

## **2011 Meeting Minutes Area 6**

- September 7, 2011
  - August 3, 2011
  - July 6, 2011
  - June 1, 2011
  - May 4, 2011
  - April 6, 2011
  - March 2, 2011
  - February 2, 2011
  - January 5, 2011
- 

### **Taxpayer Advocacy Panel Area 6 Committee Meeting Minutes September 7, 2011**

#### **Designated Federal Official**

Teresa Thompson

#### **Attendance**

Kirsten Ball  
Harlan (Doc) Barnett  
Colleen Hitchcock  
Richard (Rick) Holland, Vice-Chair  
Edith Kendall (in part)  
Anne Rasmussen, Chair  
Toni Smith (in part)  
Karla Toomer (in part)  
Cindi Williams

#### **Absent**

Herbert (Herb) Bohrer  
Nancy Eik

#### **Staff**

Tim Shepard, TAP Program Analyst  
Nina Pang, TAP Analyst  
Kymberly Hand, TAP Secretary

### **Opening/Welcome/Announcements**

Teresa opened the meeting. Anne welcomed everyone. Tim announced that Linda Rivera and Herb will not be on the call. Kymberly took roll and quorum was not met at that time, but was met as the meeting progressed.

### **Citizen Input**

None

### **Outreach Reports**

Anne asked for volunteers to speak on outreach. She did not know who had not spoken yet.

**Action Item:** Tim will check to see which Area 6 members have not spoken on outreach.

Kirsten, Anne, Harlan and Karla shared their outreach experiences. Kirsten recommended becoming involved or attending various events including EITC Day and the congressional liaison meetings where she was able to make contacts which led to additional outreach events. Anne sent out copies of the TAP Annual Report for a speech and received feedback that the report should not be printed on glossy paper. Harlan gave a preview of the presentation he will give during the TAP Annual Meeting. Karla informed that as she traveled around her state, she would post her business cards on bulletin boards.

### **Approval of August Meeting Minutes**

Later in the meeting, when quorum was met, the minutes were approved by consensus, as written.

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

Anne asked Rick to lead the October meeting and he accepted. Anne did not know if there will be a November meeting. She was working on whether there would be enough on the agenda. She will update everyone once she knows. Teresa mentioned that she will not be able to attend the November meeting.

**Action Item:** Rick will lead the October Area 6 meeting.

Anne reminded members that if they were interested in National TAP Chair and Vice-chair positions, all nominations must be in by Friday.

Tim mentioned that there will be an issue screening committee meeting sometime in September, look for his email. Karla volunteered to replace Beverly on the issue screening committee.

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

There were no action items to recap.

### **Closing**

Teresa closed the meeting.

**Taxpayer Advocacy Panel  
Area 6 Committee  
Meeting Minutes  
August 3, 2011**

**Designated Federal Official**

- Teresa Thompson

**Attendance**

- Kirsten Ball
- Harlan (Doc) Barnett
- Herbert (Herb) Bohrer
- Nancy Eik
- Colleen Hitchcock
- Rick Holland, Vice-Chair
- Anne Rasmussen, Chair
- Toni Smith
- Cindi Williams

**Absent**

- Edith Kendall
- Bradford (Brad) Lee
- Karla Toomer

**Staff**

- Judi Nicholas, TAP Program Manager
- Tim Shepard, TAP Program Analyst
- Nina Pang, TAP Analyst
- Kymberly Hand, TAP Secretary

**Guests**

- Tom Walker, TAP Chair
- John Kim, TAP Vice Chair
- Shawn Collins, TAP Director
- Steve Berkey, TAP Program Analyst
- Trish DeTimmerman, Iowa Local Taxpayer Advocate
- Chasity Schwatz, Nebraska Local Taxpayer Advocate

**Opening/Welcome/Announcements**

Teresa opened the meeting. Anne welcomed everyone. Kymberly took roll and quorum was met.

**Citizen Input**

None

### **Approval of July Meeting Minutes**

Minutes were approved, by consensus, as written.

### **Outreach Reports**

Anne stated that the outreach report would be beginning at the next call. Those who would be sharing would be Kirsten, Harlan and Karla.

**Action Item:** Send Karla a reminder for sharing her outreach next month.

### **IRS Response for Issue #19286 – Form 2290 – Need Reminder or Verification – Anne Rasmussen**

Anne stated the IRS had come back with a partial acceptance for the issue and Colleen stated she was pleased with the response, however, she had hoped they would have accepted the full issue.

The full committee, by consensus, decided to accept the response from the IRS.

**Action Item:** Tim will update the issue status in SAMS.

### **TAP Restructure**

Tom Walker provided a brief update on the decisions made at the Joint Committee Face to Face meeting. He stated the group had a teleconference with Nina Olson, National Taxpayer Advocate (NTA), where she stated that over the next two years the number of volunteers on TAP would be decreased to 74 members and that the restructure had to happen, but she was letting TAP restructure the new TAP. Tom stated this would allow for each member to have a LTA specifically partnered with that person.

He also stated that the next big discussion was how to restructure TAP and how develop the right way for TAP to run. The JC decided to have every member be on one project committee and each project committee to be staffed by a TAP office. He said a new role would be developed to assist members with outreach and this person would be the Outreach Coordinator, preferably the Vice Chair of the project committee, for each project committee. This person would sit on an Adhoc committee, of all Outreach Coordinators with the lead being the TAP Vice Chair. He stated the TAP Vice Chair role would be to coordinate all outreach for TAP throughout the full year, making suggestions to different areas, arranging for outreach events for EITC day and other items like that.

He said at the Annual meeting, there would be a heavy concentration on outreach and how easy it is to do and how to connect with taxpayers to get issues.

Steve commented that the membership would not get down to the 74 members for about two years because some states had more than one member who still had time left on their membership and the leadership did not want to ask for members to leave early.

Shawn stated the recruiting process would stay the same as far as requesting for members from the states the needed members, however, the amount of members selected would be decreased.

Tom stated in the incident that TAP and IRS could not agree on working a specific project, then what he would like to see is the TAP Director and NTA involved settling the dispute.

Tom said if anyone had any further questions, to please email their area chair, staff or any of the TAP leadership.

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

Tim recapped the following action items:

- Send Karla a reminder for sharing her outreach next month
- Update the issue status in SAMS

### **Member Comments/Other Business – Anne Rasmussen**

Anne announced that Brad Lee would be leaving. Judi stated his resignation from TAP would be effective at the end of August and this was due to taking on a larger role at work and with that he feels he would not have the time to dedicate to TAP.

Judi spoke about her leaving from TAP Program Manager in Seattle and taking a new role as the Senior Commissioner Representative Job. She stated her appreciation of all the members and thanked them for their hard work. She said she would miss everyone and that the job had been her favorite one in her career.

Cindi spoke how important it was to her to ensure that the project committees were diverse with panel members from all over the country to provide more diversity throughout the TAP. She said she didn't want to see the staff group panel members together based where they located just to save money.

Anne commented that Cindi should put her concerns in an email. Judi also commented on this and stated that the cost that would be saved by just having one committee travel wouldn't affect how the projects would be developed as far as the members were concerned.

Judi said the Annual Meeting for returning members would be shorter and would start on Tuesday. She said the members would have a more time with their project committees to get a better understanding of what they were expected to do the following year.

Tim stated the Joint Committee would be screening the new issues beginning in November and before that the Areas would be screening the issues. He stated that at the moment there wasn't that many issues, but he suggested that in September to get the screening committee together. He stated he would send out an email when there were some issues that needed to be screened.



Judi explained that the reasoning was to prevent the new JC screening committee from feeling overwhelmed at their first time screening the issues and to provide the areas with some meaningful work since the meetings were already on the Federal Register.

**Closing**

Teresa closed the meeting.

**Taxpayer Advocacy Panel  
Area 6 Committee  
Meeting Minutes  
July 6, 2011**

**Designated Federal Official**

- Teresa Thompson

**Attendance**

- Kirsten Ball
- Harlan (Doc) Barnett
- Herbert (Herb) Bohrer
- Colleen Hitchcock
- Edith Kendall
- Bradford (Brad) Lee
- Anne Rasmussen, Chair
- Toni Smith
- Karla Toomer

**Absent**

- Nancy Eik
- Cindi Williams
- Rick Holland, Vice-Chair

**Staff**

- Judi Nicholas, TAP Program Manager
- Nina Pang, TAP Analyst
- Kymberly Hand, TAP Secretary

**Opening/Welcome/Announcements**

Teresa opened the meeting. Anne welcomed everyone. Kymberly took roll and quorum was met.

**Citizen Input**

None

**Approval of June Meeting Minutes**

Minutes were approved as written.

**New and Improved Outreach Corner**

Anne asked this month's volunteers, Brad, Colleen and Edith, to share their outreach experiences for the month of June:

Brad stated that he belonged to several organizations where he has talked about TAP. He also did a formal presentation in front of the Twin Cities Tax preparers group where he got onto the internet and took the group to the TAP website. At the website he showed the group how TAP is organized and examples of some issues TAP elevated.

Colleen stated she had received an email from a friend who had told her son about TAP since he was having tax issues. She feels area weakness is the inability to get issues from her outreach activities. She will be attending the Las Vegas tax forum in August.

Edith stated she uses her VITA for outreach. She attended to the 2011 Practitioner Liaison meeting in Des Moines, IA. During the meeting she talked about the VITA project and some of the issues that Area 6 has been working on.

Judi mentioned that the staff can make copies for outreach events with a large number of attendees. Email the materials to Kymberly along with the quantity and date needed.

Anne suggested the group not have an outreach corner in August because she anticipates focus of that meeting will be the decisions and discussion from the July Joint Committee meeting.

**Decision:** the group decided, by consensus, to not have outreach corner in August and to move the volunteers Kirsten, Karla and Doc to the September agenda.

**Action Item:** Kirsten, Karla and Doc will to share their outreach experiences in the September Area 6 meeting. Their names will be added to the September agenda.

Harlan stated he was leading a breakout group on outreach at the Joint Committee meeting. He requested members send him any comments they had on outreach.

### **Response from the IRS to issue #16844 (Offer in Compromise (OIC) Process Not Disclosed in Writing**

The full committee discussed the response from the IRS.

**Decision:** Area 6 full committee, by consensus, accepted the IRS response to issue #16844. The issues will be closed on the database.

### **TAP Restructure**

Anne stated the Joint Committee meeting will have three breakout groups Project Committee, Outreach, and Issue Buckets. She stated she had three questions she wanted answered during the discussion about the restructure.

1. What does the original charter say about the TAP structure?
2. Who runs TAP, the IRS or members?
3. What is the motive for the change?

Herb feels the objective for the restructure activities have not been clearly defined and with Anne's questions, he feels that she will get the objective defined.



Anne reminded the group if they had any suggestions or comments about the restructure to email her prior to the Joint Committee Face-to-Face.

Harlan also requested members' suggestions, comments or concerns regarding outreach so he can take it to the Joint Committee Face-to-Face breakout group.

### **Recap Action Items and Timeframes—Anne Rasmussen**

Judi recapped the following action items:

- June minutes were approved and they will be posted on the proper website
- Issue #16844 IRS response accepted and database will be updated
- Outreach Corner will be moved to Sept and Harlan, Karla and Kirsten will be the volunteers to share their outreaches.

### **Member Comments/Other Business—Anne Rasmussen**

None

### **Closing**

Teresa closed the meeting.

**Taxpayer Advocacy Panel  
Area 6 Committee  
Meeting Minutes  
June 1, 2011**

**Designated Federal Official**

- Teresa Thompson

**Attendance**

- Kirsten Ball
- Harlan (Doc) Barnett
- Herbert (Herb) Bohrer
- Colleen Hitchcock
- Richard (Rick) Holland, Vice-Chair
- Edith Kendall
- Bradford (Brad) Lee
- Anne Rasmussen, Chair
- Toni Smith
- Cindi Williams

**Absent**

- Nancy Eik
- Karla Toomer

**Staff**

- Judi Nicholas, TAP Program Manager
- Tim Shepard, TAP Analyst
- Nina Pang, TAP Analyst

**Opening/Welcome/Announcements**

Teresa opened the meeting. Nina took roll and quorum was met. Anne welcomed everyone.

**Citizen Input**

None

**Approval of May Meeting Minutes**

Minutes were approved as written.

**New and Improved Outreach Corner**

Anne updated the committee that in this section, assigned members would share their outreach stories, allowing other members to learn from the experience. Anne asked Brad, Colleen and Edith to share their outreach experiences during the July meeting. She would like them to speak for about five minutes each.

**Action Item:** Brad, Colleen and Edith will share their outreach experiences during the July Area 6 meeting. Their names will be added to the July agenda.

Rick shared his outreach efforts. He was invited to the Tax Practitioner Liaison Meeting in Fargo, North Dakota by Stakeholder's Liaison. He also met the new Local Taxpayer Advocate for North Dakota and exchanged contact information. They plan to attend some outreach events together. He also conducted many one-on-ones with various people.

Herb shared his outreach effort throughout his three years. Herb conducted more organized presentations in the beginning which were well received, but people did not want to speak about the tax system and he could not obtain issues from them. He also contacted a local Rotary Club, but they were not interested in his presentation. He also agreed with Rick, that the most effective outreach tools for him, were the one-on-ones and the Tax Practitioner Liaison Meetings and the Congressional Liaison Meetings with the Local Taxpayer Advocate (LTA) and the Small Business Self Employed (SBSE) Liaison. The Milwaukee TAP manager recently referred a New York Times Financial blog writer to Herb and he was interviewed in her blog. Herb believed the most effective was to be ready to speak and share a message on short notice.

Anne also contacted her LTA and found him to be supportive. She also contacted her local Rotary Club, but had a positive experience. She also worked with her local certified public accountant (CPA) society and the Stakeholders Liaison. Anne also "steals" from other members, such as Harlan. She also carries a list of issues TAP had worked. Anne inquired about the Congressional letters which were sent out at the beginning of the year. She mentioned that her local Congressional representatives did not contact her. Judi informed the committee that the letters were developed through an initiative by the Communications Committee. She thought there may be another round of letters going out to the Congressional representatives.

Judi added that she facilitates introductions with the LTAs, usually in January. If anyone needs additional support from their LTA, please contact Judi.

**Action Item:** TAP staff will follow-up with the TAP manager who is oversees the Communications Committee.

**Response from the IRS to issue #17282 (Offer in Compromise (OIC) Appeal, No Decision by the IRS for More Than a Year)**

Cindi provided an update for issue #17282. She reported that the IRS believed this particular case involved in the Appeals process was an anomaly and the IRS did not believe the Letter 4141 needed to be updated to let the taxpayer know the process was lengthy. The committee discussed the IRS decision and decided not to rebut the decision.

**Decision:** Area 6 decided to accept the IRS response to issue #17282, they will close it, proposal rejected.

### **Response from the IRS to issue #17140 (Feedback Section Needed on IRS Website)**

In Nancy's absence, Tim provided background information for issue #17140. Area 6 had recommended the IRS provide more graphics and flowcharts to their website. The IRS thought this recommendation was too broad. They were not accepting or rejecting the issue, but wanted TAP to either re-work the issue or withdraw it. The committee discussed this issue and thought this issue could be a bucket project.

**Decision:** Area 6 will withdraw issue #17140 and place it in the parking lot.

**Action Item:** TAP analyst will contact Russ Pool, the Database Analyst, with Area 6's decision.

### **TAP Restructure**

Anne reported that Tom Walker was putting together information for the panel members regarding the restructure and it should be going out soon. There have not been any new decisions made and if any member has any questions or comments, they should forward them to Tom, Judi or Anne. Anne informed the committee that Harlan has a write-up to present to the Joint Committee (JC). The members of the Taxpayer Burden Subcommittee also planned to submit their comments. The committee discussed this topic and Judi will share with the committee the TAP staff's views and her own suggestion. Judi thought Tom's information would be coming out before the July JC meeting. Judi thought Area 6 could discuss this topic further in their July meeting after they receive all the materials.

**Action Item:** Judi and Harlan will send out the documents which were discussed.

### **SAMS Outreach Analysis**

Tim reported that last month, the Area wanted to know how TAP generated their issues and how they could direct their outreach to obtaining more issues. He is still working on the topic but learned in his research that TAP management was also researching the same topic. Tim will update the Area when he learns more. Judi added that this topic will be discussed TAP-wide as the restructure continues so TAP can direct their resources to the outreach events which generate issues.

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

Tim reported the following Action Items:

- Issue #17282, the Area will accept the IRS' decision
- Issue #17140 will be withdrawn and placed in the parking lot
- TAP restructure comments should be sent to Anne, Tom or Judi
- Judi will send out TAP staff concerns regarding the restructure
- Harlan will send out his comments regarding the restructure
- Area 6 will continue the TAP restructure discussion in July
- Possible conference call during the JC Face-to-face meeting in July
- Brad, Colleen and Edith will discuss their outreach experiences in July
- TAP staff will follow-up on the TAP Congressional letter with Roy Block



**Member Comments/Other Business—Anne Rasmussen**

None

**Closing**

Teresa closed the meeting.

**Taxpayer Advocacy Panel  
Area 6 Committee  
Meeting Minutes  
May 4, 2011**

**Designated Federal Official**

- Teresa Thompson, DFO

**Attendance**

- Kirsten Ball
- Harlan (Doc) Barnett
- Bradford (Brad) Lee
- Herb Bohrer
- Nancy Eik
- Colleen Hitchcock
- Edith Kendal
- Brad Lee
- Toni Smith

**Absent**

- Richard (Rick) Holland, Vice-Chair
- Cindi Williams
- Anne Rasmussen, Chair
- Karla Toomer

**Staff**

- Judi Nicholas, TAP Program Manager
- Tim Shepard, TAP Analyst
- Nina Pang, TAP Analyst
- Kymberly Hand, TAP Secretary

**Opening/Welcome/Announcements**

Teresa Thompson opened the meeting. Kymberly Hand took roll and quorum was met. Judi welcomed everyone and stated that Anne would not be on the call.

Judi announced that Bev Phillips has submitted her resignation from TAP and the vacancy will be filled when the new members report in December.

**Citizen Input**

None

**Approval of April Meeting Minutes**

Minutes were approved as written.

**TAP Restructure Update**

Judi suggested the members discuss the TAP restructure within their subcommittees and raise any comments, suggestions, concerns through Anne and staff.

She also stated that Cindi is drafting comments from her subcommittee raising their concerns. The other subcommittees could follow Cindi's lead by providing what they discuss in written format so staff could consolidate and provide the information to the Joint Committee.

Discussion among members produced the following issues during the meeting:

- No transition plan/Ease of transition
- Shifting from outreach to getting issues from taxpayers
- No end point currently
- Lack of issues

### **Screening Committee**

Nancy provided the following report on the last screening committee meeting:

**Issue #19836 – Third Party Return Prep-Cannot Prepare Two State Returns—**Nancy provided a brief background on the issue and stated the screening committee recommended dropping the issue because Area 3 is working a similar issue.

**Decision:** By consensus, the committee dropped this issue.

**Issue #19968 – Form 1040A-Ability to file Schedule E with it –** Nancy provided a brief background on the issue and stated the screening committee recommended dropping the issue because adding schedules to the Form 1040A would increase the length and add complexity, which goes against its original intent.

**Decision:** By consensus, the committee dropped this issue.

**Action:** A closing letter will be drafted for each issue mailed to the submitter if contact information is available.

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

Colleen provided the following report for Bev Phillips:

#### **Active Issues:**

**Issue #19286 – Form 2290-Need Reminder or Verification –** Colleen provided a brief description of the issue and stated the issue had been elevated to the Joint Committee Quality Review and will be discussed at the next Joint Committee meeting for approval and possible elevation to the IRS.

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

Nancy provided the following report for the subcommittee:

#### **Active Issues:**

**Issue #18512 – Identifying Foster Children as Dependents** – Nancy provided a brief description of the issue and stated the subcommittee recommends placing the issue in the parking lot to gather more information.

**Decision:** By consensus, the committee moved the issue to the parking lot.

**Issue #19612 – Form 1040-Line 36-No fillable Field** – Nancy provided a brief description of the issue. The committee discussed the referral and agreed that the referral would go back to the subcommittee for further work.

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

Nothing to report

### **Outreach Corner**

Members voiced their concerns about their ability to gathering issues from taxpayers at outreach events; often participants do not raise issues. Members stated their need for more individualized outreaches where they could sit down with the taxpayers and have time for them to think about and feel comfortable with talking about potential issues.

At future Area meeting selected members will share their outreach activities, ideas and best practices with the group. The goal is to support each other with ideas, tips and tools.

Several members stated outreach needed to be redesigned to focus on gathering issues not just getting the word out about TAP. They realize that unless they get issues, TAP will have nothing to place in the issue buckets.

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

Tim reported the following Action Items:

Tim will do an analysis of the SAMS Database to what outreach events yielded productive issues.

Tim will email the subcommittees to set up meetings (for those interested) to discuss the restructure of TAP.

### **Drop and prepare closing letters on the following:**

Issue #19968 – Form 1040A – Ability to file Schedule E

Issue #19836—Third Party Return Prep-Cannot Prepare Two State Returns—Combined with Area 3

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

None

### **Closing**

Teresa closed the meeting.



**Taxpayer Advocacy Panel  
Area 6 Committee  
Meeting Minutes  
April 6, 2011**

**Designated Federal Official**

- Teresa Thompson, DFO

**Attendance**

- Kirsten Ball
- Harlan (Doc) Barnett
- Bradford (Brad) Lee
- Herb Bohrer
- Nancy Eik
- Colleen Hitchcock
- Edith Kendal
- Brad Lee
- Anne Rasmussen, Chair
- Toni Smith
- Karla Toomer

**Absent**

- Richard (Rick) Holland, Vice-Chair
- Cindi Williams

**Staff**

- Judi Nicholas, TAP Program Manager
- Tim Shepard, TAP Analyst
- Kimberly Hand, TAP Secretary

**Guest**

- Tom Walker, TAP Chair
- John Kim, TAP Vice Chair
- Steve Berkey, TAP Senior Program Analyst

**Opening/Welcome/Announcements**

Teresa Thompson opened the meeting. Kimberly Hand took roll and quorum was met. Anne Rasmussen welcomed everyone.

**Approval of March Meeting Minutes**

Minutes were approved as written.

### **TAP Restructure**

Tom Walker provided his perspective on the proposed restructure of TAP and answered any questions the committee had. He provided the background on the restructure and stated that all concerns and thoughts needed to be heard so that all things could be addressed. He explained that outreach would become a major part of the area responsibility. He said the Joint Committee would be discussing how the restructure will look at their upcoming meeting to better develop TAP.

He requested any member who had questions, comments or suggestions to please contact John Kim, Steve Berkey, their staff or himself so their concerns, questions or comments could be heard and discussed.

### **Outreach Corner**

Several members complimented Herb Bohrer on his interview in the New York Post blog.

### **Citizen Input**

None

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

Nancy provided the following report for the subcommittee:

#### **Review response:**

Issue #17299—Paper Report Sent in Mail W/O Tracking—Nancy stated the subcommittee accepts the IRS response as written.

#### **Recommend to Drop:**

Issue #19158—Form 1040X-Pre-2009 Easier to Follow—Nancy stated the subcommittee recommends the issue be dropped because the new revision of the 1040X addresses the submitters concerns.

Decision—the full committee, by consensus, dropped the issue and a closing letter will be sent to the taxpayer.

Issue #19566—Collection Process—Never Notified—Nancy stated the subcommittee decided recommends the issue be dropped because the IRS issues multiple notices on balance due accounts.

Decision—the full committee, by consensus, dropped the issue and a closing letter will be sent to the taxpayer.

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

Harlan provided the following report for Bev Phillips:

**Active Issues:**

Issue #19286 Form 2290-Need Reminder or Verification—Harlan reported the subcommittee is preparing a Joint Committee referral for this issue.

Toll-Free Issues—Harlan Barnett reported on the progress of the taskforce on toll free issues. He stated Marianne Ayala is doing a great job with assisting the task group and the taskforce has a teleconference coming up where more information would be provided.

**Taxpayer Burden Subcommittee Report—Tim Shepard**

Tim provided the following report for Cindi Williams:

**Recommend to Drop:**

Issue #17335—Notices Do Not Explain Adjustments Adequately—Tim reported the subcommittee recommends the issue be dropped because the CP12 & CP21E notices were recently updated by the IRS.

Decision—the full committee, by consensus, dropped the issue and a closing letter will be sent to the taxpayer.

Issue #19531—S Corp Returns—Tim reported the subcommittee decided the issue be dropped because it is outside TAP's scope.

Decision—the full committee, by consensus, dropped the issue and Rick will draft a closing letter.

Issue #19561—E-File Want to Include Attachments—Tim reported the subcommittee recommends the issue be dropped because it is an individual issue.

Decision—the full committee, by consensus, dropped the issue and no closing letter will be prepared since there is no contact information for the submitter.

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

Tim reported the following Action Items:

Drop and prepare closing letters on the following:

Issue #19158—Form 1040X-Pre-2009 Easier to Follow

Issue #19566—Collection Process-Never Notified

Issue #17335—Notices Do Not Explain Adjustments Adequately

Issue #19531—S Corp Returns

Drop the following:

Issue #19561—E-File Want to Include Attachments

**Member Comments/Other Business—**

None

**Closing**

Teresa closed the meeting.

**Taxpayer Advocacy Panel  
Area 6 Committee  
Meeting Minutes  
March 2, 2011**

**Designated Federal Official**

- Teresa Thompson, DFO

**Attendance**

- Kirsten Ball
- Harlan (Doc) Barnett
- Bradford (Brad) Lee
- Herb Bohrer (in part)
- Toni Smith
- Colleen Hitchcock
- Cindi Williams
- Richard (Rick) Holland, Vice-Chair
- Edith Kendal
- Beverly (Bev) Phillips
- Karla Toomer
- Anne Rasmussen, Chair

**Absent**

- Nancy Eik

**Staff**

- Judi Nicholas, TAP Program Manager
- Tim Shepard, TAP Analyst
- Nina Pang, TAP Analyst
- Kymberly Hand, TAP Secretary

**Guest**

- Allison Moore, Weber-Shandwick
- Howard Brooks, Taxpayer Advocate Service (TAS) C&L

**Opening/Welcome/Announcements**

- Teresa Thompson opened the meeting. Kymberly Hand took roll and quorum was met. Anne Rasmussen welcomed everyone.

**Approval of February Meeting Minutes**

- Minutes were approved as written.

**Outreach Corner**

There was a brief discussion about whether the information on the outreach report represented the entire month. After some discussion about the due date for reporting outreach and the timing of the monthly meeting, it was agreed that the staff would provide additional direction for reporting outreach.

Anne reminded panel members that outreach is a source of new issues and it is important that all members do outreach.

### **Citizen Input**

None

### **Responding to feedback to closed Issue #18571—S Corp Healthcare Deduction— Anne Rasmussen**

Anne explained the submitter has raised several issues to TAP and the submitter is growing increasingly discontented with TAP because the committee has dropped a number of his issues.

- Anne stated she would call the submitter to discuss his concerns. Members suggested that she consider the following: Have him call in on committee teleconferences
- Discuss how he could refine his issues
- Suggest he consider applying to become a member of TAP

### **IRS Services Subcommittee Report—Bev Phillips**

Bev provided the following report:

#### **Active Issues:**

**Toll-Free Issues**—Harlan stated that the Joint Committee is interested in forming a task force to address the large number of toll-free issues in TAP. Harlan and Herb have developed a proposal which has been forwarded to the TAP leadership for approval.

**Issue #19565—Toll-free-Cannot Speak with Same Assistor**—Harlan stated that this issue would be included the taskforce dealing with toll-free issues.

**Issue #19617—Notice of Federal Lien**—Harlan stated the subcommittee would begin working on this issue.

#### **Recommend to Drop:**

**Issue #19157—Form 1099-Div Short Term Capital Gain Distribution (add a box to 1099-Div for short term gain)**—Harlan provided a brief background on the issue, stating the subcommittee recommends to the issue be dropped because it would require a legislative change which is outside TAP's scope.

Staff stated subcommittee would receive latest IRS regulations dealing with Capital Gains.

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

### **Taxpayer Burden Subcommittee Report—Cindi Williams**

Cindi provided the following report for the subcommittee:

**Active Issues:**

Issue #16844 – OIC More Info Needed—Cindi stated the subcommittee drafted the issue referral form.

The committee members provided a few editorial changes to the referral form. The referral must go through Area 6 Quality Review before elevation to the Joint Committee.

Issue #17282 – Appeals Process Unreasonably Slow—Cindi stated the subcommittee has received new information about this issue which they will review at their next meeting.

Issue #18121 – Qualified Dividends and Capital Gains—Cindi stated the IRS implemented the change without a formal referral. The subcommittee recommends that the Area 6 annual report include this issue as an example of Area 6 work.

**Recommend to Drop:**

**Issue #19444 – Communication-Tax Law Changes Not Available** – Cindi provided a brief background on the issue, stating the subcommittee recommends dropping the issue; it would require a legislative change which is outside TAP's scope.

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

**Issue #19620 – Form 1040-Purchase Power Amount** – Cindi provided a brief background on the issue, stating the subcommittee's recommends dropping the issue because the purpose of the Form 1040 is to report income and deductions not purchase power of income.

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

**Miscellaneous Subcommittee Report – Anne Rasmussen**

Anne provided the following report on behalf of Nancy Eik:

Review response to Issue # 17299 – Paper Report Sent in Mail W/O tracking – this will be discussed at the next subcommittee.

**Recommend to Drop:**

**Issue #18570 – IRS Website Search Engine** – Anne provided a brief background on the issue, stating the subcommittee recommends the issue be dropped because of the broad vague nature. Additionally, the IRS is currently undertaking a sweeping redesign of the website.

**Decision** – the full committee, by consensus, dropped the issue, and will monitor the website to see if the upcoming changes make it better.

**Issue #19300 – Provide Number/Website to Collect Returned Refunds** – Anne provided a brief background on the issue, stating the subcommittee recommended to the issue be dropped because the IRS cannot direct newspapers to post information.

**Decision**—the full committee, by consensus, dropped the issue. The committee suggested the subcommittee consider creating a new issue on informing taxpayer about uncollected refunds.

**Parking Lot “Parking Meter”—Cindi Williams**

Cindi suggested creating a “parking meter” for parking lot issues. The idea is that issues would be in the parking lot for a finite period of time and then either worked or dropped. After some discussion the member’s of Cindi’s subcommittee (Rick and Karla) will discuss the comments and bring a refined proposal to the March call.

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

Tim reported the following Action Items:

Add agenda item to Taxpayer Burden Subcommittee to discuss parking meter suggestion.

Drop the following issues and prepare closing letters:

Issue #19620—Form 1040-Purchase Power Amount

Issue #19444—Communication-Tax Law Changes Not Available

Issue #19157—Form 1099-Div Short Term Capital Gain Distribution

Issue #18570—IRS Website Search Engine

Issue #19300—Provide Number/Website to Collect Returned Refunds—

Staff to send out an email requesting feedback about Glance technology used during the call today

Anne would contact submitter of several Area 6 issues.

Issue #16844—OIC More Info needed—will go to Area 6 Quality Review after a few editorial corrections

**Update on Face to Face – Judi Nicholas**

Judi stated that the final location for the Face to Face has not been finalized because the government is still operating under a continuing resolution and TAP does not have a final budget for 2011.

**Member Comments/Other Business**

None

**Closing**

Teresa closed the meeting.

**Taxpayer Advocacy Panel  
Area 6 Committee  
Meeting Minutes  
February 2, 2011**

**Designated Federal Official**

- Teresa Thompson, DFO

**Attendance**

- Kirsten Ball
- Harlan (Doc) Barnett
- Bradford (Brad) Lee
- Herb Bohrer
- Toni Smith
- Cindi Williams
- Richard (Rick) Holland – Vice-chair
- Edith Kendal
- Beverly (Bev) Phillips
- Karla Toomer
- Anne Rasmussen – Chair
- Colleen Hitchcock

**Absent**

- Nancy Eik

**Staff**

- Janice Spinks, TAP Analyst
- Tim Shepard, TAP Analyst
- Nina Pang, TAP Analyst

**Guest**

- Trish DeTimmerman, Iowa Local Taxpayer Advocate (LTA)
- Doris Hynes, Treasury Inspector General for Tax Administration (TIGTA)

**Opening/Welcome/Announcements**

Teresa Thompson opened the meeting. Nina Pang took roll and quorum was met. Anne Rasmussen welcomed everyone.

Anne Rasmussen introduced Trish DeTimmerman as the LTA for the state of Iowa. She also introduced Doris Hynes of the TIGTA office, who was interested in hearing the kinds of issues TAP addresses.



Anne provided highlights from the January Joint Committee call. She reported that Cindi Williams presented Issue #17282 which was split into two referrals. The Joint Committee requested the referrals be combined and brought back to the February meeting. Anne thanked Cindi for attending the call and assisting with the issue.

Anne reminded the committee to register in TAPSpace and sign up for the training classes, if they had not done so yet. Brad Lee mentioned that he will be out of the country most of February and he will not be able to attend either training session. Tim Shepard said the email with the two training sessions had been sent to all TAP members.

### **Approval of December Meeting Minutes**

Minutes were approved as written.

### **Outreach Corner**

Anne reported about a 50% of the area members participated in outreach for January. She reminded members to turn in their outreach report even if it was after the deadline.

### **Citizen Input**

None

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

Rick reported on the following issues:

**Issue 19445—EFTPS Resistance**—Rick provided a brief background on the issue, stating the technology is mandated by the Department of Treasury and recommended dropping the issue. The submitter will be notified of the committee's decision to drop the issue.

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

**Issue 19493—S Corp from Puerto Rico not Recommended by IRS**—Rick provided a brief background on the issue, stating the issue is legislative and recommended dropping it. . The submitter will be notified of the committee's decision to drop the issue.

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

**Issue 19538—Return Processing**—Rick provided a brief background on the issue, stating it is outside TAP's scope and recommended dropping the issue. The submitter will be notified of the committee's decision to drop the issue.

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

**Action Item:** Tim Shepard to email the research report for Issue #19565 to Doc Barnett.

### **Taxpayer Burden Subcommittee Report—Cindi Williams**

Cindi reported on the following issues:

**Active Issues:**

**Issue #16844—OIC More Info Needed**—Cindi provided a brief background, stating the subcommittee will be writing a referral to be reviewed by the committee upon completion.

**Issue #17335—Notices Do Not Explain Adjustments**—Cindi provided a brief background stating the subcommittee is gathering more research and will be reviewing at their next meeting.

**Issue #18121—Qualified Dividends and Capital Gains—Referral**—Cindi stated Rick is finishing the referral and the IRS has stated they will make the changes and will accept the recommendation by TAP. She stated there was no contact information for the submitter.

**Recommendation to Drop:**

**Issue #16683—Net Operating Carryback Loss**—Cindi provided a brief background, stating issue is legislative and recommended dropping it.

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

**Issue #17337—State Information on Withholding on IRS Transcripts**—Cindi provided a brief background, stating issue is being addressed in Issue #16727 and recommended dropping it.

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

**Action Item:** Tim will send a closing letter to the submitter.

**Issue #18571—IRS Representatives Need to Speak English Well**—Cindi provided a brief background, stating the issue is not systemic and recommended dropping it.

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

**Miscellaneous Subcommittee Report—Toni Smith**

Toni reported on the following issues:

**Active Issues:**

**Issue #118512—Identifying Foster Children as Dependents**—Toni provided a brief background, stating the subcommittee is working on the referral and wants the full committee's feedback on the issue. The subcommittee will edit the referral incorporating the committee's comments and present the edited version at the March committee meeting.

**Issue #18570—IRS Website Search Engine**—Toni provided a brief background and stated more research is being gathered and the issue will be discussed during their February meeting.

**Recommendation to Drop:**

**Issue 18571—S Corp Healthcare Deduction**—Toni provided a brief background, stating the information is already available and recommended dropping it.

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

**Issue #19159—Box Needed to Show Where Tax Computed**—Toni provided a brief background, stating the information is already available and recommended dropping the issue.

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

### **IRS Services Subcommittee Report—Bev Phillips**

Bev reported on the following issues:

#### **Active Issues:**

**Issue #16689—Underreporter Notice CP 2000 Needs Clarification (part one of this issue to be put in parking lot. Part two will be included in Toll Free Issues)**—Bev provided a brief background, stating part of the issue is on hold until the form is available and the second part will be included in the toll free issues.

**Issue #17659—IRS Email Communication with Taxpayers and Practitioners**—Bev provided a brief background and states the subcommittee will monitor the issue being submitted by Area 7.

**Issue #19157—Form 1099-Div Short Term Capital Gain Distribution**—Bev provided a brief background, stating the subcommittee is waiting on more information from the taxpayer and will be discussing at the issue at their February meeting.

#### **Review IRS Response:**

**Issue #17280—Practitioners Want a List of POA's**—Bev provided a brief background, stating the IRS accepted the referral with a follow up date of 5/16/2011.

#### **Rebuttal to IRS Response:**

**Issue 17325—Changes Fixed-Not Really Fixed**—Bev provided a brief background, stating the IRS rejected the referral and the subcommittee will prepare a rebuttal.

**Decision**—the full committee, by consensus, approved rebutting the IRS's reason for rejecting the recommendation(s).

#### **Toll Free Issues:**

Harlan and Herb reported the subcommittee was gathering toll-free issues from all areas of TAP to report to the IRS as a most reported issue. The subcommittee was asked to recap all of the toll free issues in Area 6. They are working out the details of the next step.

### **Parking Lot “Parking Meter”—Cindi Williams**

Cindi will describe her idea in writing and it will be discussed at the March meeting.

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

Tim reported the following Action Items:

Tim will update the database with all issues to be dropped.



**Member Comments/Other Business—**

Doris explained that she joined the call to see what types of issues taxpayers were bringing to TAP.

**Closing**

Teresa closed the meeting.

**Taxpayer Advocacy Panel  
Area 6 Committee  
Meeting Minutes  
January 5, 2011**

**Designated Federal Official**

- Teresa Thompson, DFO

**Attendance**

- Kirsten Ball
- Harlan (Doc) Barnett
- Bradford (Brad) Lee
- Herb Bohrer
- Toni Smith
- Nancy Eik (not present)
- Cindi Williams
- Richard (Rick) Holland (Vice-Chair)
- Edith Kendall
- Beverly Phillips
- Karla Toomer (not present)
- Anne Rasmussen (Chair)
- Colleen Hitchcock

**Staff**

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

**Guest**

- Charlotte Kieliszek, Management & Program Analyst, Office of Taxpayer Correspondence
- Myra Simons, Office of Taxpayer Correspondence

**Opening/Welcome/Announcements**

Teresa Thompson opened the meeting. Kymberly Hand took roll and quorum was met. Anne Rasmussen welcomed everyone.

The dates for the face to face have not been decided and an email will go out as soon as dates for the face to face have been decided.

Anne reminded everyone of the new date and time change for all future meetings beginning in February.

### **Approval of December Meeting Minutes**

Minutes were approved as written.

### **Outreach Corner**

Kymberly will email members reporting what she has in the office for outreach material. She will send generic business cards to the new members.

### **Citizen Input**

None

### **Miscellaneous Subcommittee Report—Toni Smith**

Toni reported on the following issues:

#### **Active Issues:**

**Issue #18570—IRS Website Search Engine**—the subcommittee discussed the issue and will put it in the parking lot until more information can be obtained from the submitter.

**Issue #18571—S Corp Healthcare Deduction**—the subcommittee discussed the issue and will put it in the parking lot until more information can be obtained from the submitter.

**Issue #19159—Box Needed to Show Where Tax Computed**—the subcommittee discussed the issue and will place it in the parking lot until the revised form is available at which time they will review the changes.

**Issue #17784—Toll Free Line Problem Solving Referral**—the subcommittee discussed the issue and decided the issue should be moved to the IRS Services subcommittee.

#### **Recommend to Drop:**

**Issue #19069—Cancellation of Debt**—the subcommittee discussed the issue and recommends dropping it because it would require a legislative change.

**Decision**—the full committee, by consensus, dropped the issue and a closing letter will be sent to submitter.

### **IRS Services Subcommittee Report—Bev Phillips**

Bev reported on the following issues:

#### **Active Issues:**

**Issue #16689—Underreporter Notice CP 2000 Needs Clarification**—Charlotte Kieliszek stated that the IRS has redesigned the CP-2000, which is expected to be in production by the fall of 2011. The new form now includes information on how to make payments. She stated the option to pay by Electronic Funds Tax Payment System is not available on the updated form due to the many other payment options available. She also stated that the IRS website will have a landing page for each notice and taxpayers are responding positively with the changes.

#### **Respond to IRS response:**

**Issue #17325 Changes Fixed-Not Really Fixed**—the subcommittee discussed the issue and has asked the IRS to provide program owner information. The subcommittee will also discuss whether to write a rebuttal to the IRS response.

**Decision**—the full committee, by consensus, agreed with the subcommittee request for program owners information and will wait for the subcommittee decision on the rebuttal.

**Toll-Free Issues:**

Bev reported that the following issues will be discussed at their next subcommittee meeting:

**Issue #16876—Toll-Free Line Wait is long for Cell users**

**Issue #18547—Estimated hold time on IRS toll-free**

**Issue #18594—Toll-Free Line Menu**

**Issue #19004—Toll-Free Number-Disconnects or Long Wait**

**Issue #19115—Toll-Free Line-Unable to Speak to IRS Employee**

**Issue #17784—Toll-Free Line Problem Solving Referral**—Issue moved from Miscellaneous Subcommittee

**Taxpayer Burden Subcommittee Report—Cindi Williams**

Cindi reported on the following issues:

**Active Issues:**

**Issue #16844—OIC More information needed**—the subcommittee will be discussing the issue at their next meeting.

Cindi asked Tim to review Note #13478 in the Issue Report to verify that Area 3 is not working the same issue. If Area 3 is then the subcommittee wants to drop the issue. Tim said he would review Note #13478 and get the information to her.

**Issue #18571—IRS Rep must Speak English or use Interpreter**—the subcommittee will be discussing the issue at their next meeting.

**Issue #18121—Qualified Dividends and Capital Gains—Referral by Rick Holland**—the subcommittee will be discussing the issue at their next meeting.

**Issue returned from Joint Committee:**

**Issue #17282—Appeals Process Unreasonably Slow**—Rick Holland reported that the Joint Committee (JC) recommended the issue be split into two different issues and he provide the revised referrals.

**TAPSpace—Tim Shepard**

Tim reported the site is working and there will be training provided to all panel members in February. The dates will follow. He stated that he would continue emailing the agendas and pre-reads to everyone. If any members are having difficulty registering in the new TAPSpace, please email Tim so the problems can be reported to the vendor.

**Screening Committee—Anne Rasmussen**

The screening committee consists of the subcommittee leads and Rick Holland, who will set up a meeting date and time to review the new issues as needed.



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

Issue #19069—dropped because it requires a legislative change.

Issue #17325—will go back to the IRS to obtain Program Owner’s information.

Issue #17282—send Cindi information on the JC referral for this issue.

Issue #16844—Tim to check on Note #13478, regarding Area 3 issue on OIC information.

Edith locked out of TAPSpace.

Set up Screening Committee call

Kymerly to email the outreach material list out to everyone and will send generic business cards to everyone.

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

Rick stated he would be sending in his Outreach request for December and that he was reimbursed for the Annual meeting.

### **Closing**

Teresa closed the meeting.