

2003 Meeting Minutes Area 7

- November 4, 2003
 - October 4, 2003
 - September 23, 2003
 - August 18, 2003
 - July 21, 2003
 - June 16, 2003
 - May 12, 2003
 - March 7, 2003
 - January 14, 2003
-

Area 7 Committee Meeting Minutes November 4, 2003 Teleconference Noon to 1:30 pm

Attendees:

- Curtis Feese
- Cheyanna Jaffke, Area 7 Chair
- Howard Perkins
- David Robinson
- Charles Taylor
- Laurie Keleman, Designated Federal Official
- Judi Nicholas, TAP Manager
- Mary O'Brien, Program Analyst

Members Not Present:

- Yvonne Gallegos Bodle
- James Griffin
- Chris Lowe

Welcome and Announcements

Cheyanna welcomed everyone to the meeting and asked for a roll call. Mary called roll, six members present; therefore, the quorum requirements were met. Cheyanna reviewed the agenda for today's call.

Approve Minutes

A motion was made to approve the minutes with no changes. By consensus, the minutes were approved.

Discussion of Annual Meeting in Washington DC

Cheyanna gave a brief synopsis of the decisions made during the annual meeting for the members not able to attend.



Quorum

It was decided to change the number of panel members to make up a quorum. By consensus, the quorum requirement will be met with four panel members.

Mission for area 7

- Participate in outreaches to gather issues from the public
- Work on issues received from the public

Outreach Group Goals for the upcoming year

- The committee set a goal to have two group outreaches.
- The committee set the goal to have every panel member visit a walk-in office to observe

Issues: How will the Area 7 committee work new issues?

By consensus it was decided that for each issue, a panel member assigned on an alphabetical rotation will shepherd the issue. This does not mean that the panel member will do all the research on the issue. Mary is available to work with the panel member on research and resources.

Approval Process

The committee decided to do as much business as possible electronically. Agendas, Meeting minutes, Issues, etc. will be sent electronically. An example: The committee will approve agendas by email. The results of any action done electronically will be reported out at the next business meeting. All discussions concerning an issue will be discussed during a meeting. The email will be simply approve or not approve. If there is any not approve votes, the issue will then be discussed again at the next meeting. The committee decided that when asked for a response that it is necessary to reply to all.

Pending Issues

Adult Education

Charles discussed what the progress for the Adult Education. The focus is on education concerning EITC. The subcommittee has been involved with the VITA task force in California . The next meeting for this task force will be on November 17 th . Charles has been working with banks and insurance companies to recruit VITA volunteers for this effort. The idea is to try this locally as a test group and the idea would be to broaden the scope.

Compound /Complex Interest versus Simple Interest

By consensus it was decided to put this issue on hold until Yvonne can participate on the call.

Tax Fraud

By consensus it was decided to put this issue on hold until Jim could participate on the call.

Installment Agreement

Laurie explained that the committee working on this issue would like everyone to look at the IRS interactive website together before writing up a recommendation. Laurie discussed the benefits of doing this when the group could be together. It was decided to work on this issue at the next face-to-face meeting.

New Issues

Although the issue subcommittee did not have a chance to prioritize the new issues, it was decided that since there were only two new issues, the entire panel would work them today.



Issue #2059: Improve the menu system on the toll-free number to make it more user friendly and have the ability to talk to the same person.

Many of the other committees are working on the IRS toll-free assistance number issue. By consensus, it was decided that the Area 7 committee did not want to duplicate efforts and to pass this issue on to the committees working on this issue. Cheyanna will talk to the committee chair about taking this issue. Mary will follow up with the committee analysts.

Issue #2289: Have the VITA sites operational in August and October for two weeks to account for extensions

It was decided that since VITA sites are not run by IRS employees but by volunteer basis, it is not up to the IRS to decide when they would be operational. Charles, in his capacity of working with recruiting VITA volunteers, will take this issue to see if VITA sites would have any interest to open these times up for those in need of assistance due to an extension. Mary will research to see if the IRS has any jurisdiction on VITA sites.

Face-to-Face Meetings

The committee discussed possible outreach opportunities to partner a business meeting with. Possible partnership opportunities include VITA sites, Small Business Organizations, public activities such as county fairs, IRS workshops etc.

Laurie discussed a Small Business event on March 12 th that the Taxpayer Advocate Service is going to participate in. The committee decided that this event would be good for the committee to participate in. Laurie will get more information about this event and report back at the next meeting.

The second face-to-face meeting will be in San Francisco in May.

Outreach and Marketing Materials

Judi discussed the strategy that the Ad Hoc committee was working on. Laurie is working on a talking points paper to do outreaches. It was decided that the committee would work on this and share this document with the Ad Hoc committee.

Other Committee Business

Cheyanna asked the members that were not able to attend the annual meeting to pick a subcommittee to work on. Charles choose to stay with the Adult Education Subcommittee and Curtis choose the annual report subcommittee.

Individual Outreach Goals: Cheyanna asked those members not in attendance to make an individual goal for Outreach. Charles will promote TAP in his VITA committee. He will do one outreach a quarter. Curtis will do one outreach a quarter.

Cheyanna asked if there was any other business to be discussed. No other business.

Public Comments

No comments from the public.

Closing and Assessment

Assessments: The meeting was quick and productive. The next meeting will be a teleconference on December 2, 2003 at 9am. Cheyanna adjourned the meeting.



**Area 7 Committee Meeting Minutes
October 4, 2003
Grand Hyatt Hotel
Washington, D.C.**

Attendees:

- Yvonne Gallegos Bodle
- James Griffin
- Cheyanna Jaffke, Area 7 Chair
- Howard Perkins
- David Robinson
- Laurie Keleman, Designated Federal Official
- Mary O'Brien, Program Analyst

Members Not Present:

- Curtis Feese
- Chris Lowe
- Charles Taylor

Getting to know you Introduction

By consensus, this activity was dropped from the agenda. There are no new members that have joined the committee at this time.

Confirmation of Area 7 Chair and selection of new vice chair

Cheyanna Jaffke was confirmed as the Area 7 chair. By consensus, Yvonne Gallegos Bodle was confirmed as Area 7 vice chair.

Area 7 Business Procedures for the Next Year

Quorum:

It was decided to change the number of panel members to make up a quorum. By consensus, the quorum requirement will be met with four panel members.

Approval Process:

The committee decided to do as much business as possible electronically. Agendas, Meeting minutes, Issues, etc. will be sent electronically. An example: The committee will approve agendas by email. The results of any action done electronically will be reported out at the next business meeting. All discussions concerning an issue will be discussed during a meeting. The email will be simply approve or not approve. If there is any not approve votes, the issue will then be discussed again at the next meeting. The committee decided that when asked for a response that it is necessary to reply to all.

Meeting Dates and Times:

Teleconferences will be held monthly. The benefits of meeting monthly are: It is easier to remember meeting dates and times. Also, monthly meetings could be fairly short. Cheyanna committed to keeping meetings as short as possible. At this time, Meetings will be on the first Tuesday of every month at noon pacific time. The first meeting will be November 4th.

Face to face meeting will be discussed when we know more about outreach opportunities. Laurie stated that each Local Taxpayer Advocate participates in outreach opportunities. They attend Small



Business Fairs, tax practitioner nights. These people would like to talk to the panel. Each quarter, the staff and Laurie could compile a list of activities that are going on that the committee might be interested in attending. Cheyanna stated that this would be great to combine an outreach with a face-to-face business meeting. James agreed. He stated that holding a panel town hall meeting without another event is not enough of a sufficient draw to get people there. The effort put into such a function is not compensated.

It was decided to strive for a group outreach around the San Diego area and one in the San Francisco area.

Action: Mary will put this topic on the agenda for November. Mary and Laurie will research activities that are going on for group outreach.

Action: If there are ideas for group outreaches, please send Mary an email before the next business meeting.

August 1st will be the end due date for all committee commitments as well as individual commitments and goals.

Mission for area 7:

- Participate in outreaches to gather issues
- Work on issues received

Outreach Group Goals for the upcoming year:

- The committee set a goal to have two group outreaches.
- The committee set the goal to have every panel member visit a walk-in office to observe

Individual Outreach Goals:

- Cheyanna will do an individual outreach once a month. At least one big outreach for every quarter:
- Yvonne will do four outreaches. She will concentrate on professionals trade shows and economic summits
- Jim has almost 100 citizens come through his office every day. He would like to make TAP promotional and marketing material available at his office as well as with the Postal Service.
- David will do an outreach to the Association of Government Accountants, an outreach with the AARP, an outreach with the Local Taxpayer Advocate, and an outreach with a Government nonprofit organization that he will identify at a later date.
- Howard will do outreaches at four trade shows:
- Laurie will do 10 various outreaches.

Issues: How will the Area 7 committee work new issues?

By consensus it was decided that for each issue, a panel member assigned on an alphabetical rotation will ♦Shepherd♦ the issue. This does not mean that the panel member will do all the research on the issue. Mary is available to work with the panel member on research and resources.

Action: Mary will make an issue matrix by the next Area 7 meeting.



Jim brought up a new issue that he thinks would be of value to pursue. Professional scam artists who scam the public on tax schemes. There is something seriously wrong in the IRS that allows this fraud to happen.

Action: Mary will add the new issue on Tax Schemes to the issue database and assign Jim to Shepard this issue.

Area 7 Subcommittees

The committee discussed what subcommittees to keep for the upcoming year and which ones to drop. By consensus it was decided to keep:

- Adult Literacy (Charles and Chris)
- Issue ranking (Laurie, Howard, Cheyanna)
- Annual report (Yvonne, David)

Action: Cheyanna will talk to Jim, Chris and Curtis about what committee they want to work on.

Annual Report:

- Will keep milestones/updates in annual report format
- Standing agenda items for the annual report: Outreaches; Issues discussed; Issues working on; and recommendations

Panel Members thoughts about the first year

Pluses:

- Did a significant amount of outreach.
- Worked as a team.
- Got some good IRS education
- Had the opportunity to see that the public was glad to accept what the panel had to offer.

Negative:

- Not defining role of TAP at outreaches.
- We didn't know what we were going to do or where we were going.
- Confusion over member roles.
- Lack of TAP outreach products.
- Not enough face-to-face meetings.

Issue Report outs

Installment Agreements:

The original suggestion came from a taxpayer who stopped paying because he didn't get his monthly statement. Subsequent research and IRS subject matter experts show that the monthly notice that goes out to the taxpayer does not give a balance due statement such that credit card companies give. Kristen Bailey, the IRS program owner, has asked the panel to suggest some language that is clearer and is more useful to the taxpayer. She also liked the panel's suggestion that the panel look at the Interactive Installment Agreement website and make suggestions for improvement. The panel felt that this was confusing for the taxpayer to use. It was decided to make Yvonne's suggestion for complex interest in Installment Agreements a separate issue. Yvonne will be the shepherd of this issue.



Action: Research: Mary will research if everyone in an installment agreement gets a notice every month. She will also try and obtain 12 months of a taxpayer's notices (sanitized) for comparison.

The panel discussed the possibility to contract out Installment Agreements. (billing or just collection)

Action: Mary will research the internal revenue code on complex interest. The results will go to Yvonne.

Action Item: Laurie will send everyone the link to the Installment Agreements.

Adult Education:

It was decided to discuss this topic at the next conference call.

Action Item: Cheyanna will contact Charles for progress of this subcommittee and to ask Charles if he will discuss this at the next teleconference.

Issues on Hold

Contact #360 Mandatory conversion of Pensions

The committee discussed this issue and decided that the issue was legislative in nature and not in the scope of the committee mission.

Issue #510 and Issue #1145 Increase/raise the income limit for a child to claim a parent as a dependent.

The committee discussed the issue and decided that most of the problem is legislative in Nature. It was decided to not pursue this issue and send a letter to the taxpayer explaining how to enter a suggestion on SAMS for the Taxpayer Advocacy Service Systemic Advocacy Program to look into.

#759 Higher Education Credit

The committee discussed the issue and decided not to pursue at this time.

Outreach Issues

The committee discussed what constitutes an outreach. Possible outreaches include: one-on-one conversations, trade shows, fairs, professional organizations, civic groups, government and non-profit organizations. This is not an all-inclusive list. The idea of outreach is to reach the public to listen to their concerns about customer service at the Internal Revenue Service.

The committee discussed ways to advertise the existence of TAP. Getting TAP literature to Taxpayer Assistance Center's was discussed as a resource of advertising TAP.

Laurie stated that it would be helpful to have an outreach kit ready for panel members to take to an outreach. Contents of the kit could include a Check Sheet; Talking Points, post-it pads, pens, Letter Openers, Flyers, etc.

Action Item: Laurie will prepare a check sheet to discuss at the next teleconference.

Mary stated that it would be helpful to continue tracking outreaches. She reminded everyone that there is an outreach report sheet that is used to update the database. At the end of the year, this is helpful in writing the annual report as well as monitoring completion of goals set for the committee as well as individually.



Action Item: Mary will email panel members an electronic version of the Outreach Report Sheet.

It was suggested that it would be a good idea to barcode the suggestion flyer to indicate where the ideas are coming from. The committee discussed that the staff would possibly need to supply 1800 flyers per month.

Action Item: Mary will find out when the Ad Hoc committee plans on completing Marketing Material as well as to pursue the possibility of bar coding for area 7.

Minutes

Minutes for the September 2003 teleconference were approved with no corrections.

Closing and Assessment

Mary distributed meeting evaluations. Evaluations were completed. Cheyanna asked if there was any other business to be discussed. Cheyanna adjourned the meeting.



**Area 7 Committee Meeting Minutes
September 23, 2003
1:00 p.m. Pacific**

Attendees

- Yvonne Gallegos-Bodle
- James Griffin
- Cheyanna Jaffke, Committee Chair
- Howard Perkins
- David Robinson
- Laurie Keleman, Designated Federal Official

Welcome/Announcements/Review Agenda

Committee Chair, Cheyanna Jaffke, opened the meeting. Cheyanna reviewed the agenda and Marla took the roll call. There were no speakers or public scheduled and Cheyanna went to the next agenda topic.

Cheyanna asked if there were any minutes to approve and there were none. Cheyanna reviewed the joint committee report. She informed the committee that a letter was sent to Norma Bishop asking her if she was still interested in participating with TAP and gave her a deadline to respond. Norma did not respond to the letter and TAP is assuming she has resigned. Area 7 now has 2 openings and the committee may have new members in time for the annual meeting.

Discuss New Chair

Cheyanna began this topic by explaining the committee will need a new vice-chair. She asked everyone to think about the position and the committee will vote on a new vice-chair in October.

Annual Report

Cheyanna asked Yvonne and David if they had any information to report regarding the annual report to the joint committee. At this time Yvonne and David did not have anything to report. David was curious about the format for the annual report. Cheyanna explained that the draft is due to the joint committee on October 1st and she will email the format for the annual report.

David explained that he would not be available to help with the annual report since he will be out of town. Cheyanna agreed to help Yvonne and Charles with the report.

Discuss and Decide Issue for Offer and Compromise

Cheyanna asked if everyone received the copy of the issue dealing with offer and compromise and the recommendation on what the committee wants done. Also a suggestion on wording that should be used on the instructions for offer and compromise. Everyone agreed and also felt that this is an issue that has been worked and is ready to be elevated to the joint committee.

Cheyanna asked Laurie if all she need was a quorum to have this issue elevated. Laurie agreed. The committee voted and this issue will be elevated.

Installment agreements

The committee discussed elevating the issue regarding installment agreements. Laurie agreed to copy information from the website and have it available during the annual meeting for discussion. Laurie requested feed back from the committee and Laurie agreed to write up the committees feeling on how poor it is for someone to go in and make a viable installment agreement.



Cheyanna reviewed that she will email the Yvonne the format that the joint committee would like to receive elevated issues. Yvonne will be able to prepare the report and take what Laurie has produced and combine them. The committee will then vote on the issue, for it to be elevated, during the annual meeting.

Adult Education

Charles was unavailable to discuss Adult Education. Laurie explained that the Adult Education has to do with literacy and what Charles wants to do is combine what he's doing with his job and see if it fit. He would like to present it to the committee and see what the committee would like to do with Adult Literacy. Laurie also explained that the Ad Hoc committee that Chris Lowe is in, is also working on Tax Literacy for students in high school and Charles feels that maybe area 7 could work on something similar.

Discuss Annual Agenda for Area Meeting

Cheyanna reviewed some of the things that the committee should be thinking about before they meet in Washington DC .

- Serving as Vice-Chair
- Keep current subcommittees or make changes
- How does the committee feel about the first year
 - Develop expectations for next year
 - Where we see the committee going
 - Commitment and responsibilities that the committee should have
- Number of meetings
- Number of outreaches What is your comfort level?

Judi Nicholas, TAP manager, explained to the committee she would like to see the committee discuss what would the committee like the staff to stop, start and continue doing. Judi also explained that they could break it down by manager, analyst and management assistant. She felt this is a productive way for the staff to understand what the needs of the panel members are.

Cheyanna asked if there was anything on the agenda that was missed. There were no addition items and no public input. Cheyanna asked the committee for an assessment and everyone felt it was quick and efficient. Cheyanna adjourned the meeting.



Area 7 Committee Meeting Minutes August 18, 2003

Attendance

- Curitis Feese, Covina, CA
- Yvonne Gallegos-Bodle, Oxnard, CA
- David Robinson, San Francisco, CA
- Charles Taylor, Los Angeles, CA
- Laurie Keleman, Designated Federal Official

Not in Attendance

- Cheyanna Jaffke, Placentia, CA
- James Griffin, Walnut Creek, CA
- Chris Lowe
- Howard Perkins

Note taker

- Mary Peterson O'Brien

Guest

- Margaret Warren

Welcome/Announcements/Review Agenda

Charles Taylor opened the business meeting. Charles welcomed all members and guests. The agenda was reviewed and accepted with no changes.

Roll Call

Mary Peterson O'Brien took the roll call. Five members are present; therefore, there is not enough members for a quorum.

Review/Approve Minutes

Charles reviewed the minutes from the previous teleconference. No changes were made and the committee approved the draft minutes.

Joint Committee Report Out

Charles gave a brief synopsis of the last joint committee meeting.

Guest Speaker

Mary introduced Margaret Warren, Director of Partnership and Partnership Development (P&PD), Wage & Investment (W&I). Margaret discussed the organizational structure of her department in W & I. She also explained the mission of P & PD. The mission is to develop relationship with national key organizations that reach low-income taxpayers. Some of these groups include those who are less proficient in speaking English, handicapped groups, elderly groups, etc. They are also charged with creating educational and outreach materials to all W & I customers. The product and development group is responsible for developing educational materials for all of their programs. Instead of working one on one, the role is now directed towards partnerships as a facilitator, technical content providers. We try to find organizations to leverage existing services with community resources. One of the key



components is offering financial literacy training and asset building opportunities such as opening and maintaining bank accounts and buying a home. Part of this education is informing taxpayers about tax credits that they may not know is available such as the Earned Income Tax Credit (EITC) and Child Tax Credit. They also help with tax preparation assistance such as VITA. The IRS could not help all taxpayers without working with interested partnership groups.

Asset Building and Financial Education: The IRS does not have its own financial literacy program. Instead, they give information out about other programs that are out there. At the National Level there is a memorandum of understanding with the FDIC and their money smart program to use this curriculum. Margaret also discussed a few other programs that are out there such as Jump Start targeted at the youth. Fannie Mae and Freddie Mac that discusses maintaining and building credit. Margaret also discussed what the IRS has on its own website: www.irs.gov the Digital Daily. She encouraged the panel to look at Understanding Taxes on this site. This site is an interactive site that has teacher plans, different lessons on taxes, the history of taxes.

Ways to implement financial literacy curriculums: We begin by identification of partnership groups in May or June. The purpose is to begin well in advance of the filing season

Question: How do you find these programs on the Internet? Each curriculum is listed on the business' web page. Mary stated that she sent all panel members a list of links to these sites. She also ordered the Money Smart CD for each panel member.

Question: Charles asked if there was any IRS funding to any of the financial literacy programs. Margaret stated that all of these curriculums are provided free. As far as funding from the IRS, there are no grants. There is no congressional provision that allows this and there is also no budget.

Question: How does the IRS choose organizations to partner or work with?

The IRS is industry channel focused. There is a channel for financial institutions, government agencies, educational institutions, large employers, and for volunteer community organizations. This group is only in its third year of existence and is still growing. They look for groups that are on the cutting edge and also for groups that are interested and could help fund to help financial literacy, strengthen families, etc. Margaret stated that if you know of such groups, she would be happy to gather that information. Currently there is approximately 160 existing or emerging community based coalitions.

Question: On all of the websites for financial literacy researched so far (other than the IRS website), there is no module on taxes. Does the IRS plan on doing anything about this?

Initially, the IRS is trying to leverage the programs that exist and has not worked on this at this time. This is an excellent point for this group to work on. There is no strong tax element in these curriculums at this point.

Pending Issues

Cheyanna was unable to attend the meeting; therefore, it was decided to discuss the Offer-in-compromise issue at the next meeting.

Yvonne gave an update on the Installment Agreement Issue. Yvonne thought that it was really a problem that the taxpayer could not calculate a balance due by himself or herself because of compound interest. She wrote a statement of problem and would like everyone to read it. The committee agreed to review the document and discuss it at the next conference call.

Charles discussed Adult Education. Charles participated on an EITC/VITA task force in Los Angeles . He would really like to work on the tax component of the adult curriculum and would like to work more



with this and involve the EITC/VITA task force. He thinks that this would be a valuable service and a great legacy to leave.

Annual Report

Charles, David agreed to meet directly after the teleconference to discuss the annual report with Mary.

Outreach

Charles discussed that at the last EITC/VITA task force that they were interested in working with the TAP panel. Laurie asked if there were panel members in the Los Angeles area interested in participating in a workshop with congressional aides in September. Charles and Yvonne were interested in attending. Laurie will email the date and time to the entire panel.

Annual Meeting

Charles announced that he would not be able to attend the October annual meeting. He asked if everyone else would be attending. Mary stated that the committee should look at what they would like to accomplish at this meeting since there was going to be time allotted for the area committees to meet. It will be important to develop an agenda to be productive.

Charles asked if there is any word on new panel members and would they be at the annual meeting. Mary replied that the national office is working on getting new members on board; however, there is no word on when this would happen.

Public Input

No public input at this time.

Closing/Assessment

Charles concluded by asking the committee if there are any additional comments. There were no additional comments by the committee at this time and Charles adjourned the meeting.



Area 7 Committee Meeting Minutes July 21, 2003

Attendance

- Curitis Feese, Covina, CA
- Yvonne Gallegos-Bodle, Oxnard, CA
- James Griffin, Walnut Creek, CA
- Cheyanna Jaffke, Placentia, CA
- David Robinson, San Francisco, CA
- Charles Taylor, Los Angeles, CA
- Laurie Keleman, Designated Federal Official

Not in Attendance

- Norma Bishop
- Howard Perkins

Note taker

- Marla Ofilas

Welcome/Announcements/Review Agenda:

Charles Taylor opened the business meeting. Charles welcomed all members and guests. The agenda was reviewed and accepted with no changes.

Roll Call

Mary Peterson O'Brien took the roll call.

Review/Approve Minutes

Charles reviewed the minutes from the previous teleconference. No changes were made and the committee approved the draft minutes.

Joint Committee Report Out

Charles gave a brief synopsis of the last joint committee meeting.

Leadership Transition

Charles explained to the committee that the panel is coming up on a new year and asked committee if there would be anyone interested in serving as the Chair of Area 7 as of October 1st. Because of time constraints, Charles will be unable to continue as the chair. Cheyanna Jaffke indicated that she would be interested in becoming the new area 7 vice chair or chair. Cheyanna also expressed that she would feel more comfortable to know if the current vice chair is still interested in participating in the committee as well as serving as chair or vice chair. Charles will continue to work this issue with the joint committee. Charles concluded by asking the committee to think it over and notify him if anyone is interested.

Pending Issues

The first pending issue the committee discussed was offer-in-compromises.

Cheyanna recapped problems with taxpayers when they would file an offer-in-compromises. The OIC would be rejected because the taxpayer did not file all their returns. The reason why taxpayers did not



file all their returns is because they weren't legally required to file and their income was below the minimum level. Cheyanna researched the instructions and the instructions reveal that you are not eligible for an offer-in-compromises if you did not file all your required federal returns. She felt what would be helpful if the committee could add to the instruction an area where the taxpayer includes a statement I have filed all my tax returns except for the year 1999 because my income was below the minimum level. She felt that this would help the person that is reviewing the offer-in-compromises to recognize why the return wasn't filed. Currently, the only information they have is that a return wasn't filed without knowing why. Unfiled returns result in an automatic rejection. Cheyanna asked the committee what her next step should be.

Laurie Keleman added that being from the Taxpayer Advocate, she had two cases in the last four months regarding taxpayers OIC being rejected because they did not file a required return. The TAS is working to correct this problem. She felt this is a good issue and the committee should move forward. Mary offered that the committee could come up with specific language as a recommendation to change the OIC instructions. Cheyanna asked once the recommendation is written up, where does the recommendation go from there. Charles replied that all recommendations are elevated to the Joint Committee for review. Once they review it, joint committee will forward it to Daryle Temple, TAP Director, and she will forward it to the appropriate division that would be responsible for making the change. Cheyanna understood and express that her goal is to have the recommendation available to the committee by the next teleconference. Charles asked if there were any questions regarding OIC and no one had any questions.

The next topic discussed was Installment Agreements. Yvonne Gallegos-Bodle informed the committee that she is still working on this issue. She is working with Laurie and they will be meeting in Los Angeles. She concluded that there wasn't anything additional to report. Laurie mentioned to the committee that she went on the IRS website to try and set up a mock installment agreement for herself to see how, for a taxpayer, this would work. She followed the steps and input the information needed but found that she was frustrated. It took her five tries to come up with an amount to have it paid off in a certain amount of time. Her feelings is that there needs to be a meeting between the committee, as citizens, and ask each other What would you like to see to get an installment agreement that would get the debt paid off. Mary asked if the website shows what the penalties and interest will be. Laurie responded that it says penalties and interest will accrue but does not give the amount.

Action: Include Installment Agreements on the next teleconference agenda so Yvonne and Laurie can provide an update.

Charles continued by reviewing the next issue, Adult Education and Financial Literacy issue. Charles spoke about Margaret Warren, who would be speaking to the committee regarding what the IRS is doing to educate the public regarding financial literacy. He asked Mary if Margaret Warren wanted the committee to focus on a specific area so she would be able to talk about it in a future meeting. Mary related that one of the things Margaret had wanted was for the committee to do some preparatory work and talk about what the committee wanted to focus on. This would help her be better prepared to speak to the committee on the various subjects. Mary worked on a small packet of different programs available on the Internet. Mary also stated that the Ad Hoc is working on a high school curriculum and that it would be important for this committee to know what the Ad Hoc committee is working on so that there is not a duplication of effort.

Charles said that he attended a meeting for a local task force that the United Way put together. The United Way has put together a EITC task force were they are trying to assemble a group of VITA centers in the greater Los Angeles area. The meeting was very productive and another meeting has been scheduled for August 14th. Also, a big part of the meeting will be financial education and to educate taxpayers on EITC. Also, find ways to protect taxpayers from companies that promises to give tax refunds in 24 hours at high fees. Charles felt this is something that the panel could latch on to as



well and make this a component of what the area committee is doing. Charles should have more information regarding this task force within a couple of weeks.

Dave Robinson asked if there were other sources available to determine other initiatives that are going on by state and how does Area 7 fit in with the other activities that are going on in the financial literacy program. Mary suggested that each state has information on their own state's program that can be found on the state's Internet website. Dave felt it would be a good idea to see if there are other groups working on the same issue so the committee is not duplicating their efforts.

Charles discussed having a financial literacy subcommittee and Yvonne and David would participate in the committee. Charles felt that before the subcommittee began their work, he wanted to get an update with Chris Lowe to see what was taking place on with the Ad Hoc committee. Charles also felt that Margaret could also discuss financial literacy at a future meeting.

Mary asked if the committee wanted Margaret to speak at the next teleconference to discuss financial literacy and the Vita centers. Charles felt it would be helpful to find out what was going on, also, since there were no Vita centers in Ventura County or other parts of California. Charles asked if there could be a way the committee could help promote Vita sites during the filing season. Many times you see advertisement for H&R Block or Hewitt Jackson but none for Vita sites. Charles explained that this is something that Dave and Yvonne could discuss since they are on the subcommittee for this issue.

New Issues

Charles asked the committee if there were any new issues that need to be discussed. Mary explained that she entered a research report on the new issues that have come in from the TAP telephone line.

Yvonne had a question regarding the financial literacy grant for JP Morgan Chase Foundation. She asked if this is a topic that was discussed in a previous call. The committee did not recall this and Charles asked that this item is added to the agenda for the next teleconference.

Action: Add to the agenda for the next teleconference Adult Education.

Yvonne also asked if there has been any discussion regarding the amount of work given and time being put into the issue and area committees. The committee discussed different discussions regarding this issue. Charles asked Mary if she would be able to look into this for clarification. Mary indicated to Charles that he could bring this issue up with the Joint Committee and it could be an issue that gets elevated. Charles believed that the time commitment to be on an issue and area committee is overwhelming. He agreed to bring this up with the Joint Committee during their next meeting.

Action: Charles will elevate the time commitment issues with panel members to the Joint Committee.

First Issue

Charles referred back to the 4 new issues that Mary put together. The first research report deals with a caller that has a problem when calling the IRS and feels that the IRS line is too complicated. This caller has to make repeated calls to the IRS and is unable to connect with someone. He feels it is burdensome and a lack of one stop service. Charles asked if the committee had any comments or suggestions. Mary suggested that the committee call the IRS 1040 line to get a feel of what the public goes through. Charles indicated that he has tried calling this line on a number of occasions and didn't find the wait too long. Charles asked if this is an issue that the committee should look into as far as improvements to the toll free line and to make it more user friendly.

The committee continued to discuss this issue in detail. The committee decided to forward this issue to the appropriate area committee that is already working on improvements to the IRS 1040 line. The committee felt they would be duplicating their efforts. Charles asked for consensus and all agreed.



Second Issue

Charles began discussion on the second issue. Mary indicated that she tried to contact the person that submitted the suggestion to get clarification on the suggestion but has been unsuccessful. Charles asked if anyone has any questions regarding the second issue. A committee member recalled that there was an issue committee already in place that is working on notice clarification. The committee came to a consensus to forward this issue to the appropriate committee that is working on notice clarification.

Third Issue

Charles reviewed the third issue with the committee. This research report is about a taxpayer who's being audited. The taxpayer feels that the IRS examiner who is conducting the audit is harassing him. The examiner is asking the taxpayer to produce a number of documents for the audit and each time, the taxpayer incurs a charge by his accountant. Charles explained that this issue falls under the category of the audit process and sub category is compliance burden on small business self-employed.

The committee felt that this is a personnel issue and not an improvement on the product and services to the IRS. The committee agreed to forward this issue on to the Taxpayer Advocate Service.

Fourth Issue

Charles read the description of the last issue. The issue came from a taxpayer that commented on the use of the IRS website and the IRS forms that are available. The taxpayer is having difficulty saving the forms and feels the directions to save documents is unclear. Charles explained that the main category is electronic filing, computer issues and subcategory is publications, forms and notices.

The committee discussed computer programs that are available to the public that allows someone to save pdf. files. The committee felt that this is a computer issue not a tax issue. The committee came to a consensus that they will provide assistances to the taxpayer and refer the issue on to the e-file committee.

Outreach

No new information regarding outreach at this time.

Other Issues

No other issues discussed at this time.

Future Meeting Planning

Charles reviewed the decision that was made by the committee. The committee agreed to meet every third Monday of the month. The next meeting is scheduled for Monday August 18 at 8 am pacific.

A committee member asked what city the TAP annual meeting will be. Charles explained that the meeting will be held in Washington DC at the Grand Hyatt Hotel.

Charles asked Mary what the status was for the committee to have a face-to-face before the TAP Annual meeting. Mary explained to the committee that Area 7 would not be able to meet before the annual meeting.

Public Input

No public input at this time.

Closing/Assessment

Charles concluded by asking the committee if there are any additional comments. There were no additional comments by the committee at this time and Charles adjourned the meeting.



Area 7 Committee Meeting Minutes June 16, 2003

Area 7 Panel Members held a teleconference on June 16, 2003 from 8:00am to 9:00am Pacific Daylight Time.

Members in Attendance:

- Yvonne Gallegos-Bodle Oxnard, CA
- Curtis Feese, Covina, CA
- Cheyanna Jaffke Placentia CA
- Howard Perkins Suisun City, CA
- David Robinson San Francisco, CA
- Charles Taylor, Chair Lancaster, CA
- Laurie Keleman, Designated Federal Official Los Angeles, CA

Members Absent:

- Norma Bishop Santa Barbara, CA
- James Griffin Walnut Creek, CA
- Chris Lowe Placentia, CA
- Michelle Nelson Mission Viejo, CA

Staff in Attendance:

- Mary O'Brien: TAP Program Analyst Seattle, WA

Guests:

Welcome/Announcements/Review Agenda:

Charles Taylor opened the business meeting. Charles welcomed all members and guests. The agenda was reviewed and accepted with no changes. Charles asked Mary to introduce the IRS guests present to discuss Installment Agreements and the Practitioner Priority Service.

Installment Agreements:

Kristen Bailey, SB/SE Program Manager and Jon Monroe, SB/SE Analyst gave a presentation about the history, present and future plans for Installment Agreements. Some of the highlights were:

- The IRS processes 2.1 million installment agreements per year. 80% of these are secured over the phone or by taxpayers mailing in a request for an IA. The majority of requests are for individual taxpayers rather than business owners.
- Approximately 8.6 Billion dollars a year in tax liabilities are in an installment agreement.
- Up to \$25,000 in debt can qualify for an IA streamlined process.
- Generally, the IRS will accept an IA if the taxpayer can pay what is owed within a 5 year time frame and owe less than \$25,000.
- Processing IA's. Although the IRS would like to be able to send a monthly statement like a credit card statement to taxpayers in an IA, the IRS does not have the resources to do this at this time.
- Currently, the IRS sends out a monthly invoicing (it does not give a balance due) and a yearly statement. The monthly statement is called a CP521, the information is just what the monthly



payment is and where to send the payment. At this time, the IRS systems cannot be programmed to give a balance due.

Questions from the panel included:

- Does the IRS charge compound interest on IA's. Kristen answered that yes, the IRS compounds interest per the IRC.
- Would better education concerning IA's decrease the number of taxpayers who default?

Kristen asked the group to look at the educational material on the IRS website www.irs.gov. On this site is an interactive program on Installment Agreements. The IRS is in the process of updating this website and would like panel feedback. Also, Kristen asked the panel to give feedback on the CP521.

Practitioner Priority Service:

Anna Howington, SB/SE Program Analyst gave a presentation on improvements to the PPS as well as the history.

- The PPS no longer has a practitioner leave a message for an IRS assistor to get back to them. The IRS has an Intelligent Call Site that routes the calls to the next available assistor.
- One problem is that the wait times in the past have been lengthy. The IRS has made improvements to the call times and the times have been shortened to around 200 seconds.
- Transcript Requests
- The PPS has taken into consideration the problem with a Power of Attorney. A POW can be faxed to the PPS assistor while talking. This helps the assistor resolve taxpayer problems right away. The assistor has the ability to fix a taxpayer's account.
- For those problems that can't be resolved by the PPS, the call is referred to the appropriate area of the IRS to resolve the problem.

Questions from the Panel:

Could the wait times be given at the beginning of the call. I.e. Your wait for the next available assistor is 5 minutes. This would help the practitioner in deciding to wait or call back at a later time. Anna responded that this was a good suggestion; however, the technology is not currently capable of handling this.

Pending Issues:

- **Installment Agreements (#511):** Yvonnee agreed to take the lead on Installment agreements and report back at the next conference call. Two actions: Comments on the Interactive website and improvements to the CP 521.
- **Offer-in-Compromises (#843):** Cheyanna agreed to take the lead on the recommendation to change the OIC instructions.
- **Alternative Minimum Tax (# (Support Letter to NTA) Decision:** It was agreed to partner with Area 5 in their letter to Nina with the suggestions from Curtis. Mary will contact Area 5.

New Issues:

- **Practitioner Priority Service (#1961)** The panel decided not to pursue citizen's suggestion. The IRS has already made adjustments to the service. Letter to taxpayer telling him of the new improvements.
- **Schedule A Medical Deductions (#1802)** Legislative Issue, the panel has decided not to pursue
- **Compound Interest (#359)** By consensus, the panel decided not to pursue issue.



- **Self Employment Tax (#1970)** By consensus, the panel decided not to pursue issue.

Las Vegas Tax Forum:

Charles discussed that Cheyanna and Howard will represent Area 7 at the Las Vegas tax forum. As other outreach opportunities are available, other panel members will be able to participate.

Other Issues:

Annual Report. Charles asked for volunteers to work on Area 7's portion of the annual report. Cave, Curtis, Yvonne, and Norma were on the original committee. By consensus, this issue will be discussed at the next teleconference.

Public Input:

No comments from the public

Next Meeting:

The next meeting will be on July 21, 2003 at 8 am PDT. Comments were made that it was very helpful to have an IRS subject matter experts participate.

Closing:

Charles Taylor adjourned the meeting.



Area 7 Committee Meeting Minutes May 12, 2003

Area 7 Panel Members held a teleconference on May 12, 2003 from 12:30pm to 2:30pm Pacific Daylight Time.

Members in Attendance:

- Yvonne Gallegos-Bodle Oxnard, CA
- James Griffin Walnut Creek, CA
- Cheyanna Jaffke Placentia CA
- Howard Perkins Suisun City, CA
- David Robinson San Francisco, CA
- Charles Taylor, Chair Lancaster, CA
- Laurie Keleman, Designated Federal Official Los Angeles, CA

Members Absent:

- Norma Bishop Santa Barbara, CA
- Curtis Feese, Covina, CA
- Chris Lowe Placentia, CA
- Michelle Nelson Mission Viejo, CA

Staff in Attendance:

- Mary O'Brien: TAP Program Analyst Seattle, WA
- Judi Nicholas: TAP Manager Seattle, WA

Welcome/Announcements/Review Agenda:

Charles Taylor opened the business meeting. Charles welcomed all members and guests. The agenda was reviewed and accepted with no changes.

Review/Approve Minutes

The March meeting minutes were approved with no changes.

Report on Joint Committee Meeting:

Charles Taylor gave a brief synopsis of the joint committee (JOC) meeting of the Taxpayer Advocacy Panel held in Washington DC on May 2nd and 3rd of 2003.

- The JOC discussed procedural issues.
- How to elevate an issue to the JOC
- Annual report including the format
- Legislative Issues. Charles discussed the letter from Nina Olson, NTA to Tom Senjeuns, TAP chair concerning legislative issues. He clarified that the TAP was not to try to write new legislation. The process for issues that are legislative in nature is to elevate them the Systemic Advocacy function under the Taxpayer Advocate.
- Nonparticipating TAP members. The procedure is for the chair of each committee to contact the nonparticipating member to explore nonparticipation. It is then up to the chair to talk with Tom Senjeuns about removal.

**Financial Literacy:**

Charles asked the panel to consider working on the problem of financial literacy. Although the Ad Hoc committee is working on this issue, the issue is broad and has many facets. Jim brought up an example of an educational event to promote financial literacy to the Spanish speaking public. Bank of America has produced a Spanish speaking and a program called Consuela Matricula that targets those who are not legally in this country. Banks allow these people to learn how to manage and account and are rewarded with being able to have a bank account. Jim will bring the panel's thoughts on this issue to the Ad Hoc committee meeting in St. Louis and will report back.

Yvonne, Charles and David agreed to form a subcommittee to work on the financial literacy issue.

Action Item: Mary will pull together what other committees in TAP are working on concerning financial literacy.

Pending Issues:

Offer-in-Compromises: The committee discussed that the instructions are unclear on what a taxpayer should do when they are not required to file returns. A suggestion was made to change the instructions to come up with specific language concerning unfilled returns. The question of how many taxpayers get rejected because of unfilled returns.

Action Item: Mary will do more research to see how many are rejected because of non-filing.

Form 8160C: Mary discussed the research requested from the last meeting. Form 8160C is mailed to taxpayers that used a computer to prepare or file their Federal Income tax return. The purpose is not to waste resources that are not needed. The EIN is transcribed from the filed tax return. On the Form 8160C, the IRS requests that any incomplete or erroneous information be corrected and the Form returns to the Internal Revenue Service. The panel reviewed the Form and decided not to pursue the issue.

Action Item: It was discussed that it would be much easier to discuss the issues from the taxpayers if more information could be presented up front. Mary made a commitment to try and get clarification from the citizen if at all possible.

Change of Address on the Internet: The panel discussed the issue and decided that the IRS is pursuing many technology improvements for account access on the Internet. Although this is worth considering, the panel decided not to pursue this issue at this time.

Dependent status for Parents: The issue was discussed. It was decided to put this issue on hold to readdress at a later date with the entire issue of taxpayer burden for the elderly. This might have legislative implications. When the panel discusses this issue they will also think about what the revenue impact might be.

Alternative Minimum Tax: The panel agreed to draft a letter of support to Nina Olson, Taxpayer Advocate for her efforts in her report to congress. The panel hopes that this issue is not dropped. Laurie and Jim have agreed to draft the letter.

New Issues:

Higher Education Credits: The issue was discussed and it was decided to hold issue pending further research.

Electronic Filing with the Married Filing Separate Status: Panel discussed issue and decided not to pursue.



Cashbalance Pensions: The issue was placed on hold to look at when the panel discussed taxpayer burden on the elderly.

Contact # 1332: The citizen was asked to clarify the problem. No response; therefore, the panel agreed to not pursue the issue.

Installment Agreements: The problem of not knowing what a taxpayer's balance is when in an installment agreement seemed to be burdensome. By consensus, the panel agreed to look into this issue further. More research has been requested. Mary will see what percentage of IA's default? What is the current process of notifying taxpayers, etc.

Form K-1 Filing requirements: It was decided to not pursue this issue.

Free E-Filing: By consensus, the panel decided not to pursue the issue.

Outreach Report:

The panel was reminded to send Mary any information concerning outreaches. It was discussed that Area 7 would not have another face-to-face meeting. For the panel members who could drive to Fullerton, an outreach could still take place. Charles will discuss the issue with Chris Lowe and report back to the committee.

Other business:

Mary urged everyone to use the self-instructional handout on TAPSpeak. She has posted pertinent information concerning Area 7 to this site. She has also signed everyone up to use it. Any questions or if anyone needs help, please contact Mary.

Charles brought up that time is moving quickly. He asked if everyone would agree, to increase the frequency of meetings. By consensus, everyone agreed to meet monthly. Next meeting will be scheduled for June 16th at 8am to 9am PDT. Charles also asked that we tighten up the meeting so that it lasts only one hour.

Public Input:

No comments from the public

Closing:

Charles Taylor adjourned the meeting.



Area 7 Committee Meeting Minutes March 7, 2003

Area 7 Panel Members held a face-to-face meeting on March 7, 2003 from 12:30pm to 6:00pm pacific standard time.

Members in Attendance:

- Yvonne Gallegos-Bodle, Oxnard, CA
- Curtis Feese, Covina, CA
- James Griffin, Walnut Creek, CA
- Cheyanna Jaffke, Placentia CA
- Howard Perkins, Suisun City, CA
- David Robinson, San Francisco, CA
- Charles Taylor, San Diego, CA
- Laurie Keleman (Designated Federal Official), Los Angeles, CA

Members Absent:

- Norma Bishop, Santa Barbara, CA
- Chris Lowe, Placentia, CA
- Michelle Nelson, Mission Viejo, CA

Staff in Attendance:

- Mary O'Brien: TAP Program Analyst, Seattle, WA
- Judi Nicholas: TAP Manager, Seattle, WA

Guests:

- Irene Scandiffio
- Stella Lee
- Mary Ronenell
- Gladys Knight
- Alan Jenson, LTA for San Jose

Welcome/Announcements/Review Agenda:

Charles Taylor opened the business meeting. Charles welcomed all members and guests. The agenda was reviewed and modified.

Upcoming Changes for IRS Stakeholder, Partnership, Education and Communication (SPEC):

Irene Scandiffio, IRS Area 7 Director of SPEC, gave a presentation on the upcoming changes for the Stakeholder, Partnership, Education and Communication (SPEC). The following subjects were discussed:

- Background of SPEC

One of the objectives that came out of the Revenue Reform Act of 1998 and the reorganization of the IRS was a focus on "pre-filing" for IRS customers. This pre-filing focus for individual taxpayers was charged to the IRS Stakeholder Partnerships, Education and Communication (SPEC). Their mission statement:



Stakeholder Partnerships, Education, and Communication

Mission Statement

"To assist taxpayers in satisfying their tax responsibilities by building and maintaining partnerships with key stakeholders, seeking to create and share value by informing, educating, and communicating with our shared customers."

SPEC Concept of Operations Developed: new & existing partnerships

Strategy

- Educate internally and externally,
- Effectively leverage our resources by expanding and maintaining partnerships with key stakeholders,
- Improve our product development based on customer feedback, and
- Improve our reporting and measurement systems.
- External Communications
- Timely Distribution of VITA Site Listings
- Publicize VITA Training Schedules
- Innovative Recruitment & Retention Techniques
- Speakers & Informational Items to Partners
- Expand Electronic Means of Communication
- Use Standardized, Targeted Products & Services

Measures - Business Results

- Establish VITA Activity Database
- Timely & Complete Reporting by Sites
- We would Use Activity Information to Improve Efficiency and Effectiveness
- Increase the Number of Partners
- Form / Join Coalitions
- Increase Number of Self-Sufficient Partners

Measures - Partner Results

- Qualitative
- Delivery of Programs & Services
- Increased Return Accuracy
- Level of Self-Sufficiency
- Assistance to Other Partners
- Quantitative

Review/Approve Minutes

The January meeting minutes were approved with no changes.

Joint Committee Report Out:

Charles Taylor gave a brief overview of the Joint Committee conference call.

- The Joint Committee is scheduled to meet in Washington DC on May 2nd and 3rd.



- The Joint Committee discussed time commitments of the panel members. Many panel members feel pressure from serving on two committees. The joint committee is still getting input and will continue to discuss the issue.

Outreach Report:

- Cheyanna made presentations to VITA sites. She will do 6 more between now and April 15th.
- Howard met with several civic groups.
- Yvonne talked with Ventura County Tax Preparers
- David discussed TAP with the local AARP a senior center, and the Association of Government Accountants. David also met with the Oakland Local Taxpayer Advocate, Ben Lowe to discuss possible outreach events.
- Curtis met with the Covina Chamber of commerce
- Jim met with Ben Lowe, LTA for Oakland and discussed TAP with the Federal Executive Board. Jim also prepared and distributed a survey concerning TAP to the San Francisco Passport office.
- Laurie met with the SMRLC

Yvonne asked that all panel members be notified when someone is doing a presentation. She would like to attend and encourages others to do the same. The benefit would be to give each other ideas. Email all outreaches to Mary. She will ensure that the rest of the panel members are notified.

Issues Process:

Laurie and Charles discussed the process that was developed for committee approval to prioritize and present issues. The issue sub-committee (Charles, Laurie and Howard) will meet to prioritize the issues for discussion.

The panel agreed to the issue process by consensus.

New Issues:

#168 Offer In Compromises - requiring returns for those who are not liable to file.

Issue open for further analysis. Mary will find out the specific procedures for requesting returns. How many people get rejected because of unfilled returns. Who is reviewing the OIC's . Where in the process does it get rejected and do they have a capability to check if taxpayer has a filing requirement. Pull the IRC code.

#290 Gambling winnings

Consensus is to not pursue this issue.

#69 Navigating the IRS digital daily website to fine the Internal Revenue Code.

The panel looked at the website and decided that the information was available. By consensus, the issue will not be pursued.

#67 Form 8160c - wrong Employer Identification Number

Issue on hold pending more research: Get more research about the letter, who sends it out, when and how many per year are mailed.

#14 Change Form 1040EZ so that more people can file with this Form.

The panel concurred that to change the Form would increase the complexity and cause undue hardship to those taxpayers it was intended to help. Form 1040A is also an avenue for those who do not need to file Form 1040. By consensus it was decided not to pursue issue.



#23 Ability to change an individual address over the Internet

Issue on hold pending research. Possibility to refer issue to the E-File subcommittee.

#24 and #25 Customer Service at the San Bernardino, CA Office

Issue to be referred to local territory manager for customer service. Issue closed.

#21 Abbreviated Depreciation Form

Panel decided not to pursue issue by consensus. Issue closed.

#22 Box put on Form 8109b to indicate year payment should be applied to

Panel decided not to pursue issue by consensus.

#19 Power of Attorney problem

Panel discussed issue and decided that this is an education issue since this is already policy. Issue closed with no further discussion.

#16 Internet research by IRS employees

Panel discussed issue and decided that there is a learning curve in any job. This is likely the case. No further discussion on issue. Issue closed.

#257 Audit Appeal Rights

Although the panel discussed the issue and decided that this is not a TAP issue, it was decided to refer this to the LTA. The LTA may be able to educate him on reconstructing records. The LTA will also address discourteous treatment.

#18 Notification of Estimated Tax Payments not received by the IRS

The panel discussed issue and by consensus decided not to pursue.

#15 Parent Dependent Criteria

Issue is pending for additional research. Find out how many taxpayers are affected. What are other tax remedies are available.

#17 Accrual of Interest and Penalties when in an Installment Agreement

By consensus, it was decided to not pursue this issue.

#20 Alternative Minimum Tax

The panel has decided that although this is an important issue, the NTA is working this legislative issue and the panel may use its time on other issues. It was decided that the panel would develop a letter of support to send to the NTA.

#121 Flat Tax

The panel decided not to pursue issue by consensus.

#29 Form 1040NR

The panel decided not to pursue issue by consensus.

#44 Eliminate Passive Activity Rules

By consensus, it was decided not to pursue issue.

#77

By consensus, it was decided that this is not a TAP issue. No further action.



Administrative:

Action: The panel decided by consensus that when a suggestion or comment from the public is given to the TAP staff that is not a TAP issue, the analyst should not write the issue up for panel consideration.

Public Input:

No comments from the public

Closing:

Charles Taylor adjourned the meeting.



Area 7 Committee Meeting Minutes January 14, 2003

Area 7 Panel Members held a teleconference on January 14, 2003 from 12:30pm to 2:30pm pacific standard time.

Members in Attendance:

- Norma Bishop, Santa Barbara, CA
- Curtis Feese, Covina, CA
- Cheyanna Jaffke, Placentia CA
- Howard Perkins, Suisun City, CA
- David Robinson, San Francisco, CA
- Charles Taylor, San Diego, CA
- Laurie Keleman (Designated Federal Official), Los Angeles, CA

Members Absent:

- Yvonne Gallegos-Bodle, Oxnard, CA
- James Griffin, Walnut Creek, CA
- Chris Lowe, Placentia, CA
- Michelle Nelson, Mission Viejo, CA

Staff in Attendance:

- Mary O'Brien: TAP Program Analyst, Seattle, WA

Welcome/Announcements/Review Agenda:

Charles Taylor opened the business meeting. Charles welcomed all members. The agenda was reviewed.

Roll Call

Mary O'Brien announced that James Griffin had called to be excused from this teleconference, and Chris Lowe and Yvonne Gallegos-Bodle had called to say they would either be late or unable to attend this teleconference. Mary O'Brien took a roll call of all panel members present. She also asked if any guests were present. Dan Rinky announced himself as a guest and observer.

Review/Approve Minutes

The November Meeting minutes were approved with no changes.

Joint Committee Report Out:

Charles Taylor gave a brief overview of the Joint Committee conference call.

- The Joint Committee are scheduled to meet in Washington DC on May 2nd and 3rd.
- Travel Cards. Taxpayer Advocacy Panel members will not receive government issued credit cards.
- Deryle Temple was announced as the new Taxpayer Advocacy Panel Director.



Issue Committee Report Outs:

- Norma Bishop gave highlights concerning the SB/SE Payroll Tax issue committee meeting on January 10th and 11th.
- Yvonne Gallegos-Bodle provided a written summary of the Multi-Lingual Issue Committee.

Sub-Committees:

Policies and Procedures:

Norma Bishop gave an update of what the committee was working on in regards to working issues. The subcommittee will continue to meet and have a procedure to discuss at the next business meeting.

Annual Report:

The subcommittee had nothing to report for this meeting.

Outreach, Marketing and Event Committee:

An outreach plan was emailed to all. Cheyanna Jafke asked that it be reviewed and ready to discuss at the next business meeting. Charles Taylor asked that everyone participate in one outreach event and be prepared to present a summary at the next Business Meeting.

Action Item: Mary O'Brien will mail all with marketing materials. Panel members were asked to contact Mary when marketing supplies are needed.

Future Meeting Planning:

The dates for the next meeting were discussed. It was decided to meet in Fresno, California on March 7th and 8th. In conjunction with the meeting is a tour of the IRS Fresno Campus and a partnering opportunity with a Fresno VITA tax assistance site.

Public Input:

No comments from the public

Closing:

Charles Taylor adjourned the meeting.