



## 2010 Meeting Minutes Area 6

- December 8, 2010
- November 3, 2010
- October 6, 2010
- September 1, 2010
- August 11, 2010
- July 7, 2010
- June 1, 2010
- May 6, 2010
- April 6, 2010
- March 2, 2010
- February 2, 2010

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**Taxpayer Advocacy Panel  
Area 6 Committee  
Meeting Minutes  
F2F December 8, 2010**

**Designated Federal Official**

Teresa Thompson

**Attendance**

Kirsten Ball  
Harlan Barnett  
Herb Bohrer  
Toni Smith  
Nancy Eik  
Beverly Phillips  
Richard Holland  
Edith Kendall  
Colleen Hitchcock  
Bradford Lee  
Anne Rasmussen  
Karla Toomer  
Cindi Williams

**Staff**

Judi Nicholas, TAP Program Manager  
Nina Pang, TAP Analyst  
Timothy Shepard, TAP Analyst  
Kymberly Hand, TAP Secretary  
Janice Spinks, TAP Analyst (in part)

**Opening/Welcome/Announcements**

Teresa Thompson opened the meeting. Herb welcomed the members.



### **Introductions**

Everyone introduced themselves and told a little bit about themselves.

### **Approval of November Meeting Minutes**

Judi explained how the meeting minutes are posted, Kymberly brought an error to everyone's attention and it was corrected.

The meeting minutes were approved. .

### **Area 6 Ground Rules**

Herb reviewed the Area 6 ground rules.

### **Staff Support**

Judi reviewed the Seattle support. Tim Shepard is the Area 6 analyst, provide research, agendas, and will be the Area's first contact. Nina supports both analysts. Kymberly does the travel arrangements, processes travel vouchers, and sends out the outreach forms and inputs outreach.

Judi reminded everyone that staff is there to assist the panel members. Please contact staff if you have questions.

### **Establish Meeting Quorum**

The committee decided that the Area 6 quorum will be 50% plus one, which is 7 at the moment.

### **Outreach Expectations**

Judi mentioned that all new members, returning members who requested more business cards and the transferred members from Area 5 were all ordered business cards. They are expected soon.

Judi discussed outreach reporting requirements. Towards the end of the month, Kymberly sends an email requesting the month's outreach. This generates a report for the Area. If there are outreach expenses, they must be approved by Judi prior to the event. If you need outreach give-aways, please send an email to Kymberly.

Harlan reviewed his outreach approach. He provided the area members with his give-aways and explained how he goes about conducting outreach.

Herb discussed the outreach report. He reminded everyone that outreach was part of the job. Kymberly will send out a report at the end of the month. Please fill it out and send it back to Kymberly.

### **2010 in Review**

Herb mentioned that everyone should have heard the Chair report yesterday at the plenary. Area 6 had six issues which were forwarded to the Joint Committee, and closed 67 issues during that same time.

### **Chair and Vice-chair Election**

Judi described the process that Area 6 has used in the past. Karla mentioned that in other areas, if there are three people running, they have a run-off to get to the top two. Then they have another vote to obtain the top one.

Harlan nominated Anne Rasmussen as Area 6 Chair. Anne accepted and she was the only person nominated.

Anne Rasmussen was selected as Area 6 Chair.

Karla nominated Rick Holland as Area 6 Vice-chair. Rick accepted.

Harlan nominated Bev Phillips, Bev declined. Rick was selected as Area 6 Vice-chair.



**Subcommittee Reorganization**

IRS Services – new members are Edith Kendal & Colleen Hitchcock

Taxpayer Burden – new members are Cindi Williams

Miscellaneous – new members are Brad, Anne and Toni

**Subcommittee Instructions includes Closing Letters**

Tim mentioned that the Area sends out closing letters. Tim would like to have some of the members help in writing the closing letters. The letter has the opening and the closing paragraphs, but needs a middle paragraph

**Quality Review for the Area**

Harlan mentioned that the Quality Review process should continue. Herb explained the Area 6 process to Anne. They will ask someone to quality review the referral, same as before.

**Report out**

See notes from Judi Nicholas for IRS Services, Bev Phillips (lead) (Meeting time is – 2<sup>nd</sup> Wednesday 11 a.m. Pacific Time

The subcommittee would like to query TAP on the toll-free phone issues. They would like to submit a paper to the IRS.

See notes from Tim Shepard for Miscellaneous, Nancy Eik (lead)(Meeting time is 3<sup>rd</sup> Wednesday 11:00 a.m. Pacific Time (same)

See notes from Nina Pang & Kymberly Hand for Taxpayer Burden, Cindi Williams (lead) –Meeting time is same date as last year, 3<sup>rd</sup> Tuesday 1:00 p.m. Pacific Time

**Open Forum**

Judi will coordinate the new panel members with their Local Taxpayer Advocate (LTA). Money Smart Week is coming up in January. Stakeholder Partnership Liaison (SPEC)

**Action Item:** TAP staff will need to obtain the Outreach plan.

**Setting 2010 Conference Call & F2F Meeting Schedule**

First Wednesday, 11 a.m. Pacific Time starting in February.

Action Item: Tim will send out an Outlook Reminder for the meetings. One for January & February/the rest of the calls.

Locations for the F2F, Seattle (where the staff is located), Salt Lake City, Twin Cities & Omaha. TAP staff will prepare a cost comparison. The committee preferred two full days.

The F2F would be in June.

April 25 – 27  
June 13 14 15  
June 10 – 11

TAP staff will find six dates to send out to the Area.



**Area 6's conference call will be**

The January call will be January 5<sup>th</sup> 1:00 Pacific Time.

**Travel Scenarios**

**End of Day Announcements**

**Meeting Assessment**

**Closing-Designated Federal Official-Teresa Thompson**

Teresa Thompson closed the meeting



**Taxpayer Advocacy Panel  
Area 6 Committee  
Meeting Minutes  
November 3, 2010**

**Designated Federal Official**

Teresa Thompson, DFO

**Attendance**

Kirsten Ball  
Harlan (Doc) Barnett  
Eileen Birge  
Herb Bohrer  
Dean Conder  
Nancy Eik  
Joan Gustafson  
Richard (Rick) Holland  
Charnia Parrish  
Beverly Phillips  
Karla Toomer

**Staff**

Judi Nicholas, TAP Manager  
Tim Shepard, TAP Analyst  
Nina Pang, TAP Analyst  
Kymberly Axtell, TAP Secretary  
Steve Berkey, TAP Senior Analyst

**Guest**

Cindi Williams  
Rich Bilancia

**Absent:**

Richard (Rick) Holland

**Opening/Welcome/Announcements**

Teresa opened the meeting. Kymberly completed roll call and quorum was met. Herb Bohrer welcomed everyone.

Steve Berkey joined the call at the request of the TAP Direction to acknowledge and thank Eileen and Dean for their many contributions to TAP over the last three years. In addition to the many hours, they devoted as TAP members, both have served in leadership roles as well.

Everyone said their goodbyes and well wishes to the third year retiring members, Eileen Birge and Dean Conder and to the members affected by the TAP realignment, Joan Gustafson and Charnia Parrish, who will be moving to Area 5.

Judi mentioned that Area 6 would have four new members from Area 5 from the states of Iowa, Nebraska and Minnesota.

Herb welcomed two prospective TAP members, Cindi Williams and Richard Bilancia.

**Approval of October Meeting Minutes**

Minutes were approved as written.



### **Outreach Corner**

None

### **Citizen Input**

None

### **IRS Services Subcommittee Report—Harlan Barnett**

Harlan reported on the following issues:

**Issue #17444—Rollover Gain**—Harlan reported that the subcommittee placed this issue into the parking lot to monitor IRS action and implementation.

**Issue #17660—Accessing own account info on website**—Harlan provided a brief background and stated that the subcommittee recommends the issue be closed because the response from IRS was received.

**Decision**—the full committee, by consensus, approved the closure of this issue.

**Issue #18762—Make payments match business quarterly payments**—Harlan provided a brief background and stated that the subcommittee recommends this the issue be closed because it will require a change in legislation.

**Decision**—the full committee, by consensus, approved the closure of this issue.

### **Taxpayer Burden Subcommittee Report—Kirsten Ball**

Kirsten reported on the following issues:

**Issue #16844—Offer in Compromise-More info needed**—Kirsten reported that the subcommittee continues to work this issue. They will review the latest research and make a decision on their next call.

**Issue #18121—Qualified Dividends & Capital Gain—problems with instructions**—Kirsten reported that the subcommittee is currently writing a Joint Committee issue referral form for this issue.

**Issue #18751—IRS Representatives Need to Speak English well**—Kirsten reported that the subcommittee will be renaming the issue and rewriting the issue statement to more closely align with the issue.

**Issue #18800—Circular 230-Change for the better—combine with Issue #17282**—Kirsten reported that the subcommittee is waiting on research regarding the legal issues and will discuss it at the next subcommittee meeting.

**Issue #18750 Exam Representative-can't Speak English well enough to be understood**—Kirsten provided a brief background and the subcommittee recommends the issue be dropped because it being similar to Issue #18751.

**Decision**—the full committee, by consensus, dropped the issue because it is not a systemic problem.

**Issue #17323—POA-Representative Info takes too long to load on accounts**—Kirsten provided a brief background and the subcommittee recommends dropping the issue because the IRS had hired more people which has reduced the backlog. **Decision**—the full committee, by consensus, dropped the issue because it has been resolved by the IRS.

**Issue #17522—Offer in Compromise-Change for the better**—Kirsten provided a brief background and the subcommittee recommends dropping the issue because it has been addressed by Area 6 Issue #17282.

**Decision**—the full committee, by consensus, dropped the issue because it was addressed by Area 6 Issue #17282.



### **Miscellaneous Subcommittee Report—Nancy Eik**

Nancy reported on the following issues:

**Issue #17338—Form 9465-Electronic Funds Withdraw**—Nancy reported the subcommittee would discuss this issue at their next meeting.

**Issue #17523—Joint Venture-should be able to file one schedule C**—Nancy provided a brief background and subcommittee recommends this issue be dropped because it requires a legislative change.

**Decision**—the full committee, by consensus, dropped the issue because it requires a legislative change.

**Issue #18788—Have TAS Help Taxpayers with ITINS**—Nancy provided a brief background and subcommittee recommends this issue drop because it appears to be an isolated incident.

**Decision**—the full committee, by consensus dropped the issue because it is not a systemic problem.

Issue #17299, was discussed at the October Joint Committee meeting and questions arose that the committee chair could not answer. Herb requested that Nancy be on the November Joint Committee call to answer questions by the Joint Committee members.

### **TAP Parking Lot Issues—Tim Shepard**

Tim stated that he and the leads of the subcommittees have reviewed the parking lot issues and the issues will be discussed at the next subcommittee meeting. The goal is to identify additional issues that will be worked at the annual meeting.

### **Annual Meeting—Herb Bohrer**

Herb mentioned that the annual meeting plans are progressing and to watch for emails from Kymberly Hand regarding the annual meeting travel and hotel arrangements.

Kymberly reported that she had made all members' hotel reservations and that once she received the approvals for everyone's travel her will email the confirmation numbers. She also mentioned she has requested approval to purchase some non-refundable tickets to reduce the travel costs. She has communicated directly with the affected members.

Judi reported the meeting materials would be sent two weeks prior to the meeting. Judi reminded all members to review their itineraries for outbound and inbound flight time as well as name spelling (it must match your identification).

After some discussion, the committee agreed that their monthly conference calls could remain the same for 2011. The calls will be on the first Wednesday of each month at 1:00, Pacific Time. The new members will be polled to ensure the time and date works for them as well.

Herb mentioned that Tom Walker is the newly elected 2011 TAP Chair and John Kim is the 2011 TAP Vice Chair.

Herb reported TAP has adopted an official mentoring program and it will be implemented this year at the annual meeting. He also reported that all project committees would include at least one member from each area. Watch for an email solicitation requesting member's choices for their 2011 project committee.

### **Recap Action Items and Timeframes—Tim Shepard**

Tim recapped the following action items:



The following issues were dropped:

- Issue #18750 Exam Representatives-cannot Speak English well enough to be understood
- Issue #17323—POA-Representative Info takes too long to load on accounts
- Issue #17522—Offer in Compromise-Change for the better
- Issue #17523—Joint Venture-should be able to file one schedule C
- Issue #18788—Have TAS Help Taxpayers with ITINS

The following issues were closed:

- Issue #17660—Accessing own account info on website
- Issue #18762—Make payments match business quarterly payments

Tim will send a closing letter to Harlan and Nancy on the following issues:

- Nancy—Issue #18788
- Harlan—Issue #18762

**Member Comments/Other Business—Herb Bohrer**

None

**Closing-Designated Federal Official—Teresa Thompson**

Teresa Thompson closed the meeting.





**Taxpayer Advocacy Panel  
Area 6 Committee  
Meeting Minutes  
October 6, 2010**

**Designated Federal Official**

Teresa Thompson, DFO

**Attendance**

Kirsten Ball  
Harlan (Doc) Barnett  
Eileen Birge  
Herb Bohrer  
Dean Conder  
Nancy Eik  
Joan Gustafson  
Richard (Rick) Holland  
Charnia Parrish  
Karla Toomer

**Staff**

Judi Nicholas, TAP Manager  
Tim Shepard, TAP Analyst  
Nina Pang, TAP Analyst  
Kymberly Axtell, TAP Secretary

**Guest**

None

**Absent:**

Beverly Phillips

**Opening/Welcome/Announcements**

Teresa opened the meeting. Kymberly completed roll call and quorum was met. Herb Bohrer welcomed everyone.

**Approval of August Meeting Minutes**

Minutes were approved as written.

**Outreach Corner**

Herb spent a week at the Eastern Idaho State Fair. He reminded everyone that to be reimbursed for outreach travel Judi has to approve the expense prior to the travel.

Nancy Eik attended an outreach in Hamilton, MT called Military Stand Down, hosted by the American Legion and the Veterans of Foreign Wars. The event is to provide free items from the excess military supplies to the community. Nancy said that she would be doing another one in Missoula, MT in October.

**Citizen Input**

None

**Taxpayer Burden Subcommittee Report—Rick Holland**

Rick reported on the following issues:

**Issue #17282—Appeals Process Unreasonably Slow**—Rick provided a brief background on the issue and the recommendation is to split the issue into two separate proposals for the IRS to consider:



a) change the wording to the letter that you get back from Appeals and b) give TAS the authority to step in severe cases.

**Decision**—the full committee, by consensus, approved the issue for the Joint Committee’s October meeting.

**Issue #17334—IRS Notices-Taxpayers Respond**—Rick provided a brief background on the issue and stated that the issue is similar to Area 7 Issue #17398.

**Decision**—the full committee, by consensus, dropped the issue since it is being addressed by Area 7 (Issue #17398).

**Issue #18121—Qualified Dividends & Capital Gain-Problems with Instructions**—Rick provided a brief background on the issue and said the IRS had implemented the change after subcommittee had brought it to their attention. **Decision**—the full committee, by consensus, approved the issue to be written up and elevate to the Area QR in order to make it to the October Joint Committee agenda.

#### **Miscellaneous Subcommittee Report—Nancy Eik**

Nancy reported on the following issues:

**Issue #17140—Feedback section needed on IRS website**—Nancy provided a brief background on the issue and the recommendation that there be more flow charts, decision trees and graphics for taxpayers to find answers to tax questions without calling the IRS.

**Decision**—the full committee, by consensus, approved the issue (subject to goal statement change) which will be forwarded for Joint Committee’s October meeting.

**Issue #17299—Notice CP-2100 paper data sent unsecured**—Nancy provided a brief background on the issue and the recommendation that all CP-2100’s be sent on CD’s with encryption.

**Decision**—the full committee, by consensus, approved the issue (subject to modifications to title name and fonts) which will be and forwarded for the Joint Committee’s October meeting

**Issue 18101—Refunds-Where is my refund**—Nancy provided a brief background on the issue and the recommendation is that the issue be dropped based on lack of contact information from the taxpayer and the inability to get more details.

**Decision**—the full committee, by consensus, dropped the issue because it is outside of TAP’s scope.

**Issue #17523—Joint Venture-should be able to file one schedule C**—Nancy provided a brief background on issue and stated that the committee had received more information and is still working the issue.

#### **IRS Services Subcommittee Report—Harlan Barnett**

Harlan reported on the following issues:

**Issue #17280—Practitioners want a list of POA’s**—Harlan provided a brief background on the issue and the recommendation that the IRS develop a report available on e-services for Practitioners to use in order to sort their POA’s.

**Decision**—the full committee, by consensus, approved this issue for elevation to the Joint Committee.

**Issue #17325—Confirmation number or reference info required for each contact**—Harlan provided a brief background on the issue and the recommendation that the IRS implement a procedure where IRS call sites provide the taxpayer their name and IRS employee ID number at the beginning and end of phone calls.

The Area approved the issue in the July meeting and it ready for October Joint Committee meeting.

Judi reminded the full committee of the issue approval process. Once the Area approves an issue and it goes to Joint Committee quality review the issue does not need to come back to the Area for approval to changes recommended by the Joint Committee QR.



**Issue #17444—Rollover Gain**—Harlan provided a brief background on the issue and suggestion that a slight wording change (adding the word of) would add clarity to the instructions. The committee discussed whether to submit a written referral for such a minor change. The committee agreed that the recommendation should be forwarded to the IRS program owner via email.

**Issue #18183—Amended Returns should eliminate need for payment**—Harlan reported that the subcommittee feels the assertion by the submitter is not correct thus they recommend dropping the issue. **Decision**—the full committee, by consensus, dropped the issue because the submitter’s assertion is incorrect.

**Issue #17209—E-File form 8283**—Harlan reported that this issue is very similar to Area 7 Issue #17012 which Area 7 dropped. The subcommittee recommends this issue also be dropped.

**Decision**—the full committee, by consensus, dropped the issue based on inability to change problems on one form.

**Action:** The subcommittee will prepare a closing letter to the submitter directing them to the Electronic Tax Administration Advisory Committee.

**Issue #17660—Accessing own account info on website**—Harlan reported that the subcommittee will continue working on this issue at their next meeting.

#### **Screening Committee—Rick Holland**

Rick reported on the following issues:

**Issue #18100—Toll-free Info given incorrect**—Rick provided a brief description of the issue reported problem statement was broad and didn’t provide a specific issue to work. Harlan will write the closing letter.

**Decision**—the full committee, by consensus, dropped the issue because the National Taxpayer Advocate, Nina Olsen has this issue on her radar screen.

**Issue #18433—1099-R Income**—Rick provided a brief description of the issue and the committee recommends dropping the issue because they feel the form as written is understandable. **Decision**—the full committee, by consensus, dropped the issue because the form is clear.

**Issue #18763—Have taxpayers file year round**—Rick provided a brief description of issue and the committee recommends this issue be dropped because the issue is out of TAP’s scope.

**Decision**—the full committee, by consensus, dropped the issue because it is out of TAP’s scope.

#### **Recap Action Items and Timeframes—Tim Shepard**

Tim recapped the following action items:

**Issue #17282**—the issue will be renumbered as two separate issues and elevated to Joint Committee.

**Issue #18121**—Rick will write the referral form.

**Issue #17240, Issue 17299 and Issue 17325**— these issues will be forwarded to Susan Gilbert to be added to the Joint Committee October Agenda.

**Issue #17444**—Email the suggestion to IRS since it is such a small change

**Issue #18100**—Harlan will write the closing letter.

Tim will send an email to solicit for members write the closing letters for the three issues that were dropped by the screening committee.

Tim will make formatting change to the closing letter for Issue #18100.

#### **Member Comments/Other Business—Herb Bohrer**

Herb reminded everyone that the Joint Committee Chair and Vice Chair elections would be continuing through October 15.



Rick Holland wanted feedback from other panel members regarding their thoughts about some of the candidates for Chair and Vice Chair. Herb recommended Rick email the candidates with questions.

Herb reported that the replacement for the South Dakota member would join the committee at the annual meeting since it is so close.

**Closing-Designated Federal Official—Teresa Thompson**

Teresa Thompson closed the meeting.



**Taxpayer Advocacy Panel  
Area 6 Committee  
Meeting Minutes  
September 1, 2010**

**Designated Federal Official**

Teresa Thompson, DFO

**Attendance**

Kirsten Ball  
Harlan Barnett  
Herb Bohrer  
Dean Conder  
Nancy Eik  
Richard Holland  
Charnia Parrish  
Beverly Phillips  
Karla Toomer

**Staff**

Judi Nicholas, TAP Manager  
Tim Shepard, TAP Analyst  
Nina Pang, TAP Analyst  
Kymberly Axtell, TAP Secretary

**Guest**

None.

**Absent:**

Chris Paustian  
Joan Gustafson

**Opening/Welcome/Announcements**

Teresa opens the meeting. Kymberly does roll call and quorum was met. Herb welcomes everyone. Judi requests to add an additional item at the end of the agenda regarding the TAP Alignment. Karla provides a quick update to Chris Paustian's condition.

**Approval of August Meeting Minutes**

Harlan requests a change to the second page under IRS Services Issue number #17244 should be Issue # 17444. Committee approves minutes after correction made.

**Outreach Corner**

Harlan spoke about his visit and outreach to his doctor and stated he sent a letter to the physician and presented her with the TAP brochure. Herb spoke about a visit he had with Idaho Senator, Mike Cringle. The Senator had no knowledge of Taxpayer Advocacy Panel or what the panel did, however he did recognize the name Nina Olson, National Taxpayer Advocate.

**Citizen Input**

None.

**Communication Technology Letter—Herb Bohrer**

Herb explained the efforts of the Communication Committee their desire to find out how many times members were able to get the link to the TAP website placed on other webpage's. He discussed the need for the Communication Committee to identify how much exposure TAP get from other



organizations.

#### **Miscellaneous Subcommittee Report—Nancy Eik**

Nancy Eik provided an update on the following issues:

**Issue #17140—Feedback section needed on IRS website**—Nancy provided a brief background on the issue. The subcommittee recommends that this issue be broken into two different issues. The subcommittee recommends the part of the suggestion regarding providing a place for comments on website be dropped since it is already present on the site. The other suggestion regarding instructional flowcharts will be developed into a. Harlan volunteered to do quality review on the eventual referral.

**Issue #17299—Notice CP-2100 Paper Data Sent Unsecured**—Nancy provided a brief background on the issue. The subcommittee is currently developing a referral which will be ready for next month's meeting. Harlan volunteered to do the quality review on the eventual referral.

**Issue #17301—Refund received-using different SSN's and W-2's**—Nancy provided a brief background regarding issue. The subcommittee recommended that the issue be closed because there is currently an identity theft process in place. The submitter will receive a letter of explanation from the subcommittee.

**DECISION: Full committee, by consensus, decided to close issue.**

**Issue #17523—Joint Venture-should be bale to file one schedule C**—Nancy stated that the subcommittee will be still working on this issue and gathering more information.

**Issue #18101—Refunds-where's my refund**—Nancy stated the subcommittee will be gathering more research on the issue which is their active issue.

**Issue #18184—Explain why expenses are disallowed on notices**—Nancy reported that issue will be combined with Issue #17334 from Area 7.

#### **IRS Services Subcommittee Report—Harlan Barnett**

Harlan Barnett provided an update on the following issues:

**Issue #17280—CAF Representative/Client Listing-Want a Print out**—Harlan reported that the subcommittee was finishing the final touches on the referral form and that it would be ready for approval at the next meeting. Dean Conder volunteered to do the quality review.

**Issue #17444—Rollover Gain**—Harlan reported the subcommittee received additional information and were able to move forward on the issue and should have the draft referral done and ready for approval by the next area meeting.

**Issue # 17660—Accessing own account info on web site**—Harlan reported the subcommittee is waiting for some additional information and that the subcommittee will be working on the issue.

**Issue # 18183—Amended returns should eliminate need for payment**—Harlan reported subcommittee had requested some more research and would be working the issue at their next meeting.

**Issue # 17209—E-File form 8283**—Harlan reported subcommittee recommended that the issue be combined with Area 7 Issue #17012. Area 7 dropped Issue #17012, and the Area 6 subcommittee decided to combine Issues #17209 and Issue #17012, and the requested more research which will be discussed at their next meeting.



### **Taxpayer Burden Subcommittee Report—Rick Holland**

Rick Holland provided an update on the following issues:

**Issue #17334—IRS Notices-Taxpayers Respond**—Rick reported that the subcommittee has requested more research and will be discussing issue at their next meeting.

**Issue #17545—Form 1040-online form does not total or import tax due on income**—Rick provided a brief background on issue, stating that IRS is not in the business of tax preparation and does not want to compete with the software companies. The subcommittee recommends this issue be dropped. The subcommittee will provide letter to submitter to explain why issue was dropped.

**DECISION: The full committee, by consensus, decided to drop the issue.**

**Issue # 18121—Qualified Dividends & Capital Gain-problems with instructions**—Rick reported that the subcommittee has requested more research and will be discussing issue at their next meeting.

### **Planning for Annual Meeting—Herb Bohrer**

Herb reported that the Annual Meeting planning is an on-going process and that if anyone had anything to discuss at the meeting or any suggestions to email him or Susan Gilbert.

Judi mentioned that the agenda has been drafted and the workshops have been decided, however, if anyone has any other suggestions to turn them in so they can be added to the agenda. She also suggested that October meetings to discuss potential agenda topics.

Rick asks if the area had a lot of new issues for the screening committee. Judi stated that Tim would run the report upon his return and that the tax forums should have also produced some of issues.

**ACTION ITEM: Tim to run new issue report for Area 6 upon his return from National Tax Forum in San Diego.**

### **Mentor new members—Herb Bohrer**

Herb stated that there will be a mentoring program for new members and that if anyone has ideas for the program or if anyone is interested, please let him know.

### **Joint Committee Business-Herb Bohrer**

Herb reported that the Joint Committee will be beginning another task group designed to specifically provide recommendations about Correspondence Audits to the Joint Committee. They are requesting to one volunteer from each area and if anyone wanted to volunteer to contact himself or a staff member. The new task group plans to have their first meeting on September 14, so any volunteers needed to voice their desires by the week of September 7th.

### **Recap Action Items and Timeframes-Judi Nicholas**

Judi reviews the following items:

- Correct the August minutes prior to posting
- Tim will run the new issue report upon his return to the office.

### **Member Comments/Other Business-Herb Bohrer**

Dean reports that the San Diego tax forum is going well. Everyone seemed to be enjoying the freebies and they have gotten several potential issues. Tim reported that the number of participants in San Diego is smaller as compared to Las Vegas. Dean suggested that next year we put the suggestion mailer into the registration packet for attendees.

Judi reported that Taxpayer Advocate Service has been realigned to add two more areas. The Taxpayer Advocacy Panel follows Taxpayer Advocate Service alignment but instead of adding two more areas, TAP has restructured some of the areas. She mentioned that there will be an email that will include a map of the new realignment. The change is effective December 1st which begins the new



TAP year. Departing members will continue as they have been with their subcommittee till the Annual meeting then switch over to their new areas.

**Closing-Designated Federal Official-Teresa Thompson**

Teresa Thompson closed the meeting.





**Taxpayer Advocacy Panel  
Area 6 Committee  
Meeting Minutes  
August 11, 2010**

**Designated Federal Official**

Judi Nicholas, Acting DFO

**Attendance**

Kirsten Ball  
Harlan Barnett  
Herb Bohrer  
Dean Conder  
Nancy Eik  
Joan Gustafson  
Richard Holland  
Charnia Parrish  
Karla Toomer

**Staff**

Tim Shepard, TAP Analyst  
Nina Pang, TAP Analyst  
Kymberly Axtell, TAP Secretary

**Guest**

None.

**Absent:**

Teresa Thompson, Designated Federal Official  
Beverly Phillips  
Chris Paustian  
Eileen Birge

**Opening/Welcome/Announcements**

Judi Nicholas opened the meeting. Herb Bohrer welcomes everyone and reviews the agenda. Harlan Barnett states that when it comes to his section, he will speak about Issue #17280 and the two new issues that are not on the agenda.

**Approval of February Meeting Minutes**

The meeting minutes were approved as submitted. Harlan states that he will follow up on Issue #17325 with Tom Walker to inquire about the Joint Committee Quality Review of issue.

**Outreach Corner**

Harlan said he would make contact with the accountants and CPA's in town to touch base and speak with them. Herb said he would make contact with the radio station to speak with them.

**Citizen Input**

None

**Taxpayer Burden Subcommittee Report—Rick Holland**

Rick provided an update on the following issues:

**Issue #17282—Offer In Compromise Appeal—No Decision by the IRS**—Rick provided a brief background of the issue and said that the subcommittee is requesting approval from the full committee for further elevation to the Joint Committee. Discussion of the full committee suggested



attachments will be called appendixes and will be labeled as such. Harlan Barnett will be the Quality Review for the Area and after his review and any minor changes, Area Committee, by consensus, decide to approve issue for elevation to Joint Committee.

**Issue #17324—Fee Involved with online payments**—Karla Toomer spoke briefly about issue, stating that upon research of issue, it was clear to subcommittee that website clearly states that there is a fee required if used. Subcommittee will drop issue. Area Committee suggests putting a more descriptive reason as to why issue was dropped prior to dropping issue.

**Issue #16948—TAS Employee Rude—Hung Up**—Karla spoke briefly about issue stating that research found that employee probably no longer worked for the IRS and without a way to contact taxpayer to get more information, there was nothing more the subcommittee could do. Area Committee, by consensus, decides to drop the issue.

Karla suggests that from now on when issues that deal with employee concerns is brought to the committee sooner than later and that the contact information be documented well.

#### **Miscellaneous Subcommittee Report—Nancy Eik**

Nancy provided an update on the following issues:

**Issue #17296—Refunds-Examine Requests for Refunds**—Nancy provided background for the issue. The subcommittee recommends dropping issue because it is not an accurate reflection of IRS practices. Full committee, by consensus, drops the issue.

Nancy stated that the subcommittee has a few other issues that they will be discussing at their next meeting.

#### **IRS Services Subcommittee Report—Harlan Barnett**

Harlan provided an update on the following issues:

**Issue #17209—E-file Form 8283**—Harlan provided background on the issue. Subcommittee found out that Area 7 has a similar issue and has decided to combine the issue with the Area 7's issue. Full committee, by consensus, concurs with combining of issues.

**Issue #17093—Enforcement-Non filing taxpayers**—Harlan provided background on issue. Subcommittee suggests getting the person who submitted the issue the report in regards to his concerns and drop the issue. Full committee, by consensus, will ensure that submitter is directed to report and drops the issue.

**Issue # 17280—Practitioners want list of POA's**—Harlan provided background on the issue and said that the subcommittee will be doing more research on this and the issue is their next active issue.

**Issue #17244—Rollover Gain**—Harlan provided background on the issue and said that the subcommittee will be doing more research on the issue and will be working issue further.

**Issue #17660—Accessing own account info on web site**—Harlan provided background on the issue and said the subcommittee will be gathering more research and will be working the issue further.

#### **Screening Committee—Nancy Eik**

Nancy reviews the following issues and recommends that they be dropped:

**Issue #17446—Schedule D-Variious Answers**—Nancy provided a brief description of the issue, stating that it would be a huge task for TAP to take on.

**DECISION: The full committee, by consensus, decided to drop this issue.**

**Issue #17447—Audits-Information**—Nancy provided a brief description of the issue, stating that it would be outside of the scope of TAP to work issue.

**DECISION: The full committee, by consensus, decided to drop this issue.**

**Issue #17635—IRS Re-Organization-Does Not Work**—Nancy provided a brief description of the issue, stating that it would be outside the scope of TAP. Issue is more of a TAS issue and Nina Olson, National Taxpayer Advocate, has it on her radar.

**DECISION: The full committee, by consensus, decided to drop this issue.**

**Issue # 17658—Revenue Officer-Rogue**—Nancy provided a brief description of the issue, stating that it is outside the scope of TAP.



**DECISION: The full committee, by consensus, decided to drop this issue.**

**Issue #18100—Toll-Free-Incorrect Info Given**—Nancy provided a brief description of the issue, stating that it is not in the scope of TAP.

**DECISION: The full committee, by consensus, decided to drop this issue.**

**Issue #18106—Town Hall Meetings-Distance Education Option**—Nancy provided a brief description of the issue, stating that town halls are no longer in affect so issue is no applicable and not in the scope of TAP. Tim states that he has sent an invitation to the submitter to join the next area committee meeting.

**DECISION: The full committee, by consensus, decided to drop this issue.**

**Issue #18185—TAC hours not convenient**—Nancy provided a brief description of the issue, stating that Area 7 has a similar issue so the issues should be combined.

**DECISION: The full committee, by consensus, decided to combine with Area 7 issue.**

**Issue #18186—can't file electronically due to loss CPA**—Nancy provided a brief description of the issue, certain items can not be submitted electronically and with no contact information, no way of letting submitter know.

**DECISION: The full committee, by consensus, decided to drop this issue.**

**Issue #18188—CP-53—entire SSN used in Letter**—Nancy provided a brief description of the issue, stating that changes are being implicated and most notices are going out without full SSN's on them.

**DECISION: The full committee, by consensus, decided to drop this issue.**

**Issue #18189—E-file Returns—PIN number**—Nancy provided a brief description of the issue, stating that Area is unable to address this issue due to lack of contact information for the submitter.

**DECISION: The full committee, by consensus, decided to drop this issue.**

**Issue #18352—Withholding-Informal Employment**—Nancy provided a brief description, stating that is nothing that the area could answer to and legislative.

**DECISION: The full committee, by consensus, decided to drop this issue.**

### **Joint Committee Business-Herb Bohrer/Harlan Barnett**

Joint Committee's Face to Face was held in Chicago and it was a very productive meeting.

Discussion was focused around the TAS expanding to nine areas vice seven. TAP in general has mirrored the TAS program with the areas, so questions were brought up about TAP expanding to nine areas, but after discussing it, it appeared that certain areas would loose some states while others gained some states.

Annual meeting continues being a main focus of the Joint Committees work and the Joint Committee and TAP Staff are trying to make sure that the meeting is a well organized and beneficial meeting. The issues up for approval were very well prepared showing that the Quality Review process is working and went fine.

### **Recap Action Items and Timeframes-Tim Shepard**

Tim repeated the following action items:

Rick Holland will forward Issue#17282 to Harlan for the Area Quality Review process.

Tim Shepard will update the issue database with the recommended reasons for dropped Issue #17324 and Issue #16948

### **Member Comments/Other Business-Herb Bohrer**

Full committee held discussion regarding Chris Paustian and his recovery from a medical condition. Everyone provided their warm wishes and thanked Karla for following up with Chris's wife regarding his condition. Herb requested that if anyone received an update on his condition to let everyone know.

Harlan said that he would do a few formatting changes to the Joint Committee Referral form for Issue #17282 and get it back to the subcommittee and Tim Shepard for the final approval. Tim will then



forward up to the Program Analyst for the Joint Committee to begin Joint Committee Quality Review and Approval.

**Closing-Designated Federal Official-Judi Nicholas**

Judi Nicholas closed the meeting.



**Taxpayer Advocacy Panel  
Area 6 Committee  
Meeting Minutes  
July 7, 2010**

**Designated Federal Official**

Teresa Thompson

**Attendance**

Kirsten Ball  
Eileen Birge  
Herb Bohrer  
Dean Conder  
Nancy Eik  
Joan Gustafson  
Richard Holland  
Charnia Parrish  
Chris Paustian  
Karla Toomer  
Beverly Phillips

**Staff**

Janice Spinks, TAP Analyst  
Tim Shepard, TAP Analyst  
Nina Pang, TAP Analyst  
Kymberly Axtell, TAP Secretary

**Guest**

None.

**Absent:**

William Mezger, Acting TAP Program Manager  
Harlan Barnett

**Opening/Welcome/Announcements**

Teresa Thompson opened the meeting. Herb Bohrer welcomes everyone and reviews the agenda.

**Approval of February Meeting Minutes**

The meeting minutes were approved as submitted.

**Outreach Corner**

Charnia Parrish spoke about attending the Partner Liaison Meeting in New Mexico and found that it was very helpful and there were lots of practitioners. She also mentioned that if possible she would attend a few more that were within driving distance to her.

Chris Paustian stated that he would be attending the Partner Liaison Meeting in August for his state of South Dakota and also said it was a good meeting to attend.

Herb stated that he attended a small business meeting in Idaho where he was able to expose a lot of practitioners to TAP.

Joan Gustafon mentioned that she would have another IRS partner meeting in Phoenix that she would



be attending which is a good way to expose TAP and to let the committees now what TAP is working on.

### **Citizen Input**

None.

### **Miscellaneous Subcommittee Report- Nancy Eik**

Nancy provided an update on the following issues:

**Issue #17087—Licensed Tax Preparer-Wants Test Online**—Nancy said that the IRS is working on this; however the final date has not been finalized. Once project is complete it will be going to a third vendor but it has not been decided if the final version would be on paper or online.

Dean mentioned he had recently attended a Partner Liaison Meeting and one of the presenters said that all paid preparers would be made to register online and test online as well and he also mentioned that all enrolled agents would register online, but they would not be made to take test.

### **Taxpayer Burden Subcommittee Report- Rick Holland**

Rick asked that Kirsten Ball provide an update on the following issues:

**Issue #17282—Offer in Compromise Appeal-No decision by the IRS**—Eileen Birge spoke and provided a brief background of the issue and said that the subcommittee will be discussing it further in future meetings.

Herb provided the name of the Local Taxpayer Advocate in Brooklyn Bernardita Tehrani, stating that she seemed to be the SME on the Taxpayer Advocacy Service.

**Issue #17096—Improve IRS service by opening some centers on Saturday**—Richard Holland spoke and provided a background of the issue and said that the subcommittee needs to gather the statistics from the previous Solution Saturdays before making any decisions about the issue.

Herb provided Ellen Smiley's name to Tim Shepard as to assist in gathering those statistics.

### **IRS Services Subcommittee Report- Herb Bohrer**

Herb provided an update on the following issues:

**Issue 17325—Confirmation number or reference info required for each contact**—Herb spoke and provided a little background. Subcommittee is recommending that at the end of the call to provide the customer some kind of confirmation number or reference number and to better ensure that the IRS phone operator inputs the information. Issue has been through Area 6 Quality Review and a few minor corrections have been made. **Decision**—Full Committee decides to forward the issue to the Joint Committee.

**Issue 17300—contacting a Revenue Officer for Case Status**—Subcommittee recommends that issue be dropped due to IRM changes that satisfy this issue.  
**Decision**—Full Committee, by consensus, drops this issue.

**Issue 16876—Toll-free Line-Wait is long for Cell users**—Herb mentioned that Harlan received some new information and the subcommittee will be discussing it further.

### **Joint Committee Business-Herb Bohrer**

Herb spoke briefly about the various subcommittees within the Joint Committee, stating that at the Face to Face meeting being held in Chicago, the subcommittees will be discussed and he would provide more information next month.

Herb also mentioned that the recruiting process is moving along. Kymberly mentioned that the interview process is complete and that the selection process is still continuing.



**Recap Action Items and Timeframes-Tim Shepard**

Tim listed the following as being the action items:  
Bernardita Tehrani LTA in Brooklyn  
Ellen Smiley regarding Solution Saturday statistics  
Dropping Issue 17300

**Member Comments/Other Business-Herb Bohrer**

Chris mentioned that Nina Olson's mid year report has been posted on IRS.gov under news room article.  
Janice Spinks officially passes Area 6 to Tim Shepard and she will be still the back-up Analyst and that it's been a pleasure working with everyone.

**Closing-Designated Federal Official-Teresa Thompson**

Teresa Thompson closed the meeting.



**Taxpayer Advocacy Panel  
Area 6 Committee  
Meeting Minutes  
June 1, 2010**

**Designated Federal Official (DFO)**

Teresa Thompson

**Attendance**

Kirsten Ball  
Harlan Barnett  
Eileen Birge  
Herb Bohrer, Chair  
Nancy Eik, Vice-chair  
Charnia Parrish  
Chris Paustian

**Staff**

William Mezger, acting TAP Program Manager  
Janice Spinks, TAP Analyst  
Nina Pang, TAP Analyst  
Timothy Shepard, TAP Analyst  
Kymberly Axtell, TAP Secretary

**Absent:**

Dean Conder  
Joan Gustafson  
Richard Holland  
Beverly Phillips  
Karla Toomer

**Opening – Designated Federal Official**

Teresa Thompson opened the meeting.

**Roll Call**

Kymberly took roll and a quorum was met.

**Welcome/Announcements/Review Agenda**

Herb welcomed the members and reviewed the agenda.

**Approval of May Meeting Minutes**

The committee reviewed the May meeting minutes.

**DECISION: The committee approved the meeting minutes from the May meeting as submitted.**

Herb thanked Eileen for her TAP service. The May minutes did not recognize Eileen for her work on the panel and he wanted to be sure she was recognized.

**Outreach Corner**

Harlan shared that he was going to Southern California and planned to take outreach material with him to hand out.





Herb asked Kymberly what kind of outreach material she had. Kymberly indicated that she had mailed everyone 25 new TAP suggestion mailers. Kymberly asked the panel members if they would email her with their request and she would send them any outreach material they requested.

### **Citizen Input**

There was no citizen input.

### **IRS Services Subcommittee Report**

Harlan updated the committee on the IRS Services Subcommittee's issues.

- **#17325 (Changes Fixed – Not Really Fixed)** – Area 2 has a similar issue which is going through Joint Committee QR. Harlan had emailed Area 6 for their thoughts about combining the two issues. Area 2 decided not to combine with the Area 6 issue. The new title for issue #17325 is **Confirmation Number or Reference Information Required for Each Contact**. The subcommittee is now seeking approval to elevate this referral. Herb would like this to referral to go through the Area 6 Quality Review first. After Area 6 conducts a quality review, Herb hopes it will be ready to be elevated at the next meeting.
- **#16876 (Toll-Free Line – Wait is Long for Cell Users)** - This issue pertains to cell phone users contacting the IRS. The subcommittee wanted to know if the IRS had ever considered a callback feature. Harlan contacted Jim Hannas who made a phone presentation at the TAP annual meeting in December. Jim's response was it had been discussed and this feature, along with other features is awaiting the funding approval. The subcommittee will park this issue and see if funding becomes available.

### **Miscellaneous Subcommittee Report**

Nancy updated the committee on the Miscellaneous Subcommittee's issues.

- **#17087 (Licensed Tax Preparer – Wants Test Online)** – There is an implementation team working on this issue. The subcommittee wanted to know if a Statement of Work (SOW) has been developed and what it consisted. Bill Mezger informed committee members that there will be a webinar on June 9th regarding new requirements for paid preparers.

Tim added that there is no Statement of Work for this issue.

### **Taxpayer Burden Subcommittee Report**

Kirsten informed the Area 6 Committee that the subcommittee had a meeting since their face-to-face meeting, there were no changes and she did not have anything to add.

### **Joint Committee (JC) Business**

Herb provided the following information from the JC:

- The Joint Committee discussed the combining of issue #17325 and the Area 4 issue. The JC discussed the formation of a group, which will conduct background investigations on what the role of the Joint Committee should have, combining issues and developing a recommendation.
- The JC also discussed opening up each Area's parking lot of issues, which are not being worked on, so the other analysts will be looking out for similar issues.
- There is a subcommittee working on the strategic plan. Herb has been participating in that subcommittee.
- The Joint Committee face-to-face meeting will be in Chicago, July 8 – 10.



### **Reschedule August Meeting**

TAP staff will be at their symposium during the next Area 6 meeting. The full Area discussed different dates to hold their next meeting. Teresa mentioned that she will not be available August 11th and the acting DFO for the August meeting will be either Bill or Judi.

**DECISION: The next Area 6 meeting will be held Wednesday, August 11th at the same time, 1:00 p.m. Pacific Time, 2:00 p.m. Mountain Time, 3:00 p.m. Central Time.**

**ACTION ITEM: TAP staff will notify Shelby McKenzie so the date will be captured in the Federal Register.**

### **Recap ACTION ITEMS and Timeframes**

Nina recapped the action items.

### **Member Comments/Other Business**

Tim informed Area 6 that he was their new analyst and he looked forward to working with the panel members. He encouraged them to contact him if they had questions.

Herb mentioned that the only performance measure the Joint Committee and TAP uses is the number of issues that are forwarded on and this year, Area 6 had not forwarded any issues. Herb believed Area 6 spent more time working an issue in depth. This discussion will continue at the Joint Committee.

### **Closing – Designated Federal Official**

Teresa closed the meeting.



**Taxpayer Advocacy Panel  
Area 6 Committee  
Portland, OR  
Meeting Minutes  
May 6, 2010**

Thursday, May 6, 2007

Friday, May 7, 2007

Saturday, May 8, 2007

**Designated Federal Official**

Teresa Thompson

**Attendance**

Herb Bohrer, Chair

Kirsten Ball

Harlan Barnett

Eileen Birge

Dean Conder

Nancy Eik, Vice-chair

Joan Gustafson

Richard Holland

Beverly Phillips

Charnia Parrish

Chris Paustian

Karla Toomer

**Staff**

Judi Nicholas, TAP Program Manager

Janice Spinks, TAP Analyst

Kymerly Axtell, TAP Secretary

**Guest –Judi Nicholas**

Shelley Ashurex, Acting Local Taxpayer Advocate for Portland

David Vawser, Senior Analyst, Responsible for Outreach within TAS

**Opening—Teresa Thompson**

Teresa officially opens the meeting

**Thursday, May 6, 2010**

**Welcome/Announcements**

Herb welcomed everyone and briefly reviewed the agenda.

Judi announced that the Seattle office has a new analyst; Tim Shepard will start May 24th and comes from ACS as a manager.

She also reported that Bill Mezger will be filling in behind her as the Seattle TAP Manager while she is away on her 60-day detail. He is an experienced manager within TAS and just needs to learn TAP. He will also be starting the 24th of May.

**Introductions—** Everyone took the opportunity to introduce themselves and the group welcomed panel member Beverly Phillips who is replacing Oregon member Lea Kear.



### **Outreach Corner-Herb Bohrer**

The outreach report was presented to the committee in year to date form. The Committee indicated they preferred the year to date format over the monthly format.

Charnia Parrish reported that she did a radio interview and various press releases with the paper.

Chris met the LTA and had the opportunity to meet the Governmental Liaison and he sent out 38 letters and put TAP link on his face book page.

Judi noted that LTA's typically meet with Congressional Liaisons and she encouraged members to partner with them.

Joan suggested members get in contact with the Senior Analyst opposed to the LTA, since she has most communication with the Senior Analyst.

Herb suggested that members find their local LITC (Low Income Tax Center), which is another good outlet for outreach.

Judi noted if that if members wanted to partner with LITC to get in touch with the LTA or go to web and Google LITC's and feel free to show up and introduce themselves.

Judi said that TAP will be doing all six of the Nationwide Tax Forums this year and there will be one Area 6 and one Area 7 person will attend each forum. The two locations will be San Diego, CA and Las Vegas, NV and there will be focus group sessions.

Charnia reviewed the Albuquerque, NM Town Hall in February; there were 18 participants and most stayed for the focus group session.

Dean reviewed the Denver, CO Town Hall in March; there were 35 participants and most were with the CPA society and there was one gentleman who brought his individual issue which was productive.

Kirsten suggested that TAP look into partnering with LITC during the annual meeting.

Recruitment—due to newspaper articles, television spots, etc, the applications increased significantly.

### **Joint Committee Report-Nancy Eik**

Nancy reported that the Joint Committee reviewed, elevated, and approved several issues. They also elevated five issue projects to the IRS.

Nancy reviewed the various TAP Staff that were taking on new roles and leaving the staff or going on detail.

Judi spoke about the tracking project which she is involved with on the Joint Committee, providing some background on the project and how it came about; and then gave an update on where the project was.

### **Project Committee Reports—**

**EITC (Earned Income Tax Committee)**—Eileen Birge spoke about two projects being worked within the EITC Project Committee:

- Training module for VITA (Volunteers Income Tax Assistance) where they are developing the module and gathering information



- To create a presentation for better explanation of who is eligible for and who can claim EITC (Earned income tax credit) for better use by people who are able to claim it.

**SBSE (Small Business Self Employed)**—Harlan Barnett said that the committee is working on five projects:

- IRS Calendar-project completed and sent to the IRS;
- Solution Saturdays-should be done within 30-45 days;
- Voluntary Agreements (TIPS)-should be done by August;
- Audit Technique Guides-used by auditors when they go out on audits;
- Chore Payment-will begin soon

**Field Assistance**—Dean Conder reported that the committee is working on a project that would allow individuals to make payments at banks and TAC (Taxpayer Assistance Centers) and allowing truckers the ability of getting their tabs by expanding to third party vendors. Another project was to get more brochures to better explain what the TAC is.

**Notice Improvement**—Rick Holland reported that the committee reviews all notices prior to being sent to taxpayers to ensure the notice is well read and that the correct message is being conveyed to the taxpayer. The committee is also responsible for ensuring the IRS's way of formatting the notices match what the scoring sheet gives as to effectively make the notice work.

**Communication**—Chris Paustian reported that they are still trying to get the improveIRS.org on the congressional website.

**Internal Communication**-Karla Toomer requested from members what they want or need from a website. She says that she works with the surveys and customer satisfaction.

**Annual Report**-Joan Gustafson reported that the annual report is almost completed and editing it and developing the cover.

**Tax Forms & Pubs/MLI (multi-lingual initiate)**—Charnia Parrish reviewed the different forms that the committee has been working on. She indicated Patty Wagner is the Program Owner and is also the TAP liaison.

#### **IRS Organizational Structure-**

This issue originated from a Town Hall from a taxpayer who was complaining that there was not any local problem solving help. The issue is how to bring the local knowledge to the forefront.

Judi provided the committee the background pieces, provided pictures of the before and after of the reorganization of the RRA98. Suggestions were made to think of ways to attack this issue, what kind of data to gather, how to figure out what services are and are not working for the customer, where to find the right data etc.

Discussion by the full committee resulted in Area 6 needing to gather more information so they can decide whether or not to pursue the issue further. Judi stated that she would go back to Shawn, to get further information as to exactly what Nina wanted to know.

#### **Approval of April Meeting Minutes**

The meeting minutes were approved as submitted.

End of day announcements.



## **Friday, May 7, 2010**

Herb opened the meeting.

Judi reviewed what to expect and how the subcommittees will work.  
-Most of the work takes place within the subcommittees

The subcommittees broke into their respective committee's for the remainder of the day.

### **Miscellaneous Subcommittee Report- Nancy Eik**

Notes were taken by Judi Nicholas. See information below for meeting details. .

### **IRS Services Subcommittee Report- Harlan Barnett**

Notes taken by Kymberly Axtell

### **Taxpayer Burden Subcommittee – Rick Holland**

Notes were taken by Janice Spinks; see information below for meeting details.

Judi handed out everyone's biographies for their review and asked them to make changes and return them.

Meeting closed for the day.

## **Saturday, May 8, 2010**

### **Taxpayer Burden Subcommittee Report- Rick Holland**

- **#17282 (Offer In Compromise Appeal – No Decision by the IRS)** – The subcommittee discussed different ways to approach this issue. They have requested research. The full committee also discussed this issue.
- **#17336 (IRS Envelopes Are Too Small for Additional Documentation)** - The committee discussed this issue and agreed with the subcommittee's recommendation, to drop this issue. Area 7 referred an envelope issue to the IRS and the subcommittee did not think it would be cost effective to change the system, the subcommittee did not believe the problem was systemic and not fixable...a small percentage of taxpayers are affected by this.
- **#17323 (POA – Representative Info Takes Too Long to Load on Accounts)** – The subcommittee reported that the IRS was aware of the problem and they decided to return this issue to the parking lot and follow-up in six months to see if the process has been fixed.

### **IRS Services Subcommittee Report – Harlan Barnett**

- **#5320 (Minimize SSN on Correspondence/Lessen Identity Theft)** - The subcommittee recommended this issue be closed as issue fully accepted. Area 6 Committee agreed with the recommendation.
- **#17325 (Changes Fixed – Not Really Fixed)** – The subcommittee will begin the elevation write-up for this issue.
- **#17345 (Practitioner Hotline – Can't Answer Questions and Long Wait)** – The subcommittee recommended this issue be dropped, system in place and working. Area 6 Committee agreed with the recommendation.
- **#17327 (EFTPS – No Way to Make Non-Monetary Changes)** – The subcommittee recommended this issue be dropped; there is no direct link to the IRS due to security reasons. Area 6 Committee agreed with the recommendation.

- **#17332 (1040 Instruction Packet – No Master List of Forms and Pubs)** – The subcommittee recommended this issue be dropped due to a system in place, which is working. Area 6 Committee agreed with the recommendation.
- **#16876 (Toll-free Line – Wait is Long for Cell Users)** – The subcommittee will research this issue and gather more information. Harlan will email Jim Hannas to ask question as to whether the IRS is tracking cell versus landline usage.
- **#17329 (E-file Profile Each Business Required to List Forms Filed)** – The subcommittee recommended this issue be dropped, there is a system in place and it is working. Area 6 Committee agreed with the recommendation.
- **#17298 (Exams/Audits – Not Forwarding Documents for Processing)** - The subcommittee recommended this issue be dropped, there is a system in place. Area 6 Committee agreed with the recommendation.
- **#17300 (Contacting a Revenue Officer for Case Status)** – The subcommittee placed this issue back in the parking lot. They would like to follow-up with the issue and see if the IRM is changed. They will make a decision in June or when there is confirmation that the IRM has been changed.

#### **Miscellaneous Subcommittee Report – Nancy Eik**

- **#17318 (Identity Theft – No Method for Employer to Report to IRS)** – The subcommittee recommended this issue be dropped, this is an SSA issue rather than an IRS issue. Area 6 Committee agreed with the recommendation.
- **#17087 (Licensed Tax Preparer – Wants Test Online)** – The subcommittee requested research for this issue.
- **#17297 (Form 2848 Power of Attorney POA)** – The subcommittee recommended this issue be dropped, this issue was received prior to the revision of the Form 2848. Area 6 Committee agreed with the recommendation.
- **#17140 (Feedback Section Needed on IRS Website)** – The subcommittee will keep and work this issue.
- **#17267 (Schedule A Line 1 Instructions – Unclear)** – The subcommittee recommended this issue be dropped, they do not believe this is a systemic issue and the instructions and forms appear to be clear. Area 6 Committee agreed with the recommendation.
- **#17283 (Penalties – Timely Sent Forms 1099 & W-2)** – The subcommittee recommended this issue be dropped. The IRS does not have sufficient resources to work these issues and there is insufficient documentation to substantiate the issue. Area 6 agreed with the recommendation.
- **#17294 (Form 1099B – Reporting Repeated Redemptions)** – The subcommittee recommended this issue be dropped. This issue has been addressed with the new requirements for reporting of basis in financial assets. Area 6 agreed with the recommendation.
- **#17295 (IRS Systems)** – The subcommittee recommended this issue be dropped. There are too many processing variables in the audit reconsideration process to determine whether this is a systemic issue. Area 6 agreed with the recommendation.
- **#17296 (Refunds – Examining Requests for Refunds)** - The subcommittee requested research on this issue.
- **#17299 (Notice CP-2100 Paper Data Sent Unsecure)** – The subcommittee requested research on this issue.
- **#17301 (Refund Received – Using Different SSNS and W-2s)** - The subcommittee requested research on this issue.
- **#17316 (403b Participants – Exempt from Retirement Contribution Card)** – The subcommittee dropped this issue at the last meeting because it is a TEGE issue and TAP is not chartered to work TEGE issues. Area 6 agreed with the recommendation.
- **#17330 (Form 2553)** – The subcommittee recommended this issue be dropped. The instructions contain information about when to file. Area 6 agreed with the recommendation.



- **#17338 (Form 9465 – Electronic Funds Withdrawal info Misleading)** – The subcommittee will keep this issue. They would like to invite the practitioner to an upcoming call and obtain more details about the issue.

#### **New Issue Committee—Nancy Eik**

**Nancy reviewed the issues and the committee, by consensus, decided to drop each of the issues noted below:**

- Issue 16818 – Change to Form 1040EZ – reason: not systemic
- Issue 16889 – Rude Employees – reason: tried to call and email taxpayer , reply received
- Issue 16962 – Chapter 13-Should Not Hold Refunds – reason: legislative
- Issue 17010 – EIC-Should be Called Limited Income Credit – reason: would require legislation
- Issue 17025 –Form 1099 Not Available on Racks – reason: outside of TAP’s scope
- Issue 17040 –IRA Distribution-Shouldn’t be Taxed on Low Income – reason: legislative
- Issue 17079 –Form 1040A-Unable To Include Energy Credits – reasons: 1040A is for specific use. There is only so much room on 1040A and cannot add to it, otherwise it would a 1040.
- Issue 17082 –IRA Withdrawals No way to Claim as Capital Gains
- Issue 17083 –Tax Liens-Subordination – reason: individual issue, not systemic
- Issue 17086 –ITIN-Can’t Obtain to Report to Child Support Enforcement – reason: individual issue
- Issue 17088 –Form 1099 Series-Want to Submit Online – reason: issue has been elevated by Area 7
- Issue 17139 –First Time Home Buyers Credit returns taking longer than 12 weeks – reason: short term issue
- Issue 17141 –Investment Allowable Loss Timeframe Too Extreme – reason: legislative
- Issue 17178 –Corrected 1099 Needed-Company Bankrupt – reason: taxpayer was assigned an advocate in Kansas City. Seattle advocates contacted taxpayer.
- Issue 17393 –Income Averaging for General Taxpayers – reason: legislative

**The Committee, by consensus, decided to keep the below issues:**

- Issue 17093 –Enforcement-Non Filing Taxpayers
- Issue 17209 –E-File Form 8283
- Issue 17280 –CAF Representative/Client Listing-Want to print—Committee will focus on the E-Services part of issue

Dean brought up the fact that even though issues are dropped due to legislation, there should still be a way to forward the issues to Nina Olson.

Judi stated she would address this with Shawn.

#### **Travel Vouchers—Kymberly Axtell**

Kymberly handed out travel vouchers and requested the committee sign and confirm once they received their reimbursement after processing for better tracking purposes.

#### **Recruiting—Judi Nicholas**

Judi reported that the total number of applications for Washington at deadline was 83 applications. Ranking would be held May 5-10 and interview schedule would be completed and interviews would take place in June. Bill Mezger would participate in the interviews and the LTA (Local Taxpayer Advocate) would not be used during the interviews this year. The interview schedule would be sent out via email once complete.





**Timeline** – It is anticipated that they will be finished with interviews, waivers, tax checks by mid-July

She also reported that TITGA critiqued TAP on ensuring that a waiver would be done for tax compliance for all panel members.

Judi recommends while doing outreach to be thoughtful of what kind of questions might arise from the taxpayers question and to be sure to get better contact information for future use.

**Summary of Action Items – Janice Spinks**

Janice summarized the action items from the meeting accordingly;

- Judi noted that LTA’s typically meet with Congressional Liaisons and she encouraged members to partner with them...  
Action: Judi will inquire about this.
- Kirsten – suggested we partner with LITC’s during the annual meeting...  
Action: Judi will pass this along to her colleagues to see if this can be arranged.
- Judi – may be able to find out what’s happening with annual report in terms of who is working on the reorganization issue so that TAP can partner before going further...  
Action: Judi will address this with Shawn.
- Action: Judi – will have Shawn go back to Nina and inquire about the reorganization issue...looking at re-org and impact of services and spoke with TAP about working the issue...ask what was her thought process of what she would like TAP to address...better define the issue how to attack it.
- Action: Judi will consult with management staff about parking lot issues and obtaining more information
- Action: Janice/Kym will complete a survey regarding the FTF...info will be sent via email...responses will be compiled by Kym
- Action: A Thank you letter will be sent to Wayne Davis for the Ogden tour
- Action: Judi will address with Shawn how to pass on issues that are legislative...Herb will also address this at the JC level

Rick began acknowledgments of Dean...Herb acknowledged Dean as well and indicated he learned a great deal from him last year as Chair...Harlan indicated Dean has been a great friend and mentor and thanked him for his contributions to the TAP.

**Closing—Teresa Thompson, DFO**

Teresa officially closed the meeting.



**Taxpayer Advocacy Panel  
Area 6 Committee  
Meeting Minutes  
April 6, 2010**

**Designated Federal Official**

Teresa Thompson

**Attendance**

Kirsten Ball  
Harlan Barnett  
Eileen Birge  
Herb Bohrer  
Dean Conder  
Nancy Eik  
Joan Gustafson  
Richard Holland  
Chris Paustian  
Karla Toomer

**Staff**

Judi Nicholas, TAP Program Manager  
Janice Spinks, TAP Analyst  
Nina Pang, TAP Analyst  
Kymberly Axtell, TAP Secretary

**Guest**

None.

**Absent:**

Charnia Parrish

**Opening/Welcome/Announcements**

Teresa Thompson opened the meeting. Herb welcomed the members. Nina took roll call and a quorum was met.

**Approval of February Meeting Minutes**

The meeting minutes were approved subject to the following changes, Harlan said he would get the "Talking Points" templates and outreach email letters out to Rick and Charnia and Judi noted that Issue 558, should be corrected to Issue 5583.

**Outreach Corner**

- Harlan spoke about having lunch with about six people who used to work with him at the Waikiki Yacht Club, where he presented information about TAP.
- Karla noticed that on the outreach report there was a mistake, said she would send Kymberly an email with the correction.
- Herb mentioned attending an outreach event in the Boise, ID area later in the month which should present a good forum for outreach. He will be there with the local Taxpayer Advocate.
- Rick spoke about a presentation he would be doing to a group of Internal Auditors where he would use the power point presentation. Rick also mentioned an outreach event he attended in February where he was able to speak with several government officials.
- Harlan said he did a presentation to the Lacey Rotary Club.



- Judi asked the committee which outreach report they preferred and the summary report will be used for future meetings.
- Joan said she will be doing a TV interview on a local channel.

#### **Citizen Input**

None.

#### **Miscellaneous Subcommittee Report- Nancy Eik**

Nancy provided an update on the following issues;

- **Issue 4395-Expanding Definition of Immediate Family**—the subcommittee discussed this issue and recommend closing the issue as accepted.

**DECISION: The committee agreed the recommendation to close the issue as accepted.**

- **Issue 5568-Brochure for Tax situations involving the Elderly**— the subcommittee discussed this issue and have decided to go back to IRS, requesting that they take a second look at the issue and their response.
- **Issue 4327-Penalties-Timely sent forms 1099 & W-2**—the subcommittee discussed this issue and decided to close and drop the issue.

**DECISION: The committee agreed to the recommendation to drop the issue.**

#### **Taxpayer Burden Subcommittee Report- Rick Holland**

Rick provided an update on the following issues;

- **Issue 5223-Offer in Compromise (OIC) Appeal**—the subcommittee discussed this issue and requested a meeting with an IRS employee who works in the OIC area. In anticipation of a meeting the subcommittee has developed a list of questions that they would like to have addressed. Herb stated OIC was mentioned by Nina Olson at the Denver Town Hall.
- **Issue 5841-IRS Envelopes are too small for additional documentation**—the subcommittee discussed this issue and will be asking for more information.

#### **IRS Services Subcommittee Report- Harlan Barnett**

Harlan provided an update on the following issues;

- **Issue 4389-CP 2000-Unable to Reach an Employee**—the subcommittee discussed this issue and recommend closing this issue due to the following reasons: High level of attention by numerous people, Treasury Inspector General for Tax Administration (TIGTA) and National Taxpayer Advocate's (NTA) Report in Years 2007 and 2009.

**DECISION: The committee agreed to the recommendation to drop this issue.**

- **Issue 5587-Practitioner Hotline – Can't Answer Questions and Long Wait**— the subcommittee discussed this issue and are waiting for research on call site employees training.
- **Issue 5571-Changes Fixed - Not Really Fixed**—the subcommittee discussed this issue and requested the section of the IRM that requires an employee to write up a notes after each phone call.
- **Issue 5163-Contacting A Revenue Officer**—the subcommittee discussed this issue and the staff will follow up to find out if the IRM has been changed to reflect the recommendation.



**Joint Committee Business-Herb Bohrer**

Herb reported that Shawn Collins is now the permanent TAP Director. Herb asked the members to provide any to photos from the 2009 Annual Meeting face to face meetings. The photos will be used in the 2009 TAP Annual Report.

**Face-to-Face Meeting-Judi Nicholas**

Judi requested the subcommittees use time in their next meetings to develop agendas for the face to face meetings Judi also mentioned that the New Issue Screening Committee would be reviewing the new issues. The subcommittee will see their new issues at their upcoming meetings.

**Town Hall Meeting-Herb Bohrer**

Herb said during the Denver Town Hall someone raised the issue about how the IRS had reorganized itself and the problems it has caused. Herb would like the committee to have a discussion about this topic at the face to face. Theresa suggested that the committee be provided with information about the IRS organizational structure prior to the reorganization. Nancy mentioned that she was on the design team that worked on the reorganization and she has documents that describe the former organization. Judi requested that she send the documents to the staff so that it could be copied and sent to the committee.

**Member Comments/Other Business-Herb Bohrer**

Herb stated that Lea Kear resigned from TAP because of job obligations. An alternate, Beverly Phillips has been selected. Beverly has a conflict with the monthly Area 6 conference call. Judi will email the members with an alternate date and time and seek consensus on a new date and time.

Judi mentioned the Nationwide Tax Forums; TAP will be able to staff all six of the forums. Area 6 will attend the forms in Las Vegas, NV and San Diego, CA. Judi will be sending a soliciting member interest attending one or both of the forums.

Judi stated that she is hoping to interview soon to fill the one vacant analyst position.

Herb asked Judi to give an update on recruiting. Judi gave a brief update on number of applications for the different states. An email will be sent out soon to all the persons who have a draft application reminding them about their application prior to deadline.

**Recap Action Items and Timeframes-Nina Pang**

Nina listed the following as being the action items:

- March minutes were approved with corrections made.
- Issue 4389 and Issue 4327 were both dropped and Issue 4395 was closed as accepted.

**Closing-Designated Federal Official-Teresa Thompson**

Teresa Thompson closed the meeting



**Taxpayer Advocacy Panel  
Area 6 Committee  
Meeting Minutes  
March 2, 2010**

**Designated Federal Official**

Teresa Thompson

**Attendance**

Kirsten Ball  
Harlan Barnett  
Eileen Birge  
Herb Bohrer  
Dean Conder  
Nancy Eik  
Joan Gustafson  
Richard Holland  
Lea Kear  
Charnia Parrish  
Chris Paustian  
Karla Toomer

**Staff**

Janice Spinks, TAP Analyst  
Nina Pang, TAP Analyst  
Kymberly Axtell, TAP Secretary

**Guest**

None.

**Absent:**

Judi Nicholas, TAP Program Manager

**Opening/Welcome/Announcements**

Teresa Thompson opened the meeting. It was indicated that Herb would be late in attending the call. In his absence, Nancy served as chair and welcomed the members. Kymberly took roll and a quorum was met.

**Approval of February Meeting Minutes**

The meeting minutes were approved as submitted.

**Outreach Corner**

- Nancy asked Harlan to send Rick and Charnia his Outreach "Talking Points" templates and outreach email letters. Nancy commended Harlan on the great job he has done to condense everything down to what people want and need to know.
- Chris stated the Communications Committee is creating a database to track electronic outreach. It will work something like face book pages and other websites.
- Nancy talked about joining the Missoula Business Women' Network. The network holds a luncheon every month and she will be speaking on TAP and hand out brochures.
- Harlan stated he will have a meeting with the head of the Lacy Rotary to arrange a time for a TAP presentation for about 80 people.



- Kirsten indicated she participated in a Financial Fitness Fair with West Valley City. She shared a booth with TAS; there were about 120 people in attendance. She suggested getting in touch with the local community action office to see if they were doing any outreach events in the local area that other members could attend.
- Herb spoke about the VITA event that he attended in Idaho Falls. While he was not able to spend a lot of time talking about TAP (due to the volunteers being extremely busy), he was able to leave business cards and brochures.

### **Citizen Input**

None.

### **Miscellaneous Subcommittee Report- Nancy Eik**

Nancy provided an update on the following issues;

- **Issue 4395-Expanding Definition of Immediate Family**—the subcommittee received an update on the issue after their last meeting and they will be discussing it further.
- **Issue 5568-Brochure for Tax situations involving the Elderly**— The subcommittee has not heard anything back on this issue; they will continue to pursue this once the information is received
- **Issue 4327-Penalties-Timely sent forms 1099 & W-2**—the subcommittee received information from Marisa regarding this issue and will be discussing the response at their next meeting.

Eileen Birge added that IRS has better instructions when filling out a request for a substitute W-2.

### **Taxpayer Burden Subcommittee Report- Rick Holland**

Rick provided an update on the following issues;

- **Issue 5223-Offer in Compromise (OIC) Appeal**—The subcommittee discussed this issue and requested research as to whether the IRS has a timeline or guidelines for response times once an OIC appeal is filed
- **Issue 5841-IRS Envelopes are too small for additional documentation**—The subcommittee discussed this issue and will be making a recommendation to enclose a label in place of envelopes so that the taxpayer is able to choose the size envelope suitable for the amount of documentation being sent back to the IRS.

### **IRS Services Subcommittee Report- Harlan Barnett**

Harlan provided an update on the following issues:

- **Issue 4389-CP 2000-Unable to Reach an Employee**—This issue ties in with the Practitioner Hotline issue and a lot of research has been done...it is ranked as the number one Most Serious Problem in Nina Olson's report to congress. The subcommittee is wondering if there is anything else that can be added to make a point since it has gained so much attention...they will discuss this further and make a decision at their next meeting
- **Issue 5587-Practitioner Hotline**— The subcommittee received a response back from James Hanness stating the IRS did not have any way of telling who was calling via cell phone or land line...the subcommittee will be making a decision about this issue at their next meeting

### **New Issue Screening Committee**

Nancy reported that a screening committee (comprised of the Subcommittee Leads) met to review the remaining new issues from the Annual Meeting. Following is a summary of the issues and the decisions made on each:



- **Issue 5583**-EFTPS-No way to make Non-Monetary Changes—enrolled agent would like the ability to make non-monetary changes to applications using EFTPS.

**DECISION: This issue was reviewed and by consensus the subcommittee decided to keep for further review.**

- **Issue 5584**-LLC-Not Enough Guidance—enrolled agent would like the IRS to provide more guidance on LLC taxation and expand the requirements for filing Form 1065.

**DECISION: This issue was reviewed and by consensus the subcommittee decided to drop this issue because the instructions are adequate.**

- **Issue 5588**-E-file Profile-Each Business Required to List Forms Filed—the IRS requires each E-file profile for a business/organization to list each form that will be filed for each company.

**DECISION: This issue was reviewed and by consensus the subcommittee to keep for further review.**

- **Issue 5617**-Refund-Processing timeframe is unreasonable—IRS' time frame for processing refunds is unreasonable.

**DECISION: This issue was reviewed and by consensus the subcommittee decided to drop the issue because the current refund process works.**

- **Issue 5632**-Where's my refund? Web link—practitioner indicates he would like to see IRS upgrade the "Where is my refund" link to include 1040X refund return information also.

**DECISION: This issue was reviewed and by consensus the subcommittee decided to drop because the 1040X returns are not e-filed and there is no way to update the website to handle this.**

- **Issue 5645**-Foreign Tax Issues on the Toll-Free IRS Line—issue does not answer questions on foreign tax issues.

**DECISION: This issue was reviewed and by consensus the subcommittee decided to drop this issue because it is beyond TAP's scope.**

- **Issue 5652**-On line Calculator for Basis Calculations—IRS web site does not include an online basis calculator for basis calculations.

**DECISION: The issue was reviewed and by consensus the subcommittee decided to drop the issue because there is not enough information provided to determine what kind of basis calculator.**

- **Issue 5670**-Toll-Free Employees give info without citing References—1040 line employees give info without citing references or where they found the info.

**DECISION: This issue was reviewed and by consensus the subcommittee decided to drop because call site and TAC employees are required to site their references. This could be an isolated case.**



- **Issue 5684**-Limit Income when Filing with AARP or VITA—enforce limit of income for elderly when filing with AARP or VITA.

**DECISION: The issue was reviewed and by consensus the subcommittee decided to drop the issue because the IRS does not jurisdiction over issue, it would be up to the individual cites to enforce this.**

- **Issue 5762**-1040 Instruction Packet-No Master list of Forms and Pubs—no longer a master list of every form and publication in the 1040 instructions packet.

**DECISION: This issue was reviewed and by consensus the subcommittee decided to keep for further review.**

- **Issue 5822**-Notices Do Not Explain Adjustments adequately—Taxpayers and Representatives would be able to review the changes and either agree or disagree and could have answers to IRS questions.

**DECISION: This issue was reviewed and by consensus the subcommittee decided to keep for further review.**

- **Issue 5844**-Full SSNs' are being used on all IRS correspondence—IRS sends out letters to taxpayers using their full SSN. **DECISION:** This issue was reviewed and by consensus the subcommittee decided to drop issue because the IRS is already doing this, they only use the last four of the SSN.
- **Issue 5861**-Financially Disabled Term is not Understood by IRS employees—the reasonable cause or similar explanations that may provide an excuse for relief from a penalty for the late filing of a tax return cannot change the time limitations for filing a claim set by law.

**DECISION: This issue was reviewed and by consensus the subcommittee decided to drop the issue because the term seems clear and it is unreasonable to expect employees to be trained on everything.**

- **Issue 5865**-CAF Unit not uploading info submitted by POA—the CAF unit is not updating information submitted by the POA's.

**DECISION: This issue was reviewed and by consensus the subcommittee decided to combine this issue with issue 5871 and 4512, which are similar issues and will be kept for further review.**

- **Issue 5866**-No State information on withholding on IRS transcript—there is no state information or withholding on IRS transcripts.

**DECISION: This issue was reviewed and by consensus the subcommittee decided to keep for further review.**

- **Issue 5869**-Form 863-Changes no way to contact IRS for assistance—E-file information cannot be changed on Form 8633 and the taxpayer does not have any IRS contact information for assistance.

**DECISION: This issue was reviewed and by consensus the subcommittee decided to drop the issue because when entities are changed a new EIN/EFIN must be obtained.**





- **Issue 5924**-Form 9465 Installment Agreement Form—leads taxpayer to believe he/she is giving all information they need to make an electronic payment to authorize IRS to go into their bank account to collect payment.

**DECISION: This issue was reviewed and by consensus to keep for further review. The issue will be moved to the Taxpayer Burden Subcommittee.**

**Joint Committee Business-Herb Bohrer**

Herb reported that the committee was given a short run down of the Albuquerque, NM Town Hall and the Quality Review Process. The Joint Committee has asked that Quality Review be done in the areas before issues are elevated to the JC Quality Review....Area 6 has had this in place since last year when Dean Conder put a lot of work into the process.

**Face-to-Face Meeting-Janice Spinks**

Janice reviewed the location, hotel information, dates and time of the Face to Face meeting. The location will be Portland, OR. Janice requested that the leads begin to think about what issues will be worked during the face to face and what research they will need leading up to the meeting. Herb suggested putting an item on the agenda for the April meeting.

**Town Hall Meeting-Herb Bohrer**

Herb notified everyone who will be going to the Denver Town Hall on March 18th and reminded them about the conference call being held on March 04, 2010.

**Member Comments/Other Business-Herb Bohrer**

Kirsten asked everyone to look over the Tax Calendar and email her with any suggestions. Herb indicated he is planning a visit to the Ogden TAC and asked if anyone would be interested in going with him. Kirsten and Karla both volunteered to join him.

Herb gave a brief overview of the Albuquerque, NM Town Hall describing who attended and what was discussed. He stated that the attendance wasn't the best but overall it was a good experience.

**Recap Action Items and Timeframes-Nina Pang**

Nina listed the following as being the action items:

- February Minutes Approved
- Active Issues were discussed and decided
- Taxpayer Burden Subcommittee requested Issue 5924

**Closing-Designated Federal Official-Teresa Thompson**

Teresa Thompson closed the meeting



**Taxpayer Advocacy Panel  
Area 6 Committee  
Meeting Minutes  
February 2, 2010**

**Designated Federal Official (DFO)**

Janice Spinks, acting DFO

**Attendance**

Harlan Barnett  
Kirsten Ball  
Eileen Birge  
Herb Bohrer, Chair  
Nancy Eik, Vice-chair  
Joan Gustafson  
Rick Holland  
Charnia Parrish  
Chris Paustian  
Karla Toomer

**Absent**

Dean Conder  
Lea Kear

**Staff**

Kymerly Axtell, TAP Secretary  
Nina Pang, TAP Analyst  
Janice Spinks, TAP Analyst

**Staff Absent**

Teresa Thompson, DFO  
Judi Nicholas, TAP Program Manager

**Opening – Designated Federal Official**

Janice Spinks opened the meeting.

**Roll Call**

Nina took roll and a quorum was met.

**Welcome/Announcements/Review Agenda**

Herb welcomed the members and reviewed the agenda. Janice informed the Committee that Judi and Teresa were attending a conference and she would be the acting DFO. Janice introduced the Seattle office's new secretary, Kymerly Axtell. Members were advised to expect transition of administrative duties in the near future.

**Citizen Input**

There was no citizen input.

**Approval of December and January Meeting Minutes**

The committee reviewed the December meeting minutes.

**DECISION: The committee approved the meeting minutes from the December meeting as submitted.**



The committee reviewed the January meeting minutes.

**DECISION: The committee approved the meeting minutes from the January meeting as submitted.**

#### **Outreach Corner**

Eileen shared that she had a series of successful outreach events. She had connected with her local Asset Building Coalition.

#### **IRS Services Subcommittee Report**

Harlan updated the committee on the IRS Services Subcommittee's issues.

- **#4389 (CP 2000 – Unable to Reach an Employee)** – This is one of the subcommittee's active issues. This pertains to the IRS CP 2000 phone line. This issue has been combined with their next active issue, #5587. Both pertain to the IRS phone system. The subcommittee received a lot of information pertaining to the phone system problem. Harlan will consolidate all of the information the subcommittee has received. The subcommittee hopes to make a decision at their next meeting.
- **#5587 (Practitioner Hotline – Can't Answer Questions and Long Wait)** This issue pertains to the Practitioner Hotline, the employees who staff that line are not able to answer specific tax questions and the wait times are long.

#### **Miscellaneous Subcommittee Report**

Nancy updated the committee on the Miscellaneous Subcommittee's issues.

- **#4395 (Grandparents / Grandchildren Added to the Definition of Immediate Family)** – Nancy prepared a rebuttal to the IRS's response and forwarded this to TAP staff. The IRS said they would add an example in the instructions and the IRS manual. However, the subcommittee recommended the Internal Revenue Manual (IRM) be changed, with the added definition, opposed to just adding an example. Judi currently has the rebuttal.

**ACTION ITEM: Janice will follow-up with Judi on this issue.**

- **#5568 (Brochure for Tax Situations Involving the Elderly)** – Nancy sent an email to Judi, looking for a response from the Forms and Pubs analyst.
- **#4327 (Penalties – Timely Sent Forms 1099 & W-2)** – The subcommittee is waiting for research, which is being completed by TAP analyst Marisa Knispel.

#### **Taxpayer Burden Subcommittee Report**

Rick updated the committee on the Taxpayer Burden Subcommittee's issues.

- **#5223 (Offer in Compromise Appeal – No Decision By the IRS)** – The subcommittee has a lot of research on the Offer In Compromise subject. They are still working on how they want to pursue this issue. They will be looking at how to narrow the scope of this issue.
- **#5280 (5280 (Wording of Letter 525 (Rev. 9/2008))** – The subcommittee reviewed and discussed the IRS response. Based on the response, they recommended this issue be closed, partially accepted.

**DECISION: Area 6 agreed with the subcommittee's recommendation.**

#### **Joint Committee (JC) Business – Herb provided the following information from the JC:**

- The 2010 Annual Meeting would be held the week of December 5th.



- The Joint Committee is working on an issue tracking system so issues sent forward to the IRS can be tracked by TAP.
- Some members are concerned about the need for a strategic plan within the TAP. The plan would potentially call for all members retiring after a three year term... A subcommittee has been formed to work on a strategic plan for TAP.
- Recruitment will start March 15th and go through April 30th. If any member knows of anyone who is interested, they should watch for the announcement, which is due to come out within the next few weeks.
- The Joint Committee is in the process of finalizing the quality review process. Harlan is Area 6's representative and hopes to be able to report on the status at the next Area 6 meeting.

### **Recap Action Items and Timeframes**

Nina recapped the action items.

Janice will follow-up on issue #4395 with Judi and she will follow-up on issue #5568 with the Forms and Pubs analyst.

### **Town Hall Meeting**

Janice reported that the date for the Denver Town Hall Meeting has been changed. The date has been changed to March 18, 2010. Janice thanked the members for responding as to whether or not they could participate based on the date change. Janice will forward the list to Judi.

The Albuquerque Town Hall Meeting will be held February 16th. Shawn, Judi, Janice, and Nina will attend in addition to employees from the Albuquerque Local Taxpayer Advocate's office. TAP members attending will be Charnia Parrish, Herb Bohrer and Harlan Barnett.

TAP staff will keep the Area 6 members updated on any Town Hall details.

### **Member Comments**

Kirsten is working on an IRS calendar project for her SBSE Issue Committee. She asked if panel members could look at the calendar online and offer her any comments. She also asked if any panel members knew of any small business owners who would be willing to provide input on the calendar. If anyone has time or knows of a small business owner, please email Kirsten.

**ACTION ITEM: Nina will send the IRS Calendar link to Area 6 members.**

Janice will schedule a meeting with all the subcommittee leads to screen the remaining issues which were not reviewed at the annual meeting. TAP staff is in the process of updating all the issues to the new SAMS database.

Rick asked how soon they will know where the Area 6 Face-to-Face meeting will be held. Janice did not know how far along the TAP staff was with the process. It is anticipated that staff will have an update during the next meeting.

### **Closing – Designated Federal Official**

Janice thanked everyone and closed the meeting.