy access to the appropriate address to which to send their material.

In addition, different filings require taxpayers to use different mailing addresses. This is the case for individuals who file both 1040 and 1040-ES forms at the April deadline. It is not uncommon for such filers to send both to the same address if they do not have access to the correct mailing addresses for each.

Payment information also is needed by taxpayers year round, not just in the usual January-to-April filing season. Millions of filers annually seek filing extensions; millions more pay estimated taxes throughout the year. The mailing addresses for such filings and payments should be easily accessible on the IRS website.

Since the IRS has this mailing information, we recommend that the agency compile it in a single document, available online as well in print form, if requested, for individual taxpayers.





The IRS already has produced such a document for tax practitioners (IRS Publication 3891, Lockbox Address Directory, <http://www.irs.gov/pub/irs-pdf/p3891.pdf> ). This 24-page publication details for professionals where to mail their clients' individual 1040, 1040A, 1040-EZ, 1040-ES, 4868 forms, as well as several business returns (Forms 940, 940PR, 941, 941PR, 941SS, 943, 943PR, 944, 944PR, 944SS, 945). Mailing information for estates and trusts filings (Form 1041-ES) and heavy vehicle use taxes (Form 2290) also is included in IRS Publication 3891.

A similar document for individual taxpayers would reduce taxpayer confusion. It also should reduce the number of telephone calls and in-person assistance visits regarding this matter.

Like Pub. 3891, the proposed new individual mailing address publication would be accessible as a PDF document at [www.irs.gov](http://www.irs.gov). We recommend that it also be linked from the IRS home page.

Taxpayer Assistance Centers (TAC) staff should be made aware of this document and make it available to taxpayers.

**Benefits and Barriers, Including Impacts of the Proposed Change:** There are several benefits to the IRS providing a consolidated list of mailing addresses for individual tax filings and payments.

Judging from 2007 IRS filing estimates (IR-2007-100, cited previously), more than 50 million taxpayers potentially could have questions about where to mail their returns. While the IRS intends to continue and expand its electronic filing services, the agency's acknowledges that a large number of taxpayers are not able or willing to utilize online services at this time or in the near future. The IRS, therefore, must maintain its commitment to providing services to all taxpayers, including those who use more traditional filing methods, in order to reduce taxpayer burden and enhance voluntary compliance.

By having taxpayer mailing address information readily accessible online, by phone or at TACs, the IRS would better meet the needs of those filers.

The agency also could see an added benefit with regard to its customer service. The issue of what address to mail a return and/or payment is viewed by most taxpayers as a basic, simple request. By readily providing the requested information, IRS representatives would indeed show that the agency is able to quickly answer such simple queries.

Giving taxpayers better access to address information also would allow the agency to do what it is designed to do: collect payments and filing data from compliant taxpayers. Any steps the IRS can take to facilitate this benefits not only the agency, but the taxpaying public.

Further, by helping taxpayers submit their forms and payments to the correct campus, the IRS would be relieved of forwarding misdirected filings and payments.

The Taxpayer Advocacy Panel also recognizes there are some barriers to the proposed new document, most notably the cost to print the publication. However, we believe that printing requirements would be minimal. In most cases, taxpayers, even those who file by paper, are accustomed to getting informational material online.

With regard to the IRS website, we realize that space on the home page is at a premium. However, all that is required is one text link. The IRS currently maintains year-round a forms and publications section in the upper left corner of its website home page. We believe it would be worthwhile to replace one form link with a permanent link to payment information.



Also, a keyword search of "payment" should include reference to where payments should be made. Now when a taxpayer conducts an online search for "payment" information, the taxpayer is directed to links that discuss "nonpayment" solutions. For example, a search for "payment" takes the taxpayer to extended-pay options, such as the installment payments. While this information is important, it doesn't address the needs of taxpayers who simply want to pay their tax bills today.

A nominal barrier is acquainting IRS phone representatives and TAC personnel of the new document's existence. This should take minimal training, so there should be negligible costs in this area.

Overall, the costs to the IRS should be minimal, and would be greatly offset by the service to taxpayers and the more expeditiously collected filings and payments from those individuals.



**Taxpayer Advocacy Panel  
Area 5 Committee Meeting  
September 11, 2007**

**DFO:**

Marian Adams, Local Taxpayer Advocate

**MEMBERS:**

Kay Bell, Austin, TX  
Sandra Bland, Bemidji, MN  
A. Elizabeth Colvin, Austin, TX  
Bob Meyers, Omaha, NE  
Lee Stieger, Leavenworth, KS  
Warren Wong, Rochester, MN

**MEMBERS ABSENT:**

Chris Freeman, Pleasant Hill, IA  
Howard Guthmann, St. Paul, MN  
Rick Rousseau, Harker Heights, TX  
Rajiv Shah, Columbia, MO  
Mary Suther, Dallas, TX  
Kenneth Wright, Chesterfield, MO

**STAFF:**

Mary Ann Delzer, Program Analyst

**GUESTS:**

Dan Fretheim, Decorah, IA

**Welcome/Roll Call/Review Agenda**

Lee Stieger welcomed everyone to the meeting. Quorum met.

**Area 5 Chair Report--Stieger**

- **Joint Committee (JC) Report-Meyers**

One issue from Area 6 was elevated. Also discussed the meeting several members of the TAP had with Acting IRS Commissioner Brown. Brown was very welcoming and well briefed about TAP. You can see the information packet given to Brown on TAPSpace. The members also met with Wage and Investment (W&I) Commissioner Morgante. Morgante committed to identifying Issue Committee program owners prior to the TAP meeting in December. He also discussed his commitment to speed up the process of TAP receiving responses to issues elevated to W&I. He also stated he plans on participating in the annual meeting. TAP members were very pleased with the meeting. The one caution is that both gentlemen will be leaving IRS soon and we will then have new executives to work with.

- **IRS Responses**

Delzer explained that Area 5 received two responses from IRS; AMT Education and IRS Partnering. Members need to decide how to close the issues or respond back to the IRS and ask for further



consideration.

Meyers stated he felt the AMT issue was partially accepted by IRS as not much more can be done by IRS to inform taxpayers about AMT.

Bell shared that with the current Congressional hearings; this will continue to be on IRS radar. Wong questioned whether IRS is really pushing AMT education enough and perhaps TAP should restate the position. Meyers stated that if members have continuing concerns about the responses received from the IRS, they should consider preparing an Area 5 response to send back to the IRS.

**ACTION: Area 5 members to review the IRS responses regarding AMT Education (05-013) and IRS Partnering (05-022) and be prepared to discuss at the October meeting. TAP members unhappy with IRS responses should be ready to volunteer to prepare an Area 5 response.**

- **Area 5 Response to TAP 506-027-Forms and Publications Employee Background**

Wright reviewed that last version of the draft.

**ACTION: Subcommittee to send Delzer final version of the response to issue TAP 506-027-Forms and Publications Employee Background.**

**ACTION: Delzer to email Area 5 response to issue TAP 506-027-Forms and Publications Employee Background and members to provide approval/disapproval via email.**

#### **Issue Discussion**

- **Taxpayer Assistance Center (TAC) – Wong / Freeman**

Wong reported that the other areas have taken responsibility for this issue. He does not believe the issue is being worked properly as he does not know what the process is. Delzer explained that emails have been exchanged and the process is happening. Area 3 analyst Chavez is forwarding TAC issues to the Director of Field Assistance on a regular basis. Wong remains unsatisfied with this explanation and would like clarification of how the process works.

**ACTION: Delzer to email TAC written issue elevation process to Area 5 members.**

- **Address for Payment – Stieger**

Stieger reported that the subcommittee has not been able to get together to finalize the draft. Wright reviewed the recommendation and provided good comments. Bell stated they hope to have a recommendation ready to discuss for elevation next month.

**ACTION: Address for payment subcommittee to meet and finalize recommendation for consideration at October meeting.**

- **POA, Check Box Authority – Guthmann**

Delzer reported that Area 3 is still waiting for a response from IRS program owner Jessie Gonzalez. Delzer will continue to monitor the issue.

- **Direct Deposit Incorrect Account – Bland**

Bland shared that Delzer provided the subcommittee with information regarding a W&I task force regarding this issue. Many of the items listed seem to address the concerns we have heard. Prior to 1996, IRS required the name and account number to match before the deposit could be made. This seemed to work much better. Stieger said he had read that one reason IRS was doing the match was



that it was necessary for the taxpayer to provide the IRS more information for identification.  
**ACTION: Delzer to set a time/day for Direct Deposit subcommittee meeting.**

### **Outreach**

Stieger encouraged all Area 5 members to send their outreach reports. Delzer encouraged all to send their reports now, even for the earlier months of the year. Even if they appear to be late, they will still be rolled up into the annual report for 2007.

### **Issue Committee Highlights**

Stieger-Notices-committee has been busy processing a large batch of notices using the DAT scoring. Also are continuing to work on the "stuffer" reduction project to reduce mailings costs.

Bell –Internal Communications-surveys of panel members have been completed. If you have not yet done so, please update your biography on TAPSpace.

### **Office Report-Delzer**

Delzer reported that Coston is holding a meeting this week in Seattle with his Managers and Senior Analysts to plan the annual meeting, as well as other planning for next year

### **Public Comment**

Dan Fretheim joined the call. He is an attorney in northeastern Iowa, specializing in business law, with an emphasis on tax.

### **Closing/Assessment—Stieger**

Stieger thanked Delzer for assisting with the call. He thanked the panel members present for the good discussion.

### **Meeting adjourned**

**Next meeting October 9, 2007, 9:30 a.m. CT**



**Taxpayer Advocacy Panel  
Area 5 Committee Meeting  
August 14, 2007**

**DFO:**

Marian Adams, Local Taxpayer Advocate

**MEMBERS:**

Kay Bell, Austin, TX  
Sandra Bland, Bemidji, MN  
Howard Guthmann, St. Paul, MN  
Bob Meyers, Omaha, NE  
Rick Rousseau, Harker Heights, TX  
Rajiv Shah, Columbia, MO  
Lee Stieger, Leavenworth, KS  
Mary Suther, Dallas, TX  
Kenneth Wright, Chesterfield, MO  
Warren Wong, Rochester, MN

**MEMBERS ABSENT:**

A. Elizabeth Colvin, Austin, TX  
Chris Freeman, Pleasant Hill, IA

**STAFF:**

Sandy McQuin, TAP Manager  
Patti Robb, Note Taker

**GUESTS:**

Lovella Richardson, Knoxville, TN

**Welcome/Roll Call/Review Agenda**

Ken Wright welcomed everyone to the meeting. Quorum met.

**Area 5 Chair Report--Wright**

- **Joint Committee (JC) Report**

Bob Meyers reported that five Joint Committee (JC) members will be meeting with the acting Commissioner Kevin Brown, newly appointed Acting Commissioner Linda Stiff, and National Taxpayer Advocate Nina Olson. Sandy McQuin said no elevated issues were discussed at the JC meeting. The area chairs all agreed that they would poll their committee members to get input about the chair and vice chair elections at the next annual meeting. The big issue was whether the new members should vote for the TAP chair. Some of the new members admitted they would prefer not to vote as they really don't know who anyone is. Some members felt the election of the TAP Chair before the annual meeting would be a good thing. The chairs are to get feedback to present to the whole JC at the next Joint Committee meeting. This will help to determine the process for the upcoming elections. There was some talk about having a nominating committee. The Communication Committee has some feedback from evaluations at the last annual meeting and that will also be brought up at the next JC meeting.

**ACTION: McQuin will forward the Area 5 recommendation from last year to Wright.**

Meyers thought that Area 5 previously recommended that the chair and vice chair elections be held before the committee chairs are elected. McQuin said the outgoing members felt they knew each other pretty well, so one thing discussed was should the outgoing members vote at the elections. The new members would still get to vote three times as they could vote the year they rotate off. Wright was concerned that the nominating committee might only nominate one person. There should be at least two people nominated. Howard Guthmann thought the nominating committee would secure the very best people. The chairs only serve for a very short term. However, the nominating committee should be made up of panel members as well as a few staff. Warren Wong likes the ideas of a nominating committee. Wright said if there are any objections to a nominating committee let him know. He will write it up and present it that way. Should the election be done before the annual meeting? Rajiv Shah said some of us don't know other panel members so how would we know who these people are. Wright envisioned that those running would have an opportunity to campaign. They would be available via email or you could call them. They should also post their biography and picture on TAPSpace. Meyers said he is opposed to an election being done before the annual meeting. Holding the election during the annual meeting gives people a chance to meet the candidates. He feels the outgoing members should not be voting for chair or vice chair as they will not be working with them. Meyers felt very strongly that there needs to be a call for leadership so people interested in running would not be left out of a nominating committee process. Mary Suther works on seven boards and said they all use a nominating committee. They are all elected before new people come on so when they do come on, the key people are already identified. Lee Stieger approves the process to vote for the chair and vice chair before the meeting. The new people will still have a chance to meet the new officers even though they are not electing them.

**ACTION: Wright will send out an email asking for input about the elections and members should respond to him. He will send out the scenarios discussed during the conference in order for members to comment.**

#### **Response to TAP 506-027 Forms and Publications Employee Background**

**ACTION: McQuin will get a copy of original recommendation TAP 506-027, Forms and Publications Employee Background, and Sue Sottile's response will be sent out.**

Bob Meyers, Sandy Bland, Rajiv Shah, and former panel member Steve Landauer were on this subcommittee. This issue will be tabled until the above information can be sent out.

#### **Issue Discussion**

- **Toll Free Issues - Guthmann**

The subcommittee had a meeting and decided they could not come to a solution

**ACTION: Drop toll free issue.**

- **Taxpayer Assistance Center (TAC) – Wong / Freeman**

Chris Freeman is going to rough out a position paper. McQuin said Area 2 and 3 will be writing up the accomplishments of this committee. Reports with TAC issues from the database have been going to Estelle Tunley each month. McQuin said Freeman is working on a position paper showing what an ideal TAC should look like including accommodations for disabled taxpayers.

- **Address for Payment – Stieger**



Stieger reported that the subcommittee met. Kay Bell and Delzer got significant information while at the Chicago Tax Forum. The committee is moving but changing direction again. We don't think we will be able to change the IRS policy about having different addresses. They do need a new or better way to communicate with the public though. We plan to have another subcommittee meeting. Bell is writing up a position paper and the subcommittee will review before presenting to the whole committee for approval.

**ACTION: Address for payment will be put on next meeting agenda to approve for elevation to JC.**

- **POA, Check Box Authority - Guthmann**

McQuin said Delzer followed up with Area 3 regarding expanding the time covered by the Power of Attorney (POA), Check Box Authority. They are waiting to hear back from Counsel. Delzer talked to TAP Manager Nancy Ferree last week and she said they are in waiting mode right now. Suther was on the POA conference call and said it was excellent. She said she did not get any questions in because you had to email your questions in during the call.

**ACTION: POA, Check Box Authority will be put on the next meeting agenda.**

- **Direct Deposit Incorrect Account - Bland**

Sandy Bland said she spoke to several managers at credit unions. The operations manager at her credit union said several years ago they would get a mismatched name control list and it was about two pages long. Now it is several pages with several hundred names. The Upper Midwest Clearing House Association safeguards and has rules about direct deposit. She went to their website, [Umacha.org](http://Umacha.org), but there are a lots and lots of rules and she did not have time to read them all. The Social Security Association (SSA) also has direct deposit and is able to pull back errant deposits. Delzer has not finished doing research for Bland yet.

**ACTION: Direct Deposit Incorrect Account will be put on the next meeting agenda.**

### **Outreach**

Three outreach reports were turned in this month. A reminder was sent out but a couple outreach reports were turned in after the agenda was sent out. They will be added to next month's report.

### **Office Report**

Chris Freeman will be moving from Iowa to Minnesota. Coston approved keeping him on the committee. Now it is up to Freeman.

### **Issue Committee Highlights**

Kay Bell - Communication Committee – the member surveys were completed. The reports will be submitted to the full committee next month. She said she was able to represent the Communication Committee and the Area 5 Committee at the Chicago Tax Forum earlier this month. Annie Khan from Area 4 was also there. There seemed to be a lot of interest in the panel. One major issue was the confusion between TAS and TAP. McQuin added that this was the first forum where people really did know about TAP. Some even expressed an interest to sign up for TAP. Meyers added that the Communication Committee is continuing to work on TAPSpace and improveirs.org.

Sandy Bland – VITA – we are down to three issues; Branding, Training, and E-filing with Practitioner Personal Identification Numbers (PIN). The IRS is doing away with Form 8453, U.S. Individual Income Tax Declaration for an IRS e-file Return. We are approving the use of the practitioner PIN. TaxWise is





now available online although some problems are being encountered. We are recommending that they add routing numbers as a pull down menu.

Rajiv Shah – Burden Reduction – we are working on the tax gap reduction; how to reduce burden on small businesses while helping them report more accurately what they earn. We have a conference call to discuss this issue. A few members are showing resistance.

Mary Suther – Notices – we have been scoring new notices. We have three to score in the next month and six were scored in the last period. Stieger added that they just received a few more notices to score.

### **Office Report**

Patti Robb has been selected to be the Director's secretary. John Fay, Senior Analyst in Washington, DC, is leaving for a new job. Recruitment – the list of names will be going to National Taxpayer Advocate Nina Olson this week. TAPSpace – the expectation is that **ALL** members and staff will use this vehicle for discussions and sharing of information.

### **Closing/Assessment—Stieger**

Really great meeting; a lot of information was shared. We closed one issue and are moving forward on the others.

### **Meeting adjourned**

**Next meeting September 11, 2007, 9:30 a.m. CT**



**Taxpayer Advocacy Panel  
Area 5 Committee Meeting  
June 12, 2007**

**DFO:**

- Marian Adams, Local Taxpayer Advocate

**MEMBERS:**

- Sandra Bland, Bemidji, MN
- Chris Freeman, Pleasant Hill, IA
- Howard Guthmann, St. Paul, MN
- Bob Meyers, Omaha, NE
- Rick Rousseau, Harker Heights, TX
- Lee Stieger, Leavenworth, KS
- Kenneth Wright, Ashland, MO
- Warren Wong, Rochester, MN

**MEMBERS ABSENT:**

- Kay Bell, Austin, TX
- A. Elizabeth Colvin, Austin, TX
- Rajiv Shah, Columbia, MO
- Mary Suther, Dallas, TX

**STAFF:**

- Mary Ann Delzer, Program Analyst
- Patti Robb, Note Taker

**Welcome/Roll Call/Review Agenda**

Ken Wright welcomed everyone to the meeting. Quorum met.

**Area 5 Chair Report--Wright**

- **Joint Committee (JC) Report**

Meyers reported that the JC approved two recommendations and one was returned to an area for more work. The next face to face meeting for the JC meeting will be June 25-26 in Denver, CO. Coston sent out a national office report and that can be found on TAPSpace. Over 300 applications have been received for TAP. The TAP annual report is being edited at this time. Sue Sottile and Bob Erickson from Forms and Publications, joined the JC meeting and have asked if they could join future JC meetings. They also requested being on the Area 5 call in July.

## Issue Discussion

- **Taxpayer Assistance Center (TAC)**

Guthmann/Wong---The subcommittee of Areas 2, 3, and 5, met with Estelle Tunley, Director Field Assistance, who told them how the TACs are run. She had good answers to everything brought up about the TACs. She candidly and flatly said they are experiencing problems and would like TAP to help with the resolution. There will not be an issue to elevate since she agreed to hear TAP recommendations directly. This call was refreshing as the responsible person admitted there were problems and indicated that she is willing to listen to our recommendations and is looking forward to working with TAP. More informal process, but is very impressive. Delzer thought this could be an extension of the TAC issue committee next year, since TAP will be have completed work on the surveys.

Meyers said the issue about closing the TACs will be brought up when they meet with the Commissioner. Tunley has reported that no TACS will be closed at this rime.

Freeman said despite the process worked out with Tunley, TAP should go on the record talking about how important the TACs are.

Wright feels the focus seems to have changed. TAP does not need to be an affirmative supporter of the TACs. Freeman disagreed, stating that the openness of Tunley to working with TAP is a separate matter from TAP's supporting the role of TACs and that we should still work on developing a position paper. Wright then agreed with Freeman. Guthmann also agrees that a position paper should be prepared and elevated. Should also thank Estelle Tunley in the paper as well.

Freeman thinks TAP should recognize the good things done by the TACs. He is working with Senator Harkin and is looking at the various aspects of the American with Disabilities Act and the impact on the TACs. Freeman will prepare a draft of the position paper.

**ACTION: Delzer to forward minutes from the last TAC subcommittee meeting, and subsequent emails, to Freeman.**

- **Toll Free-Guthmann**

Would like to see the toll free issues handled in a similar way as the TAC issues. This would be a good model to follow. Would like to meet with the toll free subcommittee to identify issues and find out who the person responsible at the IRS. We could send issues immediately with a proposed solution.

**ACTION: Toll free subcommittee to meet and discuss using the TAC issue model for toll free issues.**

- **Address for Payment – Stieger**

Stieger has been involved in the Notice committee and has not been able to address this issue. He will report in July.

- **POA, Check Box Authority - Guthmann**

The IRS is still considering the original recommendation. Guthmann recommended Area 5 wait for the IRS response before going any farther with this issue.

- **Direct Deposit Incorrect Account-Wright**



This is an issue in the parking lot and Delzer has done some preliminary research. Wright stated he has great concern over direct deposited refunds that go into incorrect bank accounts.

Marian Adams stated that TAS receives these issues when a taxpayer puts down the wrong account or routing information on their tax return. IRS does not get involved as the taxpayer made the error, not the IRS. The taxpayer would need to resolve this issue themselves with the banks. If the deposit is returned to IRS by the bank, the IRS will issue the taxpayer a paper check. If the bank has an account with the number, even if the name does not match, sometimes it still gets deposited into that numbered account. You must ensure the account number is correct on the return when the refund is to be electronically deposited. The NTA feels the IRS does have the authority to pursue these refunds deposited erroneously in the wrong account. If the IRS wants to have the benefit of reducing costs and speeding up refunds, they should assist taxpayers who have this problem.

Meyers stated that it seems that if I don't get my refund and can find that I put the wrong account information, I should be able to approach the bank and work it out with them.

Wright shared that if it is the bank's error they will correct it, but that they are under no obligation to do anything if it was the taxpayer who listed an incorrect account number. We need to recommend that the bank match the account number with the name as was done prior to 1996. Feels this is an issue that should be looked at. Subcommittee: Bland, (lead), Wright, Guthmann, Stieger, **ACTION: Direct Deposit Incorrect Account subcommittee to meet and determine research needed to proceed.**

#### **Action Item Review**

**Subcommittee to write response to IRS regarding Issue 506-027. Subcommittee members are Shah (Chair), Bland and Meyers.**

Meyers will send draft response to Area 5 members before June 25, Joint Committee meeting.

#### **ACTION ITEMS to Carry Forward to July**

**Bell will send out a copy of the information she received about IRS addresses on the internet.**

**Freeman/Wong will coordinate the position paper subcommittee on TACs and will have draft prepared for August meeting.**

**Guthmann will research on how SSA handles a refund deposited into the wrong account and report back to the full committee in July.**

**If possible, Stieger to mail DAT spreadsheet to Wright.**

**Address for Payment subcommittee to hold a conference call before July Area 5 meeting. Subcommittee members are Stieger (Chair), Bell and Freeman.**

#### **Office Report-Delzer**

The staff has begun interviewing the new applicants and that will continue over the next three weeks. The Milwaukee office needs to complete 33 interviews.

#### **Public Input**

None

#### **Closing/Assessment—Stieger**

Had a good call today and discussed a lot of good information. A couple of us did not complete our work this month, but as an Area we are making progress.



Meeting adjourned

**Next meeting July 10, 2007, 9:30 a.m. CT**



**Taxpayer Advocacy Panel  
Area 5 Committee Meeting, Kansas City, MO  
May 6-7, 2007**

**DFO:**

- Marian Adams, Local Taxpayer Advocate

**MEMBERS:**

- Kay Bell, Austin, TX
- Sandra Bland, Bemidji, MN
- Chris Freeman, Pleasant Hill, IA
- Howard Guthmann, St. Paul, MN
- Bob Meyers, Omaha, NE
- Rick Rousseau, Harker Heights, TX
- Rajiv Shah, Columbia, MO
- Lee Stieger, Leavenworth, KS
- Kenneth Wright, Ashland, MO
- Warren Wong, Rochester, MN

**MEMBERS ABSENT:**

- Elizabeth Colvin, Austin, TX
- Mary Suther, Dallas, TX

**STAFF:**

- Bernie Coston, TAP Director
- Kayla Walker, Acting TAP Manager
- Mary Ann Delzer, Program Analyst
- Patti Robb, Secretary

**VISITORS:**

- Gene Meyer, Business Reporter, The Kansas City Star

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**Sunday, May 6, 2007, 3 to 6 p.m.**

**Welcome/Roll Call/Review Agenda**

Ken Wright welcomed everyone and called to the meeting to order.

**Directors Comments**

Bernie Coston welcomed everyone to Kansas City. He introduced Kayla Walker, acting program manager in Milwaukee. Sandy McQuin is on a detail as the Director of Low Income Taxpayer Clinics (LITC). Walker attended the Area 4 face-to-face meeting in Milwaukee early in May. She has also



been on several conference calls. Walker said she is from Little Rock, Arkansas, and has been with the Internal Revenue Service (IRS) for about 18 years. She has been in Examination, Taxpayer Service, Collection, and currently the Taxpayer Advocate Service.

Coston announced that he has positions open for a senior analyst and secretary and the job announcements will be posted next week in the cities of Washington, D.C., Brooklyn, Florida, Milwaukee, and Seattle.

Commissioner Everson submitted his resignation and will be going to the Red Cross as Chief Executive Officer and President. We aren't sure what we are going to do about the panel members meeting with the Commissioner. We don't know who will be acting until a new Commissioner is appointed.

Recruitment went very smoothly this year. We had the online application program set up where people could only apply in a state where we were recruiting. We got applications from every state where replacements are needed, including five final applications from Puerto Rico. We are going to the Florida office to rank the applications next week. We will pick out the most qualified and then we will start the telephone interviews. We will be coming out with a request for panel members to assist in the interviews. We continually look at the demographic representation in TAP. We take efforts to contact different groups from different areas; minority, fraternal, etc, to let them know about TAP. We will have to wait to look at the applications next week to know if we were successful.

For the Annual Meeting, we have already identified a hotel – the Fairmont Hotel in Georgetown. We looked at several different time frames but the only one that fit was the week of December 11-14, 2007. If a new commissioner has not been appointed by then, we will have the acting commissioner speak.

Coston has been going to all the area face-to-face meetings. An issue brought up across the board was the lack of response from the IRS to elevated issues. We are looking into getting updated information and I am also going to set up a meeting with the other organizations and request service level agreements with them. Some elevated issues have been sitting out there for two years and that is unacceptable. We asked the liaisons to get our recommendations to the right person. We don't know where the hold up is but the bottom line is, regardless if a responsible organization feels the issue is good or not, we deserve a response. My commitment to the Joint Committee is that we will have a hard status on where we stand on all the outstanding issues by June 30.

As far as budget concerns, we are working at a slight deficit. This year participation at face-to-face meetings has jumped and we have few vacancies. We are hosting Town Halls this year as well as the Tax Forums. This year, TAP will have their own focus group at the forums and that will afford us a chance to get more issues. This is an excellent opportunity to solicit information from practitioners. Normally you go to the taxpayers.

Freeman asked about issue committees. He said he was not asked what committee he would like to be on. Would like information, busy months, what they work on, what they look at, etc, regarding each issue committee and you may get a better fit and find someone who really wants to participate. Meyers said three years ago all the program owners spoke and talked about their issues but it took too much time and was too much information. It's time for the IRS to come to the table. Stieger said he was put on the Notices committee and never would have picked it initially, but is very happy to be on it now. He will probably ask to be on it again next year. The program owner is very active with us and all the members feel validated.

### **Chair Report--Wright**

The JC discussed a proposal for a gold star award for IRS employees who provide service to TAP. They are also looking at the process for elevating issues. The quality review committee is to look at recommendations and make format and grammatical changes, not technical changes. Then the issues go to the JC and are discussed and either forwarded or sent back to the committee of origin. Part of the discussion was the need for each area to do their homework upfront. The other concern was that



the recommendations need to be posted onto TAPSpace in a timely manner so they can be reviewed before the JC meeting. Meyers, JT Wright (TAP Chair) and Coston talked about how to improve the process. The issue should be posted to TAPSpace and questions should be sent back to the responsible area. They can make the revisions and answer the questions, then it goes to the quality review, then it goes to the JC for elevation. Questions at this point should be very minor. This will be better in the long run. This is the process that is going to be submitted to the Joint Committee for their consideration.

Coston added that the JC is looking at doing a position paper to be presented to the Acting Commissioner. They have already started looking at potential issues. The Taxpayer Assistance Blueprint (TAB) report made different recommendations about how taxpayers should be served in the future and TAP will be writing some strategies or rebutting some TAB recommendations. Last year the Commissioner gave TAP some issues for feedback and you came back with a great paper. This can go a long way showing the value of TAP.

### **TAP Communication Strategy**

- **Area Responsibilities**

The Communications Committee is charged with helping TAP get the word out. This strategy is a living document and is being revised and updated as needed. The document lists all current communications actions, party assigned, priority, timeline (frequency) and a target completion date. The goal is to make this process more standardized so it can be used as a guide. It is on TAPSpace so it is available to review. One is high priority, with five as a low priority. This is not written in cement and we want to make a document that works best for TAP. Please review this document tonight and can discuss it tomorrow under new issues. Delzer pointed out that the Area 4 committee reviewed this document and then came up with a outline for their outreach strategy. She also thought that completion date should be looked at. Some have specific dates (annual report) and other run seasonally like recruitment but without specific dates.

- **Individual Outreach Reports**

The Outreach Activity Report for Area 5 was handed out. There were 72 individual reports. Several members admitted they had done an outreach but have not submitted a report. Our commitment was to remember to do the reports after these contacts. Meyers said you can get some really rich feedback when you do them one-on-one. You may not get anything from them at that very moment, but you never know when they will end up contacting an office with an issue. It could be likened to planting a seed. Coston reminded everyone that outreach can take on many forms. Does not matter how you do it or what you do, it's a matter of reporting it. We need to recognize that outreach is being done. Meyers shared that Gil Yanuck is going to bring TAP lapel pins to the next meeting. They are looking to develop a pin with the TAP logo on it. We are looking for things to do to bring further attention to TAP.

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**Monday, May 7, 2007, 9 a.m. to 4 p.m.**

### **Welcome / Announcements / Review Agenda**

We need to focus on substantive issues and get some recommendations forwarded to the IRS. That is our mission. Coston shared that the members may want to consider that TAP matured and we may be getting to issue saturation. Some of the same issues come up time and again. Maybe you should look at an innovative way to look at issues that affect taxpayers. Meyers stated that in his first year Area 5 worked on TACs because they heard IRS was closing some. We did a lot of work and suggested the IRS partner with other agencies. They did not close them and now they have decided





they are going to close some of them again. Maybe we should address our original recommendation. Coston said that TAP maybe should think about expanding on issues currently out there. We put so much emphasis on being as brief as possible, may want to take a harder look at some of these. Issues faced by elderly, non-English speaking, VITA sites are seeing more complicated returns, IRAs, mutual fund payouts, retirement, and stock options. VITA used to only fill out basic returns. The commissioner just approved extra money to go to VITA and with that will come extra duties and responsibilities. Think about this especially if you are taking care of your parents. VITA is only open for a few months a year. What happens when these clients receive a notice? Where do they go? How do they contact the volunteer that did their return? The population has changed, the dynamics have changed. Meyers asked if this was a legislative issue. Coston stated as far as VITA was concerned, that is a procedural change. As far as AMT is concerned, it is legislative to a point. Are people using the proper forms – doing the right calculation? What if you used the wrong worksheet? Another type of impact is the growing population of people with disabilities. Marian is working with the Real Economic Impact Initiative. This is an emerging type of issue. We have a large group of women and men who are returning to this country disabled because of the war in Iraq. We need to look at these issues. You can write position papers, or elevate an issue. It is up to you how you want to address these issues. You can also submit a personal paper. Stieger mentioned a related issue, the small font used in the publications and forms. A good portion of the population is getting older. They cannot read these things. There are a lot of people out there with limited mobility too.

TAP received a response regarding TAP 506-027, Forms and Publications Employee The issue was approved by the JC on October 10, 2006 and elevated February 8, 2007 to Sue Sottile. We recommended that IRS personnel should have professional backgrounds in writing skills and communicating to targeted education levels. In discussing the response, Area 5 decided to write a follow-up memo to the Sottile. Shah felt the IRS response was somewhat defensive. Wright stated the IRS response does not adequately address why some of these things could not be done. Coston said there is a writer-editor on the National Taxpayer Advocate staff. That person is responsible to review the Annual Report to Congress. So this function is already being utilized within the IRS whether they admit it or not. Bland asked why things could not be written in short concise sentences if it is being written for the taxpayer. Delzer shared that IRS works on keeping training material easily readable but when it comes to forms and publications, it is treated differently. Freeman said they could have people all over the country who could review these documents. Shah will chair the subcommittee to work on the response to the IRS; Bland, and Meyers will also be on the subcommittee. Subcommittee will meet and then will determine final response date.

**ACTION: Subcommittee to write response to IRS regarding Issue 506-027. Subcommittee members are Shah (Chair), Bland and Meyers.**

**ACTION: Delzer to email subcommittee copy of Issue 506-027 and the IRS response.**

**ACTION: If possible, Stieger to email DAT spreadsheet to Wright.**

## Current Issues

- **Toll Free Issues - Guthmann**

IRS is very defensive about this issue. Every meeting and contact we have had, there are complaints about this issue. Statistically the IRS gets hundreds of thousands of calls and a great deal of them are handled correctly, but we hear about the ones that aren't. He suggested that we suggest the first person a caller reaches handles the case until it is completed. They should have it from start to finish. Taxpayers are frustrated as they have to start over with every person they talk to. Marian stated that getting the taxpayer to the same person is not feasible because of the way the toll free system works. Bell asked if a system could be set up where information could be entered into a database when ever a taxpayer calls. Rousseau asked what are we looking at? How should a toll free system work? We need to look at the issue as what course are we going to take here? Should we address using the current system or suggest a new system. Wright said are we talking about ensuring accountability and continuity. Wong stated that when you call other toll free lines, you are given a time. Delzer said the IRS is looking at adding that feature. Delzer forwarded the parts of the TAB



report that were applicable to some committee members. Coston suggested that everyone look at the recommendations that were high on the TAB list. That would give you the ability to make a recommendation and can say in reference to the TAB recommendation to Congress.

**ACTION: TAC subcommittee to meet and set priorities and report at the July meeting. Subcommittee members are Guthmann (Chair), Meyers, Rousseau, and Wright.**

- **Taxpayer Assistance Centers (TAC) - Wong**

The subcommittee will be meeting with an analyst from Field Assistance on June 24 per the direction of Estelle Tunley, Director Filed Assistance. The TAC issue committee is only working on the TAC survey. This subcommittee is working on the issues received this filing season. This issue is being worked in conjunction with several committees. Meyers stated his concern that IRS is again planning to close some TAC offices. Freeman said that he cannot believe they are closing these offices but if the IRS wants us to pay our taxes, we should have someone to go to when we have questions or problems. They want our money but in return need to provide service. What about the people who have disabilities? And not everyone has the ability or access to computers. One way to get around the IRS position about cost is to bring up the American Disabilities Act (ADA).

Wright questioned why can't this subcommittee address specific issues as well as writing a position paper? Freeman concluded that TAP needs to complete a position paper as well as a recommendation. Should we have a separate subcommittee to create the position paper?

**ACTION: Freeman will coordinate the position paper subcommittee on TACs and will have draft prepared for August meeting.**

**ACTION: Delzer to send Freeman call-in information for TAC call May 24.**

**ACTION: Delzer to send Freeman previously compiled research on TACS, including previously elevated issues from Area 5 and NTA, ARC 2006, Volume II.**

- **Address for Payment - Stieger**

The issue concerns sending IRS payments to different offices, as there is no one central point. Third party is processing payments. We received a response and they are saying because of the cost and time involved they cannot centralize. If you send a payment to the wrong address, it will still get credited to your account as IRS has one centralized database. The IRS is justifying the cost. There really needs to be a centralized address and it should be easy to find. If you make estimated payments, you did receive preaddressed envelopes, but these are going to be discontinued after this year.

Wright stated that he believed there is a court case out there stating if you make a payment to the wrong service center, it may be considered late as they forward it to the correct one. Different types of returns go to different addresses. It can be very difficult and confusing to taxpayers as to where to send their payments. Bell said she spoke to a practitioner in regard to finding addresses of where to send correspondence, applications, and payments. There is a web site, but she did not check it out yet. [www.irs.gov/businesses/small/article/0,,id=117486,000.html](http://www.irs.gov/businesses/small/article/0,,id=117486,000.html)

**ACTION: Bell will send out a copy of the information she received.**

Guthmann feels this is not a practitioner problem as they know where to send them, but it is not as clear to taxpayers. It was different when publications and forms were mailed to taxpayers. Bland said this is also an issue for students who file in a different state than where they live. Stieger asked if Area 5 should pursue this issue? We need to do more research and then come up with a recommendation. We can tell them to change the system or we can recommend making the current one more user friendly. Delzer said the response already received does say that as paper filing continues to decrease, they will revisit this issue.

**ACTION: Address for Payment subcommittee to hold a conference call before June Area 5 meeting. Subcommittee members are Stieger (Chair), Bell and Freeman.**



- **POA, Check Box Authority - Guthmann**

Recommendation was sent to the JC and they discussed at the October meeting. Response was the JC sent the Area 5 recommendation back for rewriting. Meyers asked if the concern is that there is so much attention to identity theft. Maybe this is the real rationale behind this. The question is how long the Power of Attorney (POA) should last? < Guthmann stated that you need to have the authority to work on a return as long as the return is being worked.

The checkbox authority is 12 months and does not allow representation on that return. Should checkbox be indefinite or should it be expanded as a power of attorney, if I am a CPA or tax attorney, I should be able to negotiate. Wright – we have privacy act. Employees are regulated under the disclosure act. Checkbox should it act longer than 12 months? Should it act as a substitute as POA? POA has specific rights that can be granted or refused. The checkbox can give certain abilities. Need to be careful about limiting the POA authorities to the checkbox. Guthmann asked for the response to the Area 3 recommendation regarding Katrina. If that was accepted and made general beyond Hurricane Katrina, it would be a major improvement. The POA change would be very difficult.

**ACTION: Delzer to send to Guthmann and Wright copy of Area 3 recommendation and IRS response-- TAP 306-016 Third Party Authorization Expansion.**

### **New Issues**

- **New Issues**

# 4055 – drop-Ad Hoc Committee is currently working this issue  
# 4060 – combine with #3713  
# 4068 – drop  
# 4073 – drop  
# 4122 – Delzer said this is a valid issue. When the IRS rejects a return for an SSN/name mismatch, provide the four letter name control in the reject notice. Many clients have multiple last names and it requires multiple transmissions to determine which name is the last name used by the IRS—parking lot.

# 4132 – parking lot  
# 4136 – combine with #3713  
# 4138 – Rousseau -this is an issue with the military but don't see how TAP can work this - drop  
# 4139 – this is a taxpayer education issue – parking lot  
# 4140 – this is a taxpayer education issue – parking lot  
# 4142 – parking lot--could do a positive recommendation encouraging IRS's disability initiative

**ACTION: Delzer will research "Real Economic Impact Initiative" and report back to the full committee in July.**

# 4143 – drop  
# 4144 –this issue is already being worked and is a success story. The CRP issue is also being worked. Update status - Referred to Program Owner.  
# 4145 – drop  
# 4146 – drop  
# 4147 – drop  
# 4148 – drop-- VITA part is being worked by the VITA Committee  
# 4151 – Include with TAC issues  
# 4152 – Include with TAC issues  
# 4153 – drop  
# 4160 – drop  
# 4185 –parking lot

**ACTION: Delzer will do some research regarding use of rotary phone with the toll free line and report at July meeting.**



# 4189 – parking lot--second issue here is if a refund is issued and it goes to the wrong account, the taxpayer is out of luck. It will not be reissued. Delzer wondered how SSA handles this issue.

**ACTION: Guthmann will research on how SSA handles a refund deposited into the wrong account and report back to the full committee in July.**

Parking Lot

# 3842 – parking lot--in 2008 IRS will begin to offer individual account information on a secure site.

**ACTION: Delzer will research previous NTA ARC about the electronic deposit error problem.**

### **Communication Strategy**

Meyers and Bell will take back concerns regarding numerical priority assignments. Priorities need to be placed in context. Wong asked if resources required were considered. These are critical things. How often? When? Meyers said this is something the measures committee will be looking at. Freeman suggested using Low, Medium, High instead of using numbers.

Meyers asked if the strategies identified are the ones we should be using. Some of these actions are rather general and encompass a lot. We kind of tossed a wide net rather than be too narrow. Bell said they want to set goals but they want them to be realistic. Parts of this strategy needs to go back to the measures committee. This feedback will go back to the committee. Freeman suggested putting this in chronological order.

### **Subcommittee Breakouts**

Delzer has forwarded all the research she thinks each subcommittee needed. She now needs direction from them as to what information is still needed. Wright asked the subcommittees to discuss their issues (working lunch) and let Delzer know where they are going. Wright is concerned with the amount of time already spent on current issues and would like to look at new issues.

### **Office Report-Walker**

#### ***Volunteers to do phone interviews June 18-29, 2007:***

- Lee Stieger (some days)
- Chris Freeman
- Kay Bell
- Bob Meyers (not available in the last week in June)

#### ***Volunteers to attend Chicago Tax Forum:***

- Kay Bell
- Lee Stieger
- Chris Freeman

**Next meeting: June 12, 2007, 9:30 a.m. CT**



**Taxpayer Advocacy Panel (TAP)  
Area 5 Committee Meeting  
April 10, 2007**

**DFO:**

- Marian Adams, Local Taxpayer Advocate

**MEMBERS:**

- Kay Bell, Austin, TX
- Sandra Bland, Bemidji, MN
- Elizabeth Colvin, Austin, TX
- Chris Freeman, Pleasant Hill, IA
- Howard Guthmann, St. Paul, MN
- Bob Meyers, Omaha, NE
- Rick Rousseau, Harker Heights, TX
- Rajiv Shah, Columbia, MO
- Lee Stieger, Leavenworth, KS
- Kenneth Wright, Ashland, MO
- Warren Wong, Rochester, MN

**MEMBERS ABSENT:**

- Mary Suther, Dallas, TX

**STAFF:**

- Mary Ann Delzer, Program Analyst
- Steve Berkey, Acting TAP Manager

**Welcome/Roll Call/Review Agenda**

Ken Wright welcomed everyone to the meeting.

**Area 5 Chair Report--Wright**

- **Joint Committee (JC) Report**

At the meeting Coston reported that the budget for this year will be adequate for what TAP has planned. We are in the recruitment period and applications are coming in, with the on-line application system working well. At the time of his report, 350 draft applications and 190 final were received. Coston also shared information about the success of the Omaha and Phoenix Town Hall meetings. Attendance was good at both with 50-70 attendees. The Communication Committee reported on their work. Three referrals were discussed, but one was sent back to an area for further work. The JC is also discussing ways to improve the referral process. Meyers stated that he, Wright and Coston have been working on a proposal to streamline the referral process.

- **Agenda for Kansas City**



Topics are needed for the meeting agenda. This is a great opportunity to discuss topics at length that members are interested in.

Bell stated that the Communications Committee is working on improvements to TAPSpace to make it more workable and user friendly. A presentation that would encourage use of TAPSpace would be helpful. Berkey stated standardization is coming for some parts of the site, but an overview and question and answer period would be helpful.

**ACTION: Delzer to work with Bell and Berkey to determine the outline of what should be presented in regard to TAPSpace.**

Guthmann suggested Wright and Delzer prepare a tentative agenda and share it with the committee for feedback.

**ACTION: Wright and Delzer to prepare tentative agenda for the Kansas City meeting and share it with the entire committee for comment.**

Wong suggested Taxpayer Assistance Centers could be a topic.

Meyers stated that it is really important that Area 5 spend time looking at the parking lot and new contacts in order to form subcommittees. Berkey noted that the report is 13 pages long and suggested a subcommittee look at the issues ahead of time for ideas as to what the Area may want to take on. This way, Delzer can do research before hand.

Meyers suggested the committee members look at the contact report and prioritize what they are interested in working. Berkey further suggested a multi-vote via email, perhaps share the top three issues you would like to work.

**ACTION: Panel members to review the contact history report and email to Delzer/Wright the top three issues they would like to pursue.**

- **Omaha Town Hall-Meyers**

The meeting was very successful, with 70 people attending. Field Media specialist Christopher Miller did a great job lining up television, radio and print media exposure. People did not come due to lack of information. Meyers also sent written invitations to about 50 people. People who were not able to attend have said they appreciated the idea of TAP and the mission.

One success can already be shared from the meeting. Taxpayer shared the difficulty in claiming business use of home on the Schedule F. Olson contacted the Chief of Forms and Publications and requested the Schedule F mirror the Schedule C on this issue. They have already agreed to make the change for the 2007 forms. This is an immediate success we shared with the media.

Meyers also thanked Berkey, McQuin, Coston, Robb and Toy for the great job they did with the town hall. Freeman and Wright did a nice job with their presentations and Stieger with the focus group. Berkey thanks Delzer for making the contacts with Miller, stakeholder groups and with UNO in setting up the meeting logistics.

## **Issue Discussion**

- **Toll Free Issues - Guthmann**

These are all problems with poor customer relations. IRS program managers are defensive when you talk with them. Guthmann said he would rather talk with local people here who recognize the problems. We need to come up with solution.



Adams stated that TAP is more successful when they look at the small pieces to find solutions. Guthmann agreed to have something written up for consideration at the Kansas City meeting.

Berkey reminded the committee that the Taxpayer Assistance Blueprint Phase II report is due next week. This report should have good information for TAP as to where IRS is heading with customer service.

- **Taxpayer Assistance Center (TAC) - Wong**

The problem continues to be both a macro and micro problem. Committee has decided has decided to look at the micro problems as the way to go. Delzer has shared the Treasury Inspector General for Tax Administration (TIGTA) reports regarding walk-in service. One report deals with the problem that TAC phone numbers are not in all the telephone books as the law prescribes. The law says IRS must do it, but the IRS is breaking the law. How do we fix it?

**ACTION: Delzer to send TIGTA web link and report numbers to members who wish to look at TAC related reports.**

- **Address for Payment – Stieger**

IRS uses numerous addresses for payments in order to handle their work load. This is a customer service issue as customers sort the mail, as opposed to IRS distributing the mail. The various addresses spread the workload to the different centers. IRS says it would cost more to do handle the mail differently. Is this an uphill issue to get it changed?

Guthmann shared that the states are working toward making taxpayers separate their checks from their documents. Recently worked with an IRS person on a case and he did not know who to send the check to either.

It is very confusing to taxpayers as checks and returns go to different addresses depending on where you reside. The addressees vary from time to time as IRS adjusts the work load.

Colvin shared that different extensions for zip codes, at the same addresses are also used, depending on whether money is being sent with the return.

Guthmann said a taxpayer could have five different addresses to know depending on the situation and what kinds of payments are being made.

Stieger said for Kansas, returns generally go to Austin, but some people still send their returns to the Kansas City Campus. IRS has said if taxpayers send payments to the wrong place they will be processed anyway.

Wong stated that someone asking about where to make a payment will not get a consistent answer.

Wright observed that since IRS re-organized, this has become a bigger issue, a systemic issue that the cure may only be to "un" re-organize.

Berkey reminded the committee that if this is of concern to taxpayers, TAP can send it forward if you feel strongly about it.



Guthmann said the solution may be as simple as sending taxpayers a pre-addressed envelope, or having the TAC offices “stock” self addressed envelopes. Delzer said taxpayers who file on paper get an envelope with their packages and those who make estimated payments get vouchers and envelopes as well. The calls TAP gets about where to send payments generally come from people who filed electronically, or with a practitioner, and now don’t know where to mail the money. Bland said the TAC employees would still need to know what envelope to give people. Freeman said the problem is there are so few TAC centers to go to and there are too many types of returns to consider.

- **POA, Check Box Authority - Guthmann**

Meyers shared that there will be a free IRS phone forum on Thursday, May 10.

**ACTION: Delzer to send all members the information on how to register and attend the IRS phone forum on Powers of Attorneys.**

**Outreach**

Wright shared that Rivera has resigned from the TAP and another person will need to be recruited for Texas. The number of outreaches continues to be good, but it would be great to increase the number of people who are doing the outreaches.

Shah mentioned that he had completed several and had not reported them. Something all need to improve. In March he attended the congressional liaison meeting. It was really nice to meet congressional staffers and other IRS staff. Overall good interactive sessions and was able to share about TAP.

**Issue Committee Highlights**

Bell--on the Internal Communications Committee and are working on TAPSpace to make it more user friendly. By summer time, hope to have the new look.

Bland/Rousseau/Colvin—VITA members are all engaged in tax season. Have done some planning for what we want to do in the months to come. Are looking at evaluation of training materials and branding the program with the public. Hope these will be done for the meeting with Commissioner.

Freeman/Wright--Ad Hoc has a forms project and is working with the multi-lingual initiatives.

Shah/Guthmann--Burden Reduction is not making much progress and need to be pushed along. IRS still has not decided on the key issues for this year. Very disappointing to date.

Stieger—Notices just had their face to face meeting and the new members had Document Assessment Tool (DAT) training, so they begin to score notices. IRS is considering having TAP become involved in something new, Forms Assessment Tool (FAT). Also looking at document and web site issues for the visually handicapped.

**Office Report--Berkey**

Recruitment is going well with final applications for Nebraska, three; Oklahoma, six; Texas, 16. Just a reminder that Milwaukee staff is stretched thin and please adjust your expectations with that in mind. McQuin will be Acting Low Income Tax Clinic Director for another three or four months. Kayla Walker, a TAS analyst from Little Rock is participating in the IRS management development program and TAP will be a learning experience for her

**Public Input--None**





**Closing/Assessment**

Stieger stated that many issues are up in the air and need discussion at the face to face meeting in Kansas City. Since time is short, please do the written assessment and send via email.

Meeting adjourned

**Next meeting May 6-8, 2007 in Kansas City**



**Taxpayer Advocacy Panel (TAP)  
Area 5 Committee Meeting  
March 13, 2007**

**DFO:**

- Marian Adams, Local Taxpayer Advocate

**MEMBERS:**

- Kay Bell, Austin, TX
- Sandra Bland, Bemidji, MN
- Elizabeth Colvin, Austin, TX
- Chris Freeman, Pleasant Hill, IA
- Howard Guthmann, St. Paul, MN
- Bob Meyers, Omaha, NE
- Rajiv Shah, Columbia, MO
- Lee Stieger, Leavenworth, KS
- Kenneth Wright, Ashland, MO
- Warren Wong, Rochester, MN
- Ken Wright, Columbia, MO

**MEMBERS ABSENT:**

- Ralph Rivera, Garland, TX
- Rick Rousseau, Harker Heights, TX
- Mary Suther, Dallas, TX

**STAFF:**

- Mary Ann Delzer, Program Analyst
- Steve Berkey, acting TAP Manager
- Patti Robb, Secretary, Milwaukee, WI

**Welcome/Roll Call/Review Agenda**

Ken Wright welcomed everyone.

**Meet the New Program Manager**

Steve Berkey will be the acting TAP Manager during the month of March while Sandy McQuin is acting Director for the Low Income Tax Clinic Program (LITC). He is looking forward to working with Area 5. Please feel free to give him a call. Berkey complimented the Area 5 members for their hard work. He was particularly impressed with the outreach report. This committee really seems to have everything together. One thing he wanted to touch base on was delayed travel vouchers. This may not apply to every member, but some members have delayed getting their travel expenses turned in or returning the signed voucher. Secretaries have to do a pre authorization before travel and that authorization is only valid for a short time. If voucher is not done timely, the authorization has to be sent through channels for approval all over again. This is a burden on the secretaries as well as the approvers and further delays reimbursement.

**ACTION: Delzer to post Berkey's contact information on TAPSpace.**



## **Area 5 Chair Report--Wright**

- **Joint Committee (JC) Report**

Wright said Coston announced that the budget has been approved for this fiscal year.

Area 1 held the first Town Hall (in Brooklyn) this year and had 35 to 40 people in attendance.

The JC held a discussion for a new email process to get answers to questions regarding elevated issues. It was determined that they could only post answers to questions; decisions cannot be made via email.

TAPSpace enhancements should be done within a month or so. Please update your bios if you have not done so already.

Robert Meyers said the Communications Committee put together a strategy – internal, external and measurements. Trying to develop tools to help establish a protocol to get TAP work done. We will try to add some quantitative goals.

The new TAP application is being tested online right now. The test will run until noon today. Berkey said he has gotten some feedback already. A feature was added to save and continue the application as applicants progress thru to completion so as not to lose information. A new feature was added to get your password emailed if you forget it. Coston will be sending out a message with recruitment products for you to help us identify good candidates. Recruitment runs March 19 thru April 30.

TAP Annual Meeting will be Dec 10 – 14, 2007 in Washington, DC at the Fairmont Hotel in Georgetown.

## **Issue Discussion**

- **Toll Free Issues - Guthmann**

Nothing new.

- **Taxpayer Assistance Center (TAC) - Wong**

Had a committee meeting on March 8, with members from Areas 2 and 3. Decision was made to write several recommendations and deal with problems on the micro level. Issues to be elevated will include lack of staffing, long wait times to make a payment, and forms availability. They broke into three teams to prepare draft recommendation by April 12. Area 5 should be able to consider the three draft recommendations by the May meeting.

- **Address for Payment - Stieger**

No report this month. Research was just sent to this subcommittee and they will need to discuss on a conference call.

- **POA, Check Box Authority - Guthmann**



Still do not have minutes of the October JC minutes. Delzer reminded the subcommittee that there is a new joint committee and we need to move forward with what Area 5 feels is a good recommendation. Guthmann stated they may want to break this issue into smaller pieces because we will have a better chance of getting IRS to consider our recommendation.

### **Outreach Commitment**

Wright participated in the TAC survey last month in downtown St. Louis. People generally seemed to have a good impression of the IRS. Guthmann asked how was the office advertised in St. Louis? Wright asked several people and in spite of fact that it is downtown, not many complaints about location and availability. Everyone seems very happy to have a TAC in St. Louis. Not sure when the survey results will be coming out. Wong asked if TAC offices were ever “shopped”? Delzer explained that the Treasury Inspector General for Taxpayer Administration (TIGTA) does do shopping visits every year. They do a sampling and submit a report on their findings regarding accuracy, experience, wait time, etc.

**ACTION: Delzer will send Wong a copy of the last year’s TIGTA report for TAC.**

### **Action Items**

Freeman to pursue attendance of TAP at the Iowa State Fair – still working on.

Power of attorney subcommittee to look at rewriting the Third Party Designee issue

Meyers was preparing for a conference in March and got a question about the power of attorney and that may fall into this category. Will try to find out more information. Will send a copy to Guthmann.

### **Issue Committee Highlights**

Ad Hoc-Wright reported a meeting was scheduled for this week.

VITA - Bland explained difference between the VITA and TCE programs.

Communication – Bell reported she participated in the online application testing. Still working on surveys for returning members, as well as new members, and they are progressing positively.

Burden Reduction – Shah stated they are scheduled to meet to discuss assigned tasks. Guthmann said he was disappointed with the support from IRS as they are still looking for prioritization of issues. Still not sure what TAP will work on this year.

Wright shared the TAP vision statement, “**Citizen volunteers valued for improving IRS services.**” Burden Reduction committee certainly has a concern. Coston is hoping to arrange a panel meeting with the Commissioner. Looking for issues to bring before the commissioner and maybe this is one of those. Burden reduction works on issues referred by the IRS. If they don’t tell us what to work on, we don’t work. Berkey told Guthmann that Ramirez should be contacting the program owner about this problem.

Notices--Stieger reported they are having a face-to-face meeting this week. Will be hitting the ground running at this meeting.

### **Office Report--Berkey**

Town Hall meeting will be in Omaha next week, Thursday, March 22 at the University of Nebraska, Omaha, Thompson Alumni Center, 6705 Dodge Street. Delzer has been extremely busy working with media and other partners trying to get publicity for this event and is to be commended for her hard work..



Meyers reported that he sent out letters to about 50 individuals to encourage them to come. Christopher Miller, Field Media Specialist, has been in contact with local radio stations and an interview is set for 3/21 on KFAB. We hope to have television coverage from the local cable company for the local access channel. Miller is trying to set up additional interviews. Nice small article in yesterday's paper however mentioned TAS, not TAP at all. We believe the Omaha World Herald will be at the event and do a re-event article. It is the state newspaper in Nebraska.

Delzer reported that she has gotten fabulous support from our IRS partners. They have assisted in getting the word out to many community based organizations. We have five confirmed attendees; two enrolled agents, a congressional staffer, our former Citizen Advocacy Panel chair for Midwest, and an LITC coordinator.

Berkey encouraged Area 5 to do more outreach, as this is the best time of year for people to have taxes on their minds. Also reported that the TAP Annual Report will be out within a month or so. Berkey reminded the members that Area 5 has one more conference call before the face to face meeting. You can accomplish much more during the face-to-face if you start thinking now about things to work on during the meeting.

#### **Public Input**

None.

#### **Closing/Assessment**

Meyers – looks like some committees still need some assistance to get moving. Do we want to do the written assessment or verbal assessment?

Bell – good meeting, everyone stayed on point. Appreciate feedback from other issue committees.

Bland – agrees with Bell.

Colvin – agrees

Freeman – appreciates staying on time and the sharing of issue

Meyers – meeting went well and complimented Wright's leadership

Stieger – moved well

Wong – good reporting

Wright – sounds like our committee is doing well. Looking forward to touring the Kansas City Campus. Please review your outreach commitment and get your reports sent to Delzer. Also, if you cannot attend the meeting, please be sure to let us know so we can ensure we have quorum.

Meeting adjourned

**Next meeting April 10, 2007, 9:30 a.m.**



**Taxpayer Advocacy Panel (TAP)  
Area 5 Committee Meeting  
February 13, 2007**

**DFO:**

- Mary Ann Delzer, Program Analyst, Milwaukee, WI

**MEMBERS:**

- Kay Bell, Austin, TX
- Sandra Bland, Bemidji, MN
- Elizabeth Colvin, Austin, TX
- Howard Guthmann, St. Paul, MN
- Bob Meyers, Omaha, NE
- Rick Rousseau, Harker Heights, TX
- Rajiv Shah, Columbia, MO
- Lee Stieger, Leavenworth, KS
- Mary Suther, Dallas, TX
- Kenneth Wright, Ashland, MO
- Warren Wong, Rochester, MN

**MEMBERS ABSENT:**

- Chris Freeman, Pleasant Hill, IA
- Ralph Rivera, Garland, TX

**STAFF:**

- Patti Robb, Secretary, Milwaukee, WI

**Welcome/Roll Call/Review Agenda**

Ken Wright welcomed everyone.

**Area 5 Chair Report**

- **JC Report – Bob Meyers**

Many success stories were shared and good outreaches discussed. Five recommendations were approved; four from Area 1 and one from Area 6.

TAP and the National Taxpayer Advocate will host three town hall meetings:

March 6 in Brooklyn

March 22 in Omaha

March 29 in Phoenix

Further discussion will be held about the Omaha town hall meeting. Since we are operating under a continuing resolution, we can only fund about three people to attend the town hall.



The TAP Annual meeting for 2007 will be the week of December 10 at Fairmont hotel in Georgetown.

### **Issue Discussion**

- **Toll Free Issues - Guthmann**

Guthmann stated he has been on vacation and unable to complete a report.

- **Taxpayer Assistance Center (TAC) - Wong**

The combined Area 2, 3, and 5 committee is working on various TAC issues and still in the research process. Draft proposals are currently being worked on. Theses will be discussed by the combined subcommittees when completed. The National Taxpayer Advocate did a study and has a report in Volume II of her Annual Report to Congress regarding how taxpayers prefer to interact with the IRS.

- **Address for Payment - Stieger**

Delzer did some investigating as to why the IRS uses lockboxes for payments. She is still researching the issue.

- **POA, Check Box Authority - Guthmann**

Guthmann stated he still had not received the minutes for the October Joint Committee meeting. Robb stated they were in the process of being completed.

### **Outreach**

At least five members did outreach in January. There are close to 15 reported to date. Our database has been down for a day or so have been unable to update what has been reported in the last few days.

Success stories:

Meyers said there have been several comprehensive stories locally about EITC day. Coston sent out an email to notify panel members several days before this event occurred. There has also been a good response and publicity about the new panel members starting their terms.

Wright shared he was interviewed about the telephone excise tax and also put in a plug for TAP.

Colvin met with Mike McDermott the new LTA in Austin. They are extremely busy right now and she got the feeling this has reduced the amount of outreach they can do right now. Delzer noted there are a lot of vacancies in the TAS organization, however since we are operating under a continuing resolution, TAS cannot hire. There is also little money for travel which effects outreach.

Wright encouraged everyone to get out to talk to local groups, since it is in the filing season. Try to get people interested since they are focusing on taxes right now and should be bringing systemic issues to us.

Bell is finding more opportunities to talk about TAP, since it is tax season.

### **ACTION Items**

Two items remain open:



**Freeman to pursue attendance of TAP at the Iowa state fair.  
Power of Attorney subcommittee to look at re-writing the Third Party Designee issue.**

**Issue Committee Highlights**

Bell – Communication – Had a call last week. Are doing surveys of new and returning members for feedback on the annual meeting.

Guthmann—Burden Reduction—will be meeting on February 16.

Rousseau – VITA – Starting to work in subcommittees right now. Explained the scope of the VITA committee in relation to AARP Tax Aide. IRS has a contract with AARP and gives them a grant of \$6 million. VITA is not a grant program. Volunteer Return Preparation Program (VRPP) incorporates both VITA and AARP Tax Aide. One of the issues the VITA committee is addressing is branding “VITA” in IRS products.

Shah – Burden Reduction – working on Form 2678 to improve clarity of the form and instructions. Have a call this week.

Suther – Notices – met last week and were asked to score some more notices. They haven’t been identified yet. Still need to train the new members on the scoring process at the face to face meeting in March.

Wright – Ad Hoc – Looking at three forms and publications.

**Office Report--Delzer**

Sandy will be on a detail as Director of Low Income Tax Clinic March through June.

Recruitment beings 3/19 to 4/30. Flyers have been prepared if you want some. We need a panel member from Oklahoma.

Area 5 Face-to-face meeting is in KC May 6-7. We will travel in on Sunday, meet Sunday evening and all day Monday. Tuesday will visit the Kansas City Campus. Depending on flights, may be able to do subcommittee work Tuesday before heading home. Hotel will be the Westin Crowne Center. It is about one block from the campus so we can walk. Stieger said he will drive in and go home each evening.

TAP town hall is March 22 in Omaha. Meyers is identifying a venue and Delzer is working on the rest of the details. Delzer will send out marketing materials as soon as things are completed and approved.

**Public Input**

None.

**Closing**

Stieger received an invitation for the be congressional liaison meeting in Kansas City on March 15. He will forward notice to Delzer. Stieger is unable to attend and was hoping someone else would be able to.

**Meeting Satisfaction Assessment** – meeting went well and was pretty fast paced. Highlights shared of Issue Committees was interesting. We followed our ground rules and stayed on top of things. Please make sure you complete the written meeting satisfaction survey and return it to Delzer.

Suther shared that National Taxpayer Advocate was on CSPAN the other day testifying at Ways and Means. Also had some problems with IRS as the chairperson for a very small charity. Macy’s wanted to give us some money but we don’t have an EIN. I called the IRS and was bounced all over before I finally reached the correct area. They were very helpful once I got to them.





Meeting adjourned

Next meeting March 13, 2007

**Area 5 Committee Meeting  
January 9, 2007**

**DFO:**

- Marian Adams, LTA, Wichita, KS

**MEMBERS:**

- Sandra Bland, Bemidji, MN
- Elizabeth Colvin, Austin, TX
- Chris Freeman, Pleasant Hill, IA
- Howard Guthmann, St. Paul, MN
- Bob Meyers, Omaha, NE
- Rick Rousseau, Harker Heights, TX
- Rajiv Shah, Columbia, MO
- Lee Stieger, Leavenworth, KS
- Kenneth Wright, Ashland, MO
- Warren Wong, Rochester, MN

**MEMBERS ABSENT:**

- Kay Bell, Austin, TX
- Ralph Rivera, Garland, TX
- Mary Suther, Dallas, TX

**STAFF:**

- Bernie Coston, TAP Director
- Sandy McQuin, Manager, Milwaukee, WI
- Mary Ann Delzer, Program Analyst, Milwaukee, WI

**Welcome / Review Agenda / Introductions**

Ken Wright welcomed everyone and reviewed the agenda.

**Area 5 Chair Report**

- **Joint Committee Report-out**

A short Joint Committee meeting was held in D.C. to make some administrative decisions and set the calendar. Training will be in Dallas this week for all the chairs to learn their duties.

As for Area 5, we would appreciate everyone letting the staff know ahead of time if you are unable to attend conference calls. This will allow for the adjustment of the agenda if necessary.

- **Area 5 Self-Assessment**



Thanks to Elizabeth Colvin and Howard Guthmann for preparing the draft report. First half of the report is used to prepare the TAP Annual Report that goes to Treasury, the National Taxpayer Advocate, and the Commissioner. What is included here really justifies TAP's existence, so we need to further flesh out the report and make sure we have input from everybody. Area 5 has many good ideas and we need to make Area 5 look good.

It is very important that everyone respond when we ask for input. Would like everyone to respond to all emails so staff knows the message has been received and all have had an opportunity to contribute. Looking to adopt this policy for Area 5 so that we know everyone received the information.

**ACTION: Delzer to complete the draft Area 5 Self-assessment by January 12, 2007 and email to all panel members for comment.**

**ACTION: Panel members to give comment on draft Area 5 Self-assessment by January 17, 2006. Affirmative responses are required.**

Wong questioned the best way to handle negative comments.

McQuin reminded the committee that the self-assessment is made up of two parts. The first part is the information that feeds into the TAP Annual Report. The second part, or the committee assessment, gives members comments about leadership, staff, IRS cooperation, etc. Those items don't go to the annual report, but are items Area 5 needs to consider. How can we make TAP better.

Wright acknowledged that there are two pages of concerns listed. As a new chair, it is too soon to know how we can cure these problems, but please call or email to be heard.

### **Issue Discussion**

#### **Toll Free Issues – Guthmann**

In light of having new subcommittee members, Delzer sent an email requesting a conference call be held to focus on the toll free issues.

**ACTION: Guthmann to schedule a conference call to decide direction of the subcommittee and determine necessary research.**

#### **Taxpayer Assistance Centers –Wong**

A meeting will be held January 11, with members from Area 2 and 3. Delzer commented that this committee will be looking at all the TAC issues and perhaps divide into yet more subcommittees.

#### **Address for Payments – Stieger**

Quarterly payments are sent to different address depending on where the taxpayer lives. We need to decide the scope of what we want to look at.

**ACTION: Delzer to send email reminding subcommittee members of conference call January 17, at 9:30 a.m.**

#### **POA, Check Box Authority – Guthmann**

Concern expressed about lack of guidance received from the Joint Committee about the direction to follow with the rewrite of the issue. Wright shared that he received the background information and will assist with the issue re-write. Looking forward to discussing and deciding how to move forward

#### **Outreach Commitment**

McQuin reminded the committee that making a commitment to outreach was discussed at the annual



meeting. How should we approach goals, individual or area wide?

We have been very successful with the press releases prepared for the new folks. Feel free to use the copy received and share with media or other organizations that you may know.

Marketing materials, as described in the outreach kit, are available. Please contact staff if you have outreach opportunities, and we will send you what you need. Business cards ordered as well that you can use

Guthmann stated that Area 5 seems shy of issues. Outreach is the principal way to get issues. At our Burden Reduction meeting we received a wonderful list of issues affecting small business.

**ACTION: Delzer to inquire about survey given to Taxpayer Burden Reduction committee to see if it can be shared with Area 5.**

McQuin reminded all to be sure to report outreach as we really need a record. As you do outreach, be sure to keep issues discussed in mind and share them with the committee. Outreach is a great way to find out the peoples' concerns. If you want reimbursement, be sure to let the office know in advance.

Meyers proposed a goal of two outreaches per month, per member. With thirteen members, that would be over 300 contacts for the Area 5 committee this year. If you think about it, that would be ten times more than were reported last year. Don't forget to count, and report your one on one conversations as Outreach contacts.

**ACTION: Delzer to list on monthly meeting agenda a tally of outreaches done per month, as well as year to date.**

Freeman asked about when the business cards would arrive.

**ACTION: Delzer to inquire status of business card order.**

Bland asked about attending the Home and Boat Show in Bemidji. Is this the type of event we should pursue?

**ACTION: Bland to share information about the Home and Boat Show. Delzer to contact show coordinators to inquire about TAP attendance.**

**ACTION: Freeman to pursue attendance of TAP at the Iowa state fair**

#### **Office Report-McQuin**

We have contacted the Campus Taxpayer Advocate in Kansas City to inquire about receiving a tour during the dates we picked for our face to face meeting, May 6-8, 2007. She will coordinate with the facility for us.

If you experience problems with the use of TAPSpace, please call the office and not the vendor.

All information for our meetings is available on the calendar and in the Area 5 folder. Coston stated the contractor is behind and requested members to be patience work to be completed

#### **Public Input**

None



**Closing / Assessment-Stieger**

Meeting was slow in getting started, but input was heard from many people. Good basis to start the new year.

Coston shared that the National Taxpayer Advocate Report to Congress has been released. Each panel member will receive a copy of the report on CD, but it can be viewed on [irs.gov](http://irs.gov).

The top five most serious problems encountered by taxpayers are, Alternative Minimum Tax, Tax Gap, Transparency of the IRS, True Costs and Benefits of Private Debt Collection, Early Intervention in IRS Collection Cases.

Wright thanked the members for attending the call and asked that everyone respond to emails sent this next month so we know everyone has had an opportunity to give input.

**Next meeting: Tuesday, February 13, 2007, 9:30 am Central Time**