



2005 Meeting Minutes Area 7

- December 15, 2005
- September 28, 2005
- September 1, 2005
- July 28, 2005
- June 30 - July 1, 2005
- May 26, 2005
- April 28, 2005
- March 24, 2005
- February 24, 2005
- January 19, 2005

Area 7 Committee Meeting Minutes Area 7 Committee Meeting December 15, 2005

Designated Federal Official

- John Tam, Oakland Local Taxpayer Advocate

Committee Members Present

- Margaret Ferguson, CA
- David Jones, CA
- Allena Kaplan, CA (Vice-Chair)
- Tom Karwin, CA (Chair)
- Mavis Smith, CA
- Iris Sosa, CA
- Wayne Tanna, HI
- Wayne Whitehead, CA
- Doug Wilhelm, CA
- Gil Yanuck, NV

Committee Members Absent

- Margaret Balcom, CA
- Larry Combs, CA
- Greg Gurse, AK

Staff

- Dave Coffman, Analyst
- Jeff Stern, Analyst
- Judi Nicholas, Program Manager



Other Attendees

- None

Opening/Welcome

John Tam opened the meeting and Tom welcomed the members. Allena reviewed the agenda. Jeff performed the roll call and a quorum was met. The new and returning members introduced themselves to one another.

Joint Committee Report Out

Tom advised that there was no new news from the Joint Committee. He suggested that the members review the November minutes from the Joint Committee.

Issues

- *Mail Procedures at TAC Offices #3363*
Tom asked if the committee was ready to give final approval to the Joint Committee referral. The proposal was for each taxpayer assistance center (TAC) that is co-located with another IRS office to assign a "duty officer" each day. This duty officer would be available to accept documentation submitted by taxpayers for IRS employees (such as Revenue Agents and Revenue Officers) who were unavailable that day.

Gil raised an objection, based on his conversations with IRS employees at TAC offices. Employees have expressed concerns both over safety issues and the availability of employees to serve as duty officers.

Decision: It was decided to table the referral, and reassign the issue to Tom for further research.

- *IRS Refund Website #3268*
Judi announced that the issue is being rewritten and reevaluated by the Joint Committee.

Decision: The committee will table this issue until the rewrite is complete.

- *Electronic Tax Law Assistance Website #3483*
Tom announced that there have not been any updates on this issue.

Decision: It was decided to carry this issue forward to the January meeting.

- *EITC—Enclosure with Utility Bills #3708*
This is a new issue developed by Doug Wilhelm. It involves enclosing informational "stuffers" about the earned income tax credit (EITC) inside utility bills.

Judi reported that she had shared Doug's proposal with the EITC office. They are drafting a publication similar to the stuffer Doug proposes for EITC. The EITC office discussed with Judi the need to target a specific audience rather than using a "shotgun" approach. Gil added that the Stakeholder, Partnership, Education & Communication (SPEC) office also prefers targeting a specific audience.



Action: Jeff will review the draft publication to determine if it can be applied to this issue. Judi will talk with Stakeholder Partnership Education & Communication, which has experience communicating with low income groups that may be entitled to the EITC, to get their views on this proposal.

Town Hall Meetings

Allena reported that the Area 7 town hall meeting will be held on February 1st in San Diego, California, on the campus of the University of San Diego.

Decision: A working team will be established to attend and work at the town hall meeting. Judi will e-mail information on the meeting to all committee members. Members interested in joining the working team should express their interest in an e-mail to Allena. Allena will then randomly select the participants for the working team by December 22, 2005.

Mentoring

New members have been paired with returning members. Members have been notified of their mentor/new member pairs.

Annual Meeting

Pre-read materials for the annual meeting should arrive by the end of next week.

Tom reminded everyone that the Area 7 Committee dinner will be held on Thursday, January 12th.

Other Business

Judi advised the new members that meeting minutes, draft agendas, and other materials are posted on TAPSpeak. She encouraged the new members to log on to TAPSpeak and become familiar with using it. Judi informed the new members that they should call Dave or Jeff if they encounter any problems or have any questions.

Action: Dave will e-mail TAPSpeak registration instructions to the new members. He will also include e-mail addresses for Tom and Allena.

Closing

John Tam closed the meeting.



**Area 7 Committee Meeting Minutes
Area 7 Committee Meeting
September 28, 2005**

Designated Federal Official

- Laurie Keleman, Local Taxpayer Advocate, Los Angeles, CA

Committee Members Present

- Clayton Akena, HI
- Margaret Balcom, CA
- Larry Combs, CA
- Allena Kaplan, CA (Vice-Chair)
- Tom Karwin, CA (Chair)
- Howard Perkins, CA
- Iris Sosa, CA
- Sherry Whah, AK
- Doug Wilhelm, CA
- Gil Yanuck, NV

Committee Members Absent

- None

Staff

- Judi Nicholas, Program Manager
- Dave Coffman, Analyst
- Jeff Stern, Analyst
- Marla Ofilas, Note Taker

Other Attendees

- Margaret Ferguson, CA
- Wayne Tanna, HI
- Wayne Whitehead, CA

Welcome

Laurie opened the meeting and Tom welcomed the members and guests.

Review Agenda

Allena reviewed the agenda.

Roll Call

Marla performed the roll call and a quorum was met.

The guests introduced themselves to the members.



Joint Committee Report Out

Tom reported on the last Joint Committee teleconference. Topics included the following:

1. **Town Hall Meeting** – The town hall meeting is proceeding as planned. The first session will be December 7, 2005, in Philadelphia, PA
2. **Wage and Investment** – Mark Pursley has asked the TAP to provide input on the 5-year Taxpayer Service Strategic Plan for the Wage & Investment operating division.
3. **TAP Handbook** – Members will receive a revised TAP handbook at the annual meeting. Tom complimented the Communications Committee on efforts in revising the handbook.
4. **TAPSpeak** – Members are encouraged to use TAPSpeak, an on-line collection of TAP-related documents. Staff is regularly updating the information found on TAPSpeak, keeping it a reliable source of reference.
5. **Area and Issue Committee Chair Reports** – The area and issue committee chairs rehearsed their chair report presentations with the Joint Committee. The committee provided feedback on the presentations. Each presentation will be three minutes in length and should be less repetitive as the chair reports presented in prior years.
6. **Issue Recommendation** – The Joint Committee reviewed numerous recommendations that were ready for elevation. The committee reviewed the Area 7 recommendation, #3268 IRS Refund Website, and approved it for elevation to the IRS.
7. **Self-Assessment** – The Area 7 self-assessment is due October 7, 2005.

Gil asked for clarification regarding the American Association of Retired Persons' (AARP) decision not to post TAP posters at their Volunteer Income Tax Assistance (VITA) sites. Judi clarified this. TAP member Lynwood Sinnamon participates at an AARP site that has been resistant to displaying TAP posters. Judi reminded everyone that the host of the VITA site makes the decision to post items, not the IRS.

Report on Active Issues

- **#3268 – IRS Refund Web Site – Larry Combs**
Larry provided the guests some background on this issue. During the Joint Committee meeting, Program Manager Sandy McQuin mentioned that the IRS received a similar recommendation in 1998. The IRS returned the recommendation, citing a conflict with Internal Revenue Code section 6103. Larry indicated that the subcommittee is working on developing a new recommendation to work around the code and privacy issue. Judi clarified that the Joint Committee approved the recommendation but has asked Area 7 to enhance their argument based on the new information from Sandy McQuin.

Action: The subcommittee given the task of constructing this issue will take into account the new information from Sandy McQuin.

Larry added that he and the TAP chair, Gwen Handelman, had a teleconference with Nina Olson, National Taxpayer Advocate. Larry indicated that Ms. Olson was very complimentary about the committee's recommendations that are being elevated, the clarity of those recommendations, and the support provided for the recommendations.

- **#3483 – Electronic Tax Law Assistance (ETLA)**
Tom provided background. Tom reported that the subcommittee wants to recommend the IRS continue with ETLA service until it has a suitable replacement. The subcommittee understands that there are budget constraints that would make the recommendation difficult to carry out.

Tom recommended that the committee place this issue in the parking lot until the IRS initiatives for the automation of taxpayer services are studied.



Gil suggested that members read Nina Olson's September 23, 2005 presentation to Congress that includes her opposition to the removal of ETLA. Judi asked the committee to consider if they should place the issue in the parking lot or if, in light of Ms. Olson's presentation, the committee should work the issue due to the considerable emphasis that Ms. Olson has placed on it.

Decision: The subcommittee will continue to work this issue. They will employ a tiered approach, using timeframes for each part of the recommendation.

- **#3363 and #3492 – Mail Procedures at TAC Offices and the TAC Office Budget**
Sherry reviewed the issues and reminded the members that the committee decided to separate the two issues. Judi informed the committee that for every Taxpayer Assistance Center (TAC), there should be a duty officer assigned for the day. In the event that a taxpayer visits the TAC and needs to speak with a non-TAC employee (such as a revenue officer), a duty officer is available to listen and take correspondence from that taxpayer on behalf of the non-TAC employee. Judi suggested the committee recommend that there be a duty officer at every TAC office.

Decision: The subcommittee will continue to work the recommendation and present it to the committee during the next meeting.

Comments on E-File Brochure – Update

Doug gave an update on his recent opportunity to provide input on an e-file brochure.

Self-Assessment Report

The committee provided input and comments to the final draft of Area 7's self-assessment. Members will e-mail Tom any additional input they may have for the assessment.

Annual Meeting Orientation Materials

Judi gave a brief outline of the annual meeting agenda and noted that the agenda is still going through some changes. For returning members, the general session will begin the afternoon of Wednesday November 2nd. It will include guest speakers and chair reports. Thursday November 3rd will be much of the same; however, issue committees will meet and workshops on TAP topics will be available. Candidates for the TAP Chair and Vice Chair will also have an opportunity to speak to the panel. Members that would like to have dinner with their issue committees will have an opportunity to do so on Thursday evening. On Friday November 4th, there will be a continuation of workshops and issue committee meetings. In the afternoon, members will attend area meetings and additional workshops. Area committees will have an opportunity to meet for dinner on Friday evening. Area meetings and workshops will continue into Saturday November 5th.

Two workshops will be offered, Outreach and "What it means to be a TAP member." TAP has also added two new issue committees, Volunteer Income Tax Assistance (VITA) and Taxpayer Assistance Centers (TAC). An issue description for the new committees has yet to be developed.

Judi informed the members that their area committee meetings will include identifying roles and responsibilities, electing a new chair and vice chair, establishing committee goals, scheduling conference calls, and selecting dates for the face-to-face meeting. The meetings will also have an opportunity for members to walk through an issue and discuss various outreach opportunities.

One of the issue committees has developed a packet of materials that new members can use to acquaint them with their committee operations. Judi explained that the purpose of this packet is to allow new members to master the intricacies of working with the committee sooner rather than later. During the Joint Committee meeting, the Joint Committee decided that all committees put together a packet for this purpose. Judi shared some Area 6 suggestions for items that should be included in their packet. Area 6 suggested the following:



1. A document that explains the difference between area and issue committees. This document should include the process committees use to generate recommendations.
2. A list of issues being worked by the committee with a brief summary of each issue.
3. A document that describing the process of issue subcommittees, including the methods subcommittees use to decide which issues should be forwarded to the entire committee.
4. A document that describes and outlines the expectations of outreach.

Judi asked the Area 7 members to send suggestions to her via e-mail.

Action: Area 7 members will send Judi their suggestions for orientation materials.

Area 7 Dinner

Tom has agreed to organize the Area 7 dinner for Friday November 4th. If members have recommendations for particular restaurants, please let Tom know. He will be sending an e-mail to get a count of those attending the dinner as soon as new members are appointed.

Closing

Before the meeting closed, Gil suggested that the members log on to TAPSpeak and read the National Taxpayer Advocate's testimony regarding small businesses. Judi noted that the report also appears on the IRS website, for the new members that are unable to log on to TAP speak.

Laurie closed the meeting.



**Area 7 Committee Meeting Minutes
Area 7 Committee Meeting
September 1, 2005**

Designated Federal Official

- Laurie Keleman, Local Taxpayer Advocate, Los Angeles, CA

Committee Members Present

- Clayton Agena, HI
- Margaret Balcom, CA
- Larry Combs, CA
- Cheyanna Jaffke, CA
- Tom Karwin, CA (Chair)
- Allena Kaplan, CA (Vice-Chair)
- Howard Perkins, CA
- Iris Sosa, CA
- Bruce Twomley, AK
- Sherry Whah, AK
- Doug Wilhelm, CA
- Gil Yanuck, NV

Committee Members Absent

- Robert Forst, CA

TAP Staff

- Judi Nicholas, Program Manager
- Mary O'Brien, Analyst
- Marla Ofilas, Note Taker

Other Attendees

- None

Welcome

Laurie opened the meeting and Tom welcomed everyone.

Review Agenda

Allena reviewed the agenda.

Roll Call

Marla performed the roll call and a quorum was met.

Approval of Meeting Minutes

Minutes from the July 28, 2005 meeting had been approved by the committee.



Joint Committee Report Out

Tom's report on the last Joint Committee meeting was e-mailed to all members prior to this meeting. E-mailing the report will save time during Area 7 meetings. In the future, Tom's report will be available on TAPSpeak.

Tom is preparing a PowerPoint presentation which will be used to report the highlights of Area 7's accomplishments at the TAP annual meeting. Each committee will have three PowerPoint slides to present their report. The first two slides will be prepared by the analyst and third will contain information from the committee's self-assessment.

Report Out on Active Issues

- **Issue 3268 – IRS Refund Web Site**

Larry explained the issue and asked for questions. Cheyanna recalled from the previous meeting that the committee approved the referral but it was subject to final review of the illustration.

Decision: The committee agreed to elevate the referral to the Joint Committee.

- **Issue 3483 – ETLA Web Site**

Tom introduced the recommendation to either maintain the electronic tax law assistance (ETLA) function on the web site, with the intent of improving it over time, or drop the site in favor of saving resources and developing long-term improvements to the web site's search engine. Another option would be to specify a tiered model of responses to taxpayer's questions, with automated services as the initial tiers and more labor-intensive services as the later tiers. Mary commented that the Ad Hoc committee worked on a recommendation to enhance the IRS web site search engine to include Publication 17 in the search. This Ad Hoc recommendation has been elevated to the Joint Committee. Area 7 may use the same process for improving the search engine if the ETLA function is removed.

Doug informed the committee that he is in favor for dropping the current system and soliciting support for a new system. Mary provided clarification, stating that the committee was not suggesting that ETLA should be eliminated. Instead, the taxpayer should make an attempt to research their questions before submitting them through ETLA.

Gil noted that there are other publications that should be "searchable" besides Publication 17. Judi explained that the program owner wanted to start with Publication 17 because it's the first publication that taxpayers research.

Bruce asked if it was wise to suggest that the IRS keep the ETLA system until a new system is created. Due to limited time, the sub-committee decided to work this issue outside the monthly meeting.

Decision: Tom will continue to work with Mary on resolving this issue. The emphasis will be on formulating a tiered model of responses to taxpayer's questions.

Action: Mary will schedule another sub-committee meeting.

- **Issues 3362 and 3492 – TAC Closure/Mail Procedures**

Sherry explained that the closures of the certain Taxpayer Assistance Center (TAC) offices have been temporarily suspended. The IRS is still considering the closure. Judi informed the committee that the TAP will be adding an issue committee dedicated solely to TAC issues. The TAC issue committee will replace the Ad Hoc committee.



Decision: The committee agreed to place issue # 3362 (TAC closings) in the parking lot, with the intention of working the issue next year.

Decision: The committee agreed that the TAC closures issue is not related to the mail procedure issue.

Action: Sherry will work with Mary to complete the mail procedures referral. The committee will discuss this issue during their next teleconference meeting.

TIGTA Report-Doug Wilhelm

Doug informed the committee that the report from the Treasury Inspector General for Tax Administration (TIGTA) is still pending.

Doug shared his experience with visiting a local Taxpayer Assistance Center (TAC) where the assistor stated that her office was given a maximum number of tax returns to prepare. The assistor was close to meeting her maximum. Tom related this to the same strategy that IRS uses to limit the use of the ETLA site.

Self-Assessment Report

The committee discussed their yearly self-assessment report. This report contains member feedback on meeting productivity from the year.

Decision: Judi reminded the committee that they have until October 15th to complete their self-assessment. Tom will consolidate the draft and email it to the committee members by September 22nd. Members are expected to reply to Tom (via e-mail) with their input.

TAP Annual Meeting

Action: In order to conserve time, Judi will e-mail the committee members an update on the TAP Annual Meeting.

Committee Business

Doug suggested using an estimated timeline for elevating issues. The starting point for the timeline would be when an issue comes forward. The issue should also be defined before it is researched by the analyst.

Decision: The committee agreed and will review each suggestion on a case-by-case basis.

The committee also discussed a mentoring process for new members. A returning member would work with each new member.

Action: Doug will write a half page narrative on how the mentoring will work. Judi will pair the new members with the returning members.

The committee rescheduled their meeting.

Decision: The new meeting is scheduled for **September 28, 2005 at 10:00 am Pacific time.**

Closing

Tom thanked the members for their hard work and Laurie adjourned the meeting.



**Area 7 Committee Meeting Minutes
Area 7 Committee Meeting
July 28, 2005**

Designated Federal Official

- Judi Nicholas

Attendance

- Cheyanna Jaffke
- Allena Kaplan
- Iris Sosa
- Bruce Twomley
- Sherry Whah
- Doug Wilhelm
- Gil Yanuck

Absent

- Clayton Agena
- Margaret Balcom
- Larry Combs
- Robert Forst
- Howard Perkins

Staff

- Dave Coffman, Analyst
- Marla Ofilas, Note Taker

Opening/Welcome/Announcements

DFO, Judi Nicholas officially opened the meeting. Committee Chair, Tom Karwin welcomed the committee members and stated that TAP analyst, Dave Coffman will be filling in for Mary O'Brien. Allena reviewed the agenda, roll call was taken by Marla and a quorum was met.

Joint Committee Report Out

Tom stated that at the Joint Committee meeting on July 20, four recommendations were approved for elevation to the IRS and one recommendation was returned to the originating committee for additional work. In response to a question about where members could find copies of recommendations, Judi informed the committee that recommendations are posted in the TAPSpeak "Reading Room".

The Joint Committee discussed the definition of a "dropped" issue. Tom feels that the definition could be made clearer in the course of revising the TAP member handbook for the annual meeting.

Tom reported that the Communications Committee is working on the TAP Member Handbook revision, and will provide a draft to the Joint Committee for comments. The committee has also been evaluating the effectiveness of TAPSpeak. Tom encouraged and recommended that members begin using TAPSpeak. Additionally, the Communication Committee is developing a survey for new members regarding their recruitment experience. The Communication Committee is also developing a survey to ascertain taxpayer opinions about their experience with the TAP.



A Joint Committee sub-committee was formed to provide comments and recommendations to Bernie Coston and Nina Olson regarding the TAP Annual meeting. Tom shared the recommendations with the committee.

Doug suggested that a letter should be sent out to the new Area 7 members, inviting them to dinner during the annual meeting. Judi also suggested sending out an advanced "Welcome" email along with an invitation to dinner. Tom also suggested that there should be designated evenings for area and issue committees to meet for dinner.

Action: Judi will forward the suggestion to Bernie.

Report on Active Issues:

- *Issue #3268 IRS Refund Website – Cheyanna Jaffke*
The sub-committee recommends that the IRS provide a link on the "Where's my refund" web page to a new web page called "Am I due a Refund?" On the new page, taxpayers can search by name, city, state and zip code for prior years undelivered or returned refunds. Cheyanna indicated that she will work with Mary to complete the background, research, and analysis portion of the referral. Cheyanna indicated that the summary and conclusion portion was completed during the face-to-face meeting in San Francisco.

Action: Dave will contact Mary for the "Summary and Conclusion."

Correction: Correct referral number from "3280" to "3268".

Decisions: The committee approved the draft referral. Although the committee approved the draft, the committee would like to review the final referral before it is elevated.

- *Issue #3483 Electronic Tax Law Assistance (ETLA Website) – Tom Karwin*
It was agreed that the referral narrative is too long and included notes provided by Tom. Gil will assist Tom with editing the text to produce a more concise referral and expects to have it ready for the next committee meeting. Judi observed that during the June meeting the sub-committee identified data they would like to assist with analyzing the issue.

Action: Judi will meet with Mary to review the research to date and determine what else is needed.

Action/Decision: The referral will return to the sub committee for additional work. The issue will remain in active status.

Judi added that there is a recent report from Treasury Inspector General indicating that the effectiveness of the Taxpayer Assistant Centers cannot be measured.

Action: Dave will post the report on TAPSpeak for the members to read.

Judi suggested the members read the report. The report includes TIGTA's assessment and a response from the IRS regarding TIGTA's assessment.

Decision: The committee concurred with Sherry's recommendation to hold the issue. The issue will remain in active status pending the results of a Congressional decision.



Committee Business

Doug informed the committee that he would be participating in teleconference with TIGTA, along with representatives from each of the other areas, TAP Chair, Gwen Handelman and TAP Director, Bernie Coston. TIGTA requested the meeting to solicit feedback from TAP members on the impact of TAC closures and the impact it would have on their customers.

The next Area 7 conference call is scheduled for August 25th and Judi and Mary will be in a face to face meeting of the Communication Committee. The committee rescheduled the conference call for September 1, 2005 @ 12:30 pm pacific.

Action: Dave will send out an email reminder and correct the federal register notice.

Area 7 Self-Assessment

Tom requested that members use the annual committee self assessment template to provide comments about accomplishments, disappointments, or overall activities. He would like the member's comments via email by August 25, 2005.

Action: The committee will send e-mail comments to Tom by August 25, 2005 and Tom provide a draft document prior to the September 1, 2005 meeting.

Action: Tom will send out a reminder email a week before August 25, 2005.

Tom stated that the committee will have two meetings in September. The committee will try to wrap up their committee business during the September 1st meeting but could use the September 22nd meeting for any unfinished business

Closing

No comments were offered by the members and Judi closed the meeting.

Next meeting

September 1, 2005 @ 12:30 pm Pacific



**Area 7 Committee Meeting Minutes
Area 7 Face-to-Face Committee Meeting
June 30-July 1, 2005
San Francisco, CA**

June 30, 2005

Designated Federal Official

- Laurie Keleman, Local Taxpayer Advocate

Panel Members

- Clayton Agena
- Larry Combs
- Cheyanna Jaffke
- Thomas Karwin, Chair
- Allena Lu
- Iris Sosa
- Sherry Whah
- Douglas Wilhelm
- Gil Yanuck

Members Absent

- Margaret Balcom
- Howard Perkins
- Bruce Twomley

Staff

- Judi Nicholas, TAP Program Manager
- Mary Peterson O'Brien, TAP Analyst
- Marla Ofilas, Note Taker

Guests

- Bernie Coston, TAP Director
- Joe Benton, Area Director for the Taxpayer Advocate Service

Opening/Welcome/Review Agenda/Roll Call

Lauriel opened the meeting. Tom welcomed the members and guests and asked that each person introduce himself or herself. Three guest were in attendance; Bernie Coston, TAP Director; Joe Benton, Area 7 Director for the Taxpayer Advocate Service; and John Tam, Local Taxpayer Advocate from Oakland, CA.

Allena reviewed the agenda.



National Office Update

Bernie provided a brief statement regarding the recruitment of new TAP members. Tap management is in the process of interviewing potential TAP members. It is expected that the selections of new members will be within the next couple of weeks.

The TAP Annual meeting is in the initial stages of planning. The TAP Annual meeting has been scheduled for the first week of November. The meeting has also been extended an additional day. Bernie is hoping the members will be able to meet in their area and issue committees and start working issues.

It is expected that Local Taxpayer Advocates (LTA) as Designated Federal Official (DFO) for the Area Committees will be rotated. Some of the DFO's have been part of TAP since the panel was the Citizens Advocacy Panel.

The TAP staff is working on measures for the TAP program to look at the effectiveness. Nina Olson, National Taxpayer Advocate, is also looking at getting responses on recommendations that have been elevated and getting them on a timely manor. Bernie feels that this is a measure that should be looked at carefully to determine if we are or not doing our jobs. Bernie also feels that TAP has to start proving their worth or the committee will cease to exist. Bernie recommended members should look at the quality of the recommendations and not the number of recommendations that are being elevated.

Bernie announced that he is looking into replacing the Ad Hoc committee with an issue committee. With the closures of the Taxpayer Assistance Centers (TAC), the burden is falling on other entities. VITA has come to TAP and asked to collaborate with them on receiving feedback on various projects that they are doing. Bernie is hoping to create another issue committee to work with VITA and Mark Persley that will take the place of the Ad Hoc committee. Bernie will be meeting with Sue Soltile to discuss this possibility.

Bernie asked the committee if there were any questions.

- Gil indicated that he has been in contact with Area 4 to assist in some of their issues. Bernie welcomed members to participate when an issue presents it's self and a member has interest in being a part of the process. Judi explained that last year, SBSE Payroll Issue committee, also asked for assistance from three members that were already working an issue in their area committee that the issue committee had been charged to do.
- Sherry indicated that she runs a Vita site that assist 500 to 800 people in one day. In addition, Sherry runs a LITC site. Sherry explained that she supports a proposal that the LITC take on tax preparation from the Vita site. Sherry feels that there needs to be another door opened if one is closed. The LITC sites are not allowed to do current year tax preparation but are allowed to do prior year tax preparation. Sherry feels that LITC sites really need to be able to prepare current year taxes if they are going to be assisting taxpayers from Vita. Bernie felt that it would be good to write a recommendation from TAP to Nina Olson, National Taxpayer Advocate.
- Larry asked for clarification regarding the cut back of TAC offices and electronic services. Larry felt the committee could make better recommendations if they understood why the IRS is cutting back both services. Bernie explained that the paperwork reduction act states, by 2006 80% of taxes should be filed electronically. The IRS is not near this point but the IRS is trying to stay the course. By this, the IRS has an obligation to eliminating some of the Taxpayer Assistance Centers (TAC). In addition, the level of expertise is not available at the TAC offices. Bernie asked if Larry was referring to Tele-file being eliminated. Larry explained that he was also referring to the ETLA service. Bernie explained that W&I indicated that the numbers did not justify keeping the program up and operational. There is more emphasis on compliance.



Bernie felt TAP should be the voice of the taxpayers and inform the IRS that there is a need for customer service. Tom also eluted that Nina Olson, National Taxpayer Advocate, had made a point in her testimony that taxpayer services has a positive impact on compliance but yet there is no research to document this. Tom felt that it's difficult to be the conscience of the taxpayer when there are people operating on the assumptions that compliance is really the result of enforcement. Bernie felt that was a great point. Committee continued to discuss customer service and compliance.

Bernie ended that as a result with the TAP meeting with Commissioner Everson in May, the Commissioner has made the obligation to meet with the members of TAP annually and hopefully biannually.

TAS Area 7 Director

Joe Benton thanked the TAP members for their time in volunteering to be a TAP member. Joe felt that it was an important duty, as citizens, to give their time in improving products and services within the IRS.

Administrative Announcements

Judi stated that managers and analyst would be attending Continuing Professional Education from August 1 to August 5. Managers and analyst will not be available that week.

Joint Committee Announcements

Tom presented the highlights from the Joint Committee meeting. The Joint Committee is concern with the operation of TAP, from an administrative point of view. The committee is working on a variety of report formats and content. Each Joint Committee meeting ends with a list of assignments. Tom summarized the list. If members are interested in VITA issues, members are encouraged to participate in the Area 4 sub committee. Tom also explained the role of the newly formed Communication Committee.

Judi provided a brief synopsis of what the Communications Committee is charged with. Judi indicated that the committee is broken into three sub committee, Marketing, Outreach and, Internal. The marketing sub committee will be working on advertising TAP, externally; outreach will be assisting and preparing members with outreach activities; and the internal subcommittee is charged with getting the word out about TAP within the IRS. In addition, the committee will attend a 2nd face-to-face meeting in August to continue working on the multiple action items related to TAP.

Comments from TAP members re: the Tax forum

Gil, Sherry, and Clayton provided comments regarding their opportunity in attending the IRS Tax Forum. The members volunteered to staff a booth and provide information regarding the panel.

Gil explained that the members had several opportunities to attend focus groups and provide frank comments on issues that were presented to them. Gil also felt that the length of each session was too short. The instructors only provided a summery of their subject and due to lack of time, were not able to discuss their subject in depth. Sherry explained that some people still think TAP is TAS. Sherry continued that she had to explain the difference to the participants, multiple times. Clayton agreed with Gil that participating in the focus groups was very interesting.

Tom asked if there was a formal presentation of TAP. Joe explained that during the TAS session, TAP was discussed and the members were introduced to the audience.

Action: Joe suggested that the members should pass out TAP marketing materials to the audience as they exit the auditorium. This would increase the awareness of TAP. The committee, Judi and Bernie agreed and felt it was a great idea.



Guest Speaker – W&I – Discuss TAC customer service – Roslind Kochmanski

The committee met with Roslind Kochmanski, Acting Area Director for the Taxpayer Assistance Centers, via teleconference. Judi welcomed Roslind.

There are currently 400 Taxpayer Assistance Centers (TAC) and 68 of those offices are scheduled to close by October of this year. The majority of the offices and the customers they assist will not be affected by this decision. Although taxpayers may have to travel farther, face-to-face contact will still be provided. Roslind stated that there is an increased use of the telephone for support, increased use of the irs.gov site, and increased use of free file, to file tax returns. Traffic in the TAC offices has declined within the past few years due to taxpayers being directed to use the telephone or the website. In addition, due to the change in the ITIN rules has assisted in the decline in numbers.

The non-continuing sites were determined by five decision points, demographic, geography, workload, facilities cost, and employee cost. At this time, there are bills in Congress asking the IRS not to move forward until everything is reviewed and TIGTA reviews the model that IRS used. IRS will move ahead with the plan until told otherwise. Roslind explained to the members to keep in the back of their mind that things could change.

Roslind opened the presentation to questions. Cheyanna asked to provide a percentage of work and information TAC offices provide, for example, what percent is tax preparation; what percent of work is giving account information; etc. Roslind explained that tax law questions are 8%; accounts work is 4 to 5%; calls 15%; forms 15%; and return prep is 2%. Roslind continued that this will not add up to 100% but the information presented is approximant percentages and that most of the work done in the TAC offices could also be completed on the phone.

Laurie asked if the remaining 50% would be categorized as "Other." Roslind explained that she didn't have all the figures available but would be willing to work with Mary to provide the remaining percentages to her.

Action: Mary will work with Roslind to get the remaining percentages of what type of work is done in the TAC offices.

Cheyanna explained asked if there would be notification at the closed TAC to direct taxpayers of other options available or to the nearest TAC office. Rosalind answered that directions will be provided and the IRS will work with the media to get the word out.

Gil discussed that the Reno office is on the list of offices to close. Gil continued that the TAC office prepared 800 returns during the filing season and was informed that his tax preparation site should be prepared to assist taxpayers when the TAC office closes. Roslind offered to verify the information.

Action: TAP analyst will capture and prepare all questions and email them the list to Roslind.

Doug asked if the percentage of tax law in the TAC offices are time spent or the number of questions. Roslind felt it was the number of time spent but offered to verify the category.

Sherry asked what the criteria were for tax preparation in a TAC office. People are turned away because they do not have an appointment to get their tax returns completed when staff is available and sitting in the office. Roslind explained that appointments are required when a taxpayer needs their returns completed. Roslind felt that she could not explain why a tax assistor was sitting in the office at that time, not willing to help a taxpayer but did feel that the assistor could have been waiting for a taxpayer that did have an appointment. Roslind provided a breakdown of what is expected of all TAC offices. Rosalind suggested that Sherry contact that TAC office if she had any complaints.



Laurie concluded the call and thanked Roslind for participating. Roslind thanked the committee and the call ended.

The committee continued to discuss the closures of the TAC offices.

New Joint Committee Referral Form

TAP Analyst explained that the Joint Committee has produced a new referral form, which is still in draft form, but suggested the committee use it when writing their recommendations. Tom felt it was a good idea since there is information on the form that the IRS would need.

Issue #3363/3492 – Sherry Whah

Sherry recapped the issue to the committee.

Issue #3483 ETLA Website – Tom Karwin

The IRS is trying to have the public use the website and telephone service but yet they are shutting down the ETLA service. Taxpayers email their questions and receive an email response to their questions. Tom explained that the principle argument is that it was lightly used. Tom felt that it was an answerable objection because it was a new service. In the first year of use, there were 150,000 users. In addition, the IRS buried it in their website, which made it hard to find. Tom concluded that the IRS's argument is that the numbers went down in the second year of service to 90,000.

Tom concluded that he would like to make a recommendation to use all possible ways of communication in dealing with taxpayer inquires. Tom feels that with further analysis, ETLA could be refined and expanded. After further discussion, the committee agreed with the recommendation.

Issue #3268 – IRS Refund Website

Larry recapped the issue he's been working on. Larry explained that based on the FOIA (Freedom of Information Act) that the IRS should put taxpayer information on the website if the name, city, state, and zip code is provided prior to receiving the information.

Larry asked if the committee if this issue is worth pursuing since the information is attainable elsewhere. After further discussion, the committee agreed to go forward with the recommendation. Larry agreed to write up the recommendation during the sub committee break out session.

Issue #3444 – Automated Toll-Free Line – Allena Lu

Allena recapped the issue she has been working on. When a taxpayer calls the automated toll-free line, no option is offered to the taxpayer to talk to a customer service representative if there is a problem with the refund. Allena explained that Margaret Balcom suggested giving the taxpayer an option to talk to someone. But, Allena felt that it would take resources to have a person available to answer the call. A second suggestion is to add addition information on the automated refund line to refer callers to the 1040 line and guide them through the correct prompts to speak to a live assistor.

Judi asked if the committee knows why the IRS has chosen not to put an option on the toll free line to speak to an assistor. Mary responded because of the cost. Laurie discussed that in the past, taxpayers went straight to an assistor rather than following the prompts. Allena also explained that people do not want to have to go through a phone tree but instead talk to a live person for help. Laurie suggested the recording could ask the caller; if they are calling regarding their refund press 1; and if you have a problem regarding your refund press 2.

Mary felt that the problem is with the loop that the phone system puts taxpayers in. Mary felt that the problem should be addressed even if the public does not approve of phone trees.



Cheyanna felt that all the issues presented would cost money and the Commissioner explained that there is no money available. Bernie explained that there are projects that already exist with funds put aside. If a recommendation is sent that would directly influence a particular project, with funds set aside, then the IRS could implement the recommendation.

Decision: This issue will be placed on hold until Margaret can be present.

Area 7 Issue Process Sub Committee – Laurie

Laurie reviewed the process of the issue process sub committee and indicated Bob Forst, Margaret Balcom, Mary and herself as the members of the committee. The committee has monthly teleconferences to review the issues that Area 7 receives and to prioritize them. The issues are ranked as high administrative, low and, legislative. When an issue is presented to the committee, Laurie suggested that the ranking be included on the agenda for the teleconference. This is to help the members since the ranking is difficult to locate on the research report. Laurie also suggested that once a recommendation is produced, it be added to the end of the research report.

Action: TAP analyst will include the ranking.

To assist Mary and due to time constraints, Laurie indicated that Mary will only research 4 or 5 issues at a time. Laurie explained that the decision would also assist the members since each issue requires a champion. Laurie pointed out that not all members want to work on more than one issue at one time. Mary felt that the committee should concentrate on a couple of issues until fruition then to have ten issues on the agenda and not being able to get work done.

Laurie continued by reviewing the parking lot issues.

#723

A taxpayer asked if there was a way to change your address over email or by the internet. Currently taxpayers fill out a change of address form with the post office. The post office sends the IRS an electronic transfer of change of addresses, weekly.

The committee felt that a process is in place and dropped the issue.

Decision: Dropped

#2613

Caller always prepares his own taxes, yet he has not receive any forms in the mail this year. Forms are not be found at the post office any more, nor at the library. He has to ask for them to be mailed.

Decision: Dropped

#2771

Practitioner called with suggestion for adding feature to IRS internet site for practitioners to look up estimated tax payments. I did advise caller that this service was available to practitioners who electronically filed which she was, so the suggestion changed to letting practitioners know about this service.

Decision: Parking Lot



#3297

For the last 3 years the caller has experienced an unreasonable delay in ordering IRS publications over the phone. The caller states that she's told the publications would be sent within 10 days, only to receive them months later. Sometimes when she does receive the publications, she receives more copies than she requested. She is not told that an item is on back-order, so she expects it within 10 days. The most recent example of this is when she called 11/22 and requested a Pub. 17. She was told that she should receive it within 10 days. The caller received the publication on 1/7.

Decision: Dropped

#3361

IRS sends envelopes with their correspondence asking for information from the taxpayer. The taxpayer is supposed to use these tiny little envelopes. These envelopes are more time than not inadequate and a waste of taxpayer money to print and send. My recommendation would be to A. Send an envelope big enough for the information requested, or B. Don't not send at all.

Decision: Dropped

New issues to prioritize

#3364 & #3379

Why isn't the IRS consistent when rounding income? I don't like getting letters asking why there is a discrepancy when I have rounded up or down and the IRS does just the opposite. It is hard enough for small business owners.

Decision: The committee decided to combine all both issues together and make a medium priority.

Champion: Not decided.

#3378

Taxpayers often pay more than they should due to the Form 1040 instructions. The Form 1040 instruction state that the taxpayer must use the tax rate table for a certain amount of income instead of using the tax rate schedule. This often results in taxpayers paying 2 to 4 dollars more than they should.

Decision: Dropped, the committee did not feel this was an issue since the directions is provided in the Form 1040 instructions.

#3445

As far as easing small business payroll burden, what I mostly see involves owners starting to get successful and needing to hire employees. The owners have no knowledge of payroll tax law and normally make several mistakes in their first two years as employers. Rather than a CPA coming to their aid after they ran afoul, it would be great if there was a proactive way of assisting the new employer when he first comes online.

I would like to see a section of the IRS web devoted to new payroll filers. Complete with suggestions, answers to frequently asked questions, blank forms, and allowance for emails...whatever your group deems the more burdensome. Employers first requesting an id # should be given a payroll flyer regarding this site. RRA'98 states the IRS is to help its customer (the taxpayer) understand and only pay the tax owed. I can think of no better start.

Decision: Dropped, The committee felt the information is readily available.



#3491

Caller has written to IRS asking for a fee schedule for IRS rulings. There is about two-month turnaround time for the schedule to be mailed back to the requestor. Caller is suggesting a much quicker method of getting this fee schedule. He is suggesting that IRS have a phone # dedicated for rulings. Currently, caller send his requests to: IRS, Associate Chief Counsel (Technical), Attn: CC:IND-F, Room 6545, 1111 Constitution Ave, Washington DC 20224.

Decision: The committee dropped the issue since the information is available.

#3503

Offer in Compromise (OIC) Program service "still needs improvement" according to this citizen. Citizen suggests that the IRS employees "look at the information that is submitted to them in the original package before requesting additional information." In this citizen's experience, time was wasted in her having to re-submit the data that was already submitted in the first place and as a result her offer was rejected and now she has to start all over again.

Decision: Committee will want to see when 940ez comes out. Mary will continue research and committee will discuss during next meeting.

#3552

Estate planning attorney has attempted to use the SS4 on line application for Employer Identification Numbers for the last few years. In all the times she has attempted to use the site she has only had one application accepted. Filing the form for a identification number for an estate is atypical reason for using the application so not all the fields apply. Her experience completing the form has been that after submitting the application, she receives a message saying, submission not accepted there is an error on the form. The message does not indicate where the error occurred and you are not returned to the information you have already input. There are no directions on how to proceed so you have to start over with a blank form and re-input the information.

I have a side note. I just applied for an EIN number for banking purposes only and had a similar experience. There may be a way to get back to the information you just input but I couldn't figure it out. Applying for a number for "banking only " is another atypical use of the form and I finally was successful in submitting the application by entering either n/a or none so there were no blank fields. But, there are no directions instructing the user to do so.

Decision: Mary will do additional research and bring to the issue process subcommittee. Sherry may want to champion. Discuss during next area 7 meeting.

Issue Process is Working

Tom asked the committee for their feelings regarding the issue process. Cheyanna felt that the sub committee should empower the sub committee to decide if an issue should be dropped. This would free up time to work the real issues that would be presented to the committee as a whole. Cheyanna did not feel that it was necessary for the sub committee to meet and rate the issues, while having to bring the issues to the full committee to rate them again. Tom explained that the sub committee is allowed to make a motion but should not be allowed to make a decision for the entire committee.

The committee continued to discuss the process. **Decision:** The committee decided that the sub committee will continue meeting and prioritizing issue. The sub committee will also provide motions of all issues prior to the teleconferences for the committees review. During the teleconference, the committee will come to a consensus regarding the recommendation and only discuss the issues that a member feels he or she could champion.



Outreach workshop

Gil provided a presentation on conducting outreach. Gil explained that that he is in the Communication Committee. In that committee, he is in the outreach sub committee that is charged with working on ways to assist TAP members to participate and prepare them for outreach activities. Gil reviewed his power point presentation and list of prepared success TAP stories. The list of success stories are a list of issues that has been elevated to the IRS and implemented by the IRS. Gil also discussed ways of contacting the media whether it's television or newspaper. Gil felt a catchy phrase is needed to attract the media's attention. Gil also advised that members shouldn't wait until the Treasury press release to contact the media. Gil explained that time was wasted when work could have been done.

Action: Bernie will get a copy of 2004/05 Treasury's press release.

Gil also indicated that members should use the power point presentation as "Speaker Notes." Gil felt that the presentation is busy and overdone. Gil concluded that the outreach kit should encourage outreach since all materials will be readily available.

Work Sessions

For the remainder of the day, the committee broke up into sub groups to work on writing their recommendations.

At the end of the day, the committee rejoined to review the agenda for day two. Tom closed the meeting.

July 1, 2005

Designated Federal Official

- Laurie Keleman, Local Taxpayer Advocate

Panel Members

- Clayton Agena
- Larry Combs
- Cheyanna Jaffke
- Thomas Karwin, Chair
- Allena Lu
- Iris Sosa
- Sherry Whah
- Douglas Wilhelm
- Gil Yanuck

Members Absent

- Margaret Balcom
- Howard Perkins
- Bruce Twomley



Staff

- Judi Nicholas, TAP Program Manager
- Mary Peterson O'Brien, TAP Analyst
- Marla Ofilas, Note Taker

Welcome/Review Agenda

Laurie opened the 2nd day of the Area 7 meeting. Allena reviewed the agenda.

Announcements

Judi explained that the last Area 7 meeting would be in September. The TAP Annual meeting has been set for November 2, 3, 4 and, 5 2005. Judi explained that there would be no meetings in October due to preparations for the annual meeting. In addition, the meeting will be extended to provide a full day meeting for the Area and Issue Committees.

Issue Report Outs

Tom explained that once Area 7 committee members approves the recommendation that each sub committee worked on in day one, the recommendation will be elevated and presented to the Joint Committee in September during their face-to-face meeting.

Issue # 3268

Tom asked Larry to provide a report out on his issue #3268. Larry explained that Cheyanna, Mary and Iris was part of the sub committee. Larry continued that the committee drafted a referral form and the completed drafted will be ready prior to the next committee meeting. Tom felt that if the referral could be presented to the Joint Committee in August, rather than September, if draft is completed by July. Judi agreed and felt that the committee did not need to wait until September.

Mary explained that a flow chart will be included in the recommendation to show how the website could be designed for taxpayers to access their refund amount.

Issue #3363 and #3492

Tom asked Sherry to provide a report out. Sherry read the summary of the description the committee had decided on.

"With the Taxpayer Assistance closure, elimination, reduction in services the IRS needs to find ways to continue to maintain top quality service and meet their obligations as presented in the mission statement. "

Sherry continued to describe what she would be putting in her recommendation. Sherry is hoping to include a recommendation that the IRS provide a pamphlet to taxpayers that would explain where they could go for assistance. Sherry is also hoping to receive additional information from Roslind to complete her recommendation.

Judi explained that Mary would be able to assist with the language of the recommendation to convey what the committee wants. Sherry concluded that she will have a draft prepared prior to the next meeting.

Issue # 3483

Tom reported that the committee felt it need additional information to proceed with a recommendation. The committee outlined a series of inquires that was need in order to proceed. For example, information regarding the current volume in Toll Free telephone service. Tom felt that the information that is received from Roslind could also be used for this issue.



Decision: Mary scheduled a conference call to continue working with the sub committee on this issue.

Self-Assessment Discussion

Judi explained that yearly, each committee prepares a self-assessment. The report is a compiled list of what the committee did through out the year and a list of accomplishments and disappointments. Judi explained that the committee shouldn't limit their accomplishments to the number of recommendations that was elevated to the Joint Committee.

Decision: The committee will, each fill out the self-assessment and email it to Mary.

Next Steps

The committee will continue working on their draft referral and present it during the next meeting in July. All self-assessment comments are due to may by July 15th and will be discussed on the July 28th conference call.

Comments

Tom asked if there were additional comments. Allena suggested that the time allotted for each agenda item be added to the agenda. Action: All agreed and Mary will add time limit to the July's meeting agenda. Allena also asked if the committee felt comfortable with her warning of time spent during each discussion.

Decision: The committee agreed and will be continued in future meetings.

Each member provided an assessment. All felt the meeting ran smoothly and also felt it was a good meeting. Doug suggested that the committee have a meeting in December, after the annual meeting, and not wait until January. All agreed.

Tom thanked everyone for their hard work and participating in the committees first and only face-to-face meeting.

Laurie adjourned the meeting.

Next meeting is scheduled for July 28, 2005.



**Area 7 Committee Meeting Minutes
Area 7 Committee
May 26, 2005**

Designated Federal Official:

- Laurie Keleman, Local Taxpayer Advocate, Los Angeles, CA

Committee Members Present:

- Clayton Agena, HI
- Margaret Balcom, CA
- Larry Combs, CA
- Cheyanna Jaffke, CA
- Tom Karwin, CA (Chair)
- Allena Lu, CA (Vice-Chair)
- Iris Sosa, CA
- Bruce Twomley, AK
- Sherry Whah, AK
- Gil Yanuck, NV

Committee Members Absent/Excused:

- Robert Forst, CA
- Howard Perkins, CA
- David Robinson, CA
- Doug Wilhelm, CA

TAP Staff:

- Dave Coffman, Note taker
- Mary O'Brien, Program Analyst

Opening

Laurie opened the meeting.

Welcome/Announcements

Tom welcomed everyone to the meeting.

Review Agenda/Facilitation of Meeting

Allena reviewed the agenda and asked Tom to give a brief update on issue # 3492.

Roll Call

Mary took roll call. A quorum was met.

Joint Committee Report Out

Tom reported on the face-to-face Joint Committee meeting held in Chicago on May 14, 2005. He noted that virtually everyone endorsed having a face-to-face meeting to ensure productivity and expressed regret that TAP had to reduce the number of face-to-face meetings this year. Tom also commented on the following topics that were discussed during the Joint Committee meeting:



- *Recruitment Efforts* – TAP applicants will be interviewed by telephone between June 15 and June 23, 2005. This year, TAP will not be interviewing applicants in person. An e-mail was sent soliciting for interested TAP members to help with interviewing. Interested members should respond to that e-mail.
- *Tax Forums* -- Tom noted the different tax forum locations. The tax forum which falls under Area 7's responsibility will be held in San Francisco.
- *Annual Meeting* – The TAP annual meeting has been scheduled for November 2 through November 5, 2005. Details will be forthcoming.
- *TAP Delegation Meeting with the Commissioner* – A delegation of TAP members, led by TAP Chair, Gwen Handelman, met with Commissioner Everson last Friday.
- *National Office Report* – Bernie Coston, TAP Director, noted that the National Taxpayer Advocate (NTA) has suggested that TAP should not spend a lot of time reviewing issues that have already been addressed in the NTA's Report to Congress. While TAP is free to study anything it wishes to study, issues that have already been addressed by the NTA shouldn't be given a high priority in TAP. TAP should focus on improving customer services rather than operational issues of the IRS.
- *Volunteer Income Tax Assistance (VITA) Program* – A subcommittee of Area 4 is working on issues related to the VITA program. There were suggestions that other area committees should not initiate studies on VITA. TAP members that have an interest in the VITA program are welcome to attend this subcommittee's meetings. The staff can provide contact information. Mary noted that if anyone is interested in what this subcommittee is working on, she can summarize their efforts and send the member a short paragraph.
- *Issue Tracking* – There's been a considerable effort to "clean-up" the statuses of issues raised last year. In some cases the IRS has not responded or they have not responded in a clear manner. Several recommendations that have gone forward from TAP have had several parts to the recommendation. As a result, the IRS might respond differently to these "sub-recommendations". This confuses the tracking of each issue. The Joint Committee is now working on submitting separate recommendations for an issue instead of just one recommendation for several different suggestions. This will facilitate adoption of the recommendation and ensure an IRS response.
- *Joint Committee Recommendations* – The Joint Committee discussed five different recommendations that were brought to the IRS. One such recommendation was that the TAP should have a different name. "Taxpayer Advocacy Panel" is too often confused with "Taxpayer Advocacy Service". This suggestion was rejected by IRS. Other recommendations were to be submitted to different parts of the IRS.
- *Area Committee Recommendations* – The Joint Committee reviewed five new recommendations that came forward from area committees. In four of the cases the recommendations were either deferred or referred back to the area committee for additional work. One had to do with the authority of the Taxpayer Advocacy Service to release levies. This recommendation was approved and was authored by Bruce Twomley of Area 7. Bruce commented that Nan Wilson of Area 5 and Sandy McQuin of the Milwaukee TAP office provided reinforcement on this issue. Timing of this issue was key and it proved to be a great experience. Tom noted that, in developing this recommendation, proposed criteria for TAP recommendations was issued by the Office of Taxpayer Burden Reduction. A subcommittee was formed to review the proposed criteria.

- *Operational Details* – There was a discussion of various operational details, specifically the monthly reports by committees, the structure of the list of TAP issues and the annual report. There was also a review of assignments for the Communications committee, which was recently formed. The Communications committee is working with the TAP staff on a revision of the TAP handbook. A draft of this revised version will be distributed to Joint Committee members for comments. The Communications committee is also doing a study on video conferencing as a way of supplementing audio conferences without incurring the cost of the face-to-face meetings. Other studies by the Communications committee include “What’s on TAP?” reviewing the database listing TAP issues and their status, speaker report form and TAP recruiting process.

Tom emphasized the value of face-to-face meetings.

New Issue:

- **#3843 Electronic Tax Law Assistance (ETLA) Website**
Margaret reported that she tried to go on the IRS website to find the ETLA section. It is extremely difficult to find this information. One method she tried was to type “ETLA” into the search engine, but many taxpayers may not know to do this. This is an issue that Area 7 should work. Margaret asked if any other members tried to find this information on the website. Bruce stated that he failed to find the ETLA section. Gil remarked that, to the uninformed, they may have a difficult time trying to find the section.

Gil explained that one must realize which way the “wind is blowing” right now. During the Communications meeting, Gil had the opportunity to meet with IRS staff. After listening to information on the IRS budget and where the priority is within the Service, trying to get more staff to respond to online questions is not going to happen. They placed ETLA in a much less prominent position of exactly what the research paper shows so that people don’t use it. With every dollar that Commissioner Everson gets he hires Revenue Agents because that’s what collects money. Convincing the IRS to place ETLA in a more prominent place, so more people can use it and more staff will be needed to maintain it would simply not happen.

Larry agreed with Gil but noted, from the meeting with Commissioner Everson, that the budget will be cut more and those cuts will affect services because the IRS must enhance revenue. The Commissioner invited TAP leadership to meet with him a couple times a year to discuss things. If this issue was developed with some good arguments, this could be presented to the Commissioner on a cost-benefit basis. Right now, there’s a situation, based on the report, the IRS had a great program. With cutbacks, this program started to fail. Instead of the IRS letting the program fail, it was removed from proper operation instead of improving it. Larry noted that this is a good way of keeping taxpayers informed, encouraging them to pay their taxes.

Laurie stated that a website with questions and answers on different topics may help taxpayers review the questions and answers and help them to find answers to their tax questions.

Tom commented that the subject of ETLA was mentioned in the National Taxpayer Advocate’s Report to Congress. She indicated “The system is designed to allow employees to pool responses from the database of pre-written answers and thus save time researching and responding to frequently asked questions.”

Margaret agreed that questions which can be answered with a “canned” answer may be answered immediately. Those that can’t be answered immediately would require a staff person to research and then respond on an e-mail by e-mail basis.



Tom reminded the committee what Bernie Coston suggested during the Joint Committee meeting that TAP should not address issues that have already been addressed by the National Taxpayer Advocate. The NTA concluded that "Although internet-based assistance should not be the sole or even primary means of providing tax law assistance, ETLA is still very useful." The savings of eliminating ETLA is only about \$1.5 million.

Mary noted that the tactic is more about usability instead of elimination.

Bruce added that maybe the NTA would like to be reinforced with a resolution from TAP. Maybe a quick question through Bernie would give better insight on if the NTA would welcome support for this issue.

Action: Mary will contact TAP Director Bernie Coston for guidance on whether or not Area 7 should continue to work this issue.

Decision: If Bernie agrees that this is an issue Area 7 should work, Mary will place the issue on the next agenda.

Existing Issue:

- **#3492 2005 Budget and Effect on TAC Customer Service**
Allena asked Larry to summarize the meeting that took place between a small group of TAP members and Commissioner Everson.

Larry summarized the meeting by stating that it was a positive but firm "No, we're not going to spend more money on services, we simply don't have the money and we need to devote our efforts to collecting revenue." The meeting was positive from the point of view that Commissioner Everson would like to have better and more direct communication with TAP. He invited the TAP leadership to meet with him twice a year. The Commissioner explained to TAP that he sought advice from IRSAAC and discussed the proposal with them, asking for their opinion. The reality of this issue is that the Commissioner will not spend more money on services at this time.

Larry continued that, while pursuing this issue may be fruitless, that doesn't mean the committee shouldn't make an effort for the benefit of the taxpayers.

Allena suggested taking an approach to looking for cost-effective alternatives. Tom commented that the panel should not limit recommendations to things that are likely to be approved. The focus should be on the appropriate way to strengthen taxpayer services. Allena noted that TAP should also be realistic about the budget. Tom encouraged using a cost-benefit strategy. Gil added that there are other issues the area can tackle, knowing that some of the issues can result in IRS changes, instead of trying to persuade the IRS change something that the Commissioner won't adopt.

Sherry suggested that while the Commissioner won't adopt a recommendation to improve Taxpayer Assistance Center access, maybe the committee should explore and suggest other alternatives to providing the same services to taxpayers without the cost. Gil noted that the Commissioner is requesting that VITA and TCE to increase their efforts to continue service to taxpayers affected by TAC closures.

Mary added that the IRS does not know how they're going to implement this yet. Also, Area 4 is working on VITA, so any suggestions involving VITA should be directed to Area 4. Area 5 is working on a recommendation for TAC too. Other TAP committees are working on these issues.



Allena said that any suggestion will need to reflect little or no cost. Mary asked the committee to consider the kind of workload that volunteer services can actually handle. Gil said that it depends on the training received by the volunteer. Would they be able to beat the 64% accuracy rate of ETLA (as referenced from the research report)?

Sherry asked the committee to focus on the options that are available to TAC users and ask the IRS to develop methods to direct these users to other means of finding their answers. Allena noted that, while TAP is here to help everyone, the IRS has an emphasis on revenue. They may tend to help low-income taxpayers less and audit high-income taxpayers more. Tom added that this doesn't always follow the logic of the IRS. Sometimes the performance of the IRS is measured by the number of returns audited and not the amount of money generated from an audit. Tom has seen it suggested that the IRS has a bias toward taxpayers claiming earned income tax credit, justifying a large number of fraud. Tom was reminded that the earned income tax credit is also the number one area of fraud. Tom said that earned income tax credit claims may rank the highest in number of errors, but it isn't necessarily the highest in fraud. It may be the result of low-income, under-educated people with limited English speaking ability making errors in their application. This is a political football which the congress people like to call every error "fraud", which is not accurate.

TAP Analyst noted that this issue came from the Wage & Investment (W&I) division in their quest of trying to figure out their budget. The TAP Staff is also working on a guest speaker from Wage and Investment Operating Division to speak on this issue at the next Area 7 face-to-face meeting. There are two other committees working on similar issues.

Decision: Everyone agreed that this issue should be brought before the TAP Director to ensure Area 7 is not duplicating work.

Action: TAP Analyst will discuss working this issue with the TAP Director.

San Francisco Face-to-Face Meeting

Tom asked for an update on Area 7 members staffing the Tax Forum booth. Mary noted that Gil, Clayton, Sherry and Margaret offered to help staff the booth. The booth is set up on Monday night and is staffed on Tuesday and Wednesday.

Tom asked those staffing the booth to share their experiences (through a report from the group's spokesperson) with the rest of the committee.

Issues to be addressed in the face-to-face meeting include issues # 3483 and #3492 with information from Mary and the possibility of representatives from W&I to speak to Area 7 about these issues.

Tom hoped that Area 7 could shape their study of these issues in such a way as to avoid duplication of work by the National Taxpayer Advocate. Special attention should be made to Larry's cost-benefit review. This would be more specific than saying, "We're in favor of taxpayer service." Tom read a portion of the Commissioner's statement "We have also continued to improve our telephone service for the taxpayers who call the IRS with questions." This is a comparison of the toll-free telephone services versus the internet-based e-mail services, recognizing that more people have access to the telephone than the internet. Nevertheless, there's a certain efficiency in dealing with a database of answers that already exist.

Allena suggested placing outreach activities on the agenda (challenges, experiences, etc.). Sherry said that there were some issues carried over from the last meeting. Mary added that there were three other active issues to work during the face-to-face meeting, Mail Procedures at Taxpayer Walk-in Offices, IRS Refund Website, Automated Refund Toll-free Line. There are champions for each of these issues and the champions will need to work with Mary prior to the face-to-face meeting.



Tom has been working with Mary on an agenda. A draft will be forwarded to all members for comments.

Cheyanna asked if there will be another teleconference before the face-to-face meeting. Tom responded that the face-to-face meeting is the next meeting. There will not be a meeting teleconference before then.

Action: TAP Analyst will send an e-mail message, letting everyone know that the meeting originally scheduled for June 23rd has been cancelled.

Outreach:

Tom encouraged everyone to continue to send their outreach activity reports to Mary and invited the members to share any unusually interesting outreach activities since the last meeting.

Gil reported that he was written up in the Nevada AARP monthly bulletin about being related to TAP. Even though Gil is on the communications committee, he commented on the poor job the TAP has done in getting the word out about people on the panel, whether the panel members are seasoned individuals or whether they're new to TAP. Gil also noted that the communications committee is working on preparing an "outreach kit." Mary explained that the outreach kit is the same one that Area 7 worked last year.

Gil also explained a discussion the communications committee had on TAPSpeak. Not many people use TAPSpeak, because users with AOL have great difficulty getting into TAPSpeak. Also, TAP speak has not been kept up-to-date. A recommendation from the communications committee is, instead of having all managers and staff use e-mails, they would use TAPSpeak. Gil asked for input from the group. Area 7 members should send him input in e-mail format. Please send him an e-mail with your input.

Mary suggested this topic be added to the meeting agenda. Gil asked for an evaluation from the group and not waste too much time on this. Tom asked everyone to take a look at TAPSpeak and discuss it in the face-to-face meeting.

Larry asked Gil to send a list of "90 things". Gil agreed to send this to the committee. He has referenced those items in the TAP Annual Report that were elevated.

Allena said that Gil will need his input in about 3 weeks, before the face-to-face meeting. She recommended that the committee look at TAPSpeak before then and e-mail responses to Gil.

Action: Gil will send the list of "90 things" to the committee.

Action: Area 7 members will look at TAPSpeak and e-mail their responses to Gil. TAP Analyst will send out a reminder to all committee members.

Tom mentioned that he met the local editor of a business newspaper and took advantage of that opportunity to send information about TAP to the editor. When the editor learned that the appointments were made last November, she lost interest. Tom expressed his disappointment that the ongoing work of the committee is not as newsworthy as the appointments.

End of Meeting Assessment:

No verbal assessments were made.

TAP Analyst noted that she will be sending the assessment form to the committee.



Action: TAP Analyst will send the assessment form to the committee.

Closing:

Laurie closed the meeting



**Area 7 Committee Meeting Minutes
Area 7 Committee
April 28, 2005**

Committee Members Present (These attendees count for quorum)

- Larry Combs, Yuba City, CA
- Bob Forst, Encino, CA
- Cheyanna, Jaffke, Placentia, CA
- Tom Karwin, Area 7 Chair, Santa Cruz, CA
- Allena Lu, Area 7 Vice-Chair, Anaheim, CA
- Howard Perkins, Suisun City, CA
- Dave Robinson, San Francisco, CA
- Iris Sosa, Fontana, CA
- Dave Terrazas, Santa Cruz, CA
- Bruce Twomely, Juneau, AK
- Doug Wilhelm, Carmel-by-the-Sea, CA
- Sherry Whah, Anchorage, AK
- Gil Yanuck, Carson City, NV

Committee Members Absent

- Mary O'Brien, Program Analyst, Seattle, WA
- Margaret Balcomb, Concord, CA

TAP Staff

- Judi Nicholas, TAP Manager, Seattle, WA
- Laurie Keleman, DFO, Los Angeles, CA
- Dave Coffman, Program Analyst, Seattle, WA
- LaVerne Walker, Secretary, Washington DC

Other Attendees

- None

Welcome

Tom welcomed everyone and Allena reviewed the agenda.

Chair Report

Tom discussed the letter that Gwen sent to the Commissioner. All members were encouraged to read the letter. Some members wished that they had an opportunity to offer input to the letter. It was later stated that there was not a lot of time to solicit input due to the fact that Commissioner Everson was rolling out the closures of seven centers on April 29th.

Tom asked Judi how Nina felt about the closures. Judi stated that Nina was on record as stating that the IRS had not researched the issue of closing centers very well before going through with it. Nina also talks about the issue in her Report to Congress on Earned Income Tax Credit.



Judi stated that some of the proposed closings were for 2006 and that there is room for TAP to provide comments. Tom stated that as individuals they could approach their perspective members of Congress with the issue. Lori wanted to send letters to Treasury regarding the issue. Judi asked if they wanted to take this issue on as something Area 7 could work, but cautioned that other areas are already working on similar issues.

Agenda Items

- **#3280, TAS Authority to Release Levies – Bruce Twomley**
Bruce stated that he had sent everyone a copy for the forum he wrote on this issue. He apologized for sending it to everyone so late. Most committee members had not reviewed the document. Bruce stated that he was open to comments on this issue. He also stated that there were still automated levies but they have been taken out of TAS and have to go through centers to get them released. LTA has had problems finding someone to release levies. New procedures have done irrevocable to taxpayers. If automated levies can be brought back it would lessen harm to taxpayers.

Dave Robinson had a question regarding page 4, last paragraph of the document. Bruce stated that he received that information from the Alaska LTA that the Commissioner was the decision maker for this issue.

Laurie stated that she has employees in Los Angeles that have not had problems getting levies released.

Action: Bruce stated that he would make edits to the document before sending it forward. A decision was made that committee members would have a chance to review it.

- **#3363, Mail procedures at Taxpayer Walk-In Offices – Sherry Whah**
Walk-In Offices falls in line with customer service issue. She would like to combine this issue with other issues. Allena will work with Sherry on this issue. Judi stated the Margaret may also be interested in this issue. The will all three co-chair this issue.
- **#3268, IRS Refund Website - Larry Combs**
Larry asked that this issue be placed on hold until the Area 7 TAP analyst could also be on the call.
- **#3444, Automated Refund Toll-free Line – Margaret Balcomb**
#3492, 2005 Budget and effect on TAC customer service and locations – Margaret Balcomb

Action: Since Margaret is not available to be on the call, Issue #3444 and #2492 will be placed on the agenda for the next meeting.

Outreach – Tom Karwin

Tom asked committee members to make sure they completed and turned in Outreach forms.

San Francisco Face-to-Face Meeting – Tom Karwin

The Area 7 Face-to-Face meeting will be in San Francisco.

Tap Analyst is working on getting the Deputy National Tax Advocate (DN TA) to speak at the meeting. At that time he may be able to provide an update regarding IRS services. The TAP Staff will also find a subject matter expert to speak to the group about IRS walk-in offices. Allena asked that "Challenges During Outreach and Solutions" be added to the Face-to-Face agenda. Tom stated that he would be working with TAP Analyst on the agenda when she returned to the office.

**Outreach**

Panel members report out on outreach activities. Chairs and analyst should use to this to reconcile with speaker report.

Joint Committee Report

Tom will submit the Joint Committee assignments by e-mail to all Area 7 Committee members.

Closing/Assessment

Laurie adjourned the meeting.



**Area 7 Committee Meeting Minutes
Area 7 Committee
March 24, 2005**

Attendees:

- Clayton Agena
- Margaret Balcom
- Larry Combs
- Robert Forst
- Cheyanna Jaffke
- Thomas Karwin
- Allena Lu
- Judi Nicholas, Designated Federal Official
- Iris Sosa
- Bruce Twomley
- Sherry Whah
- Doug Wilhelm
- Gil Yanuck

Staff

- Mary Peterson O'Brien, Analyst
- Marla Ofilas, Note Taker

Welcome/Announcements/Review Agenda

Tom welcomed the members. The recruitment process responses have been forwarded to the joint committee. To help recruit members for the next application period, Tom asked members to discuss recruitment with their contacts.

Tom reminded the members to contact Marla with their travel information to San Francisco. In addition, to contact the hotel to secure their lodging by March 31.

Allena reviewed the agenda. The roll was taken and a quorum was met.

Announcements by TAP Manager

Members should have received their business cards with the exceptions of one misprint. The analyst that is handling the business cards is on vacation; therefore, it is not known what the period is for reprints.

Members will be provided talking points for recruitment as well as the application. During outreaches, all members should encourage people to apply. The application period is from April 1 to April 29. The goal is to have the applications ranked by the end of May and begin interviews in June. In addition, phone interviews will be conducted instead of in person to conserve costs and to ensure that TAP funds go to committee face-to-face meetings.

Joint Committee Report

All members should have received the TAP Annual Report. The Joint Committee is now requesting suggestions on who, outside of the IRS, should receive paper copies or a web link to the online version of the annual report. (www.improveirs.org). A supply of hard copies is available at each office.



Action: Committee members will send their suggestions on TAP Annual Report recipients to TAP analyst.

The Joint Committee has asked that speaker reports be prepared by the first of the month so they could be included with the Area Committee's monthly report.

Decision: Tom suggested that once a month the outreach report is updated rather than each time someone attends an outreach event. The committee agreed to send individual Outreaches to Mary by close of business on the last day of the month.

The Joint Committee is worked on tracking issues. Once an issue is elevated to the IRS, it is important to track what happens to them. The Joint Committee has established an issue tracking sub-committee chaired by Larry Combs. Other members of the sub-committee include Ed Hanna, Leslie Malcomson, and Sherry Whah. Once the committee has a chance to meet, they will be responsible to review the three current tracking reports, The Area Recommendation Status Reports, Recommendation Index, and the Summary of Recommendations for a possible consolidation. This to assist the Joint Committee track issues on without additional paperwork or reports. The sub-committee will be reporting to the Joint Committee meeting during their face-to-face meeting in May.

Tom stated that the Joint Committee would welcome any suggestions that members might have to make.

Meeting Satisfaction Preferences

Tom discussed members providing feedback on meeting satisfaction preferences. The Joint Committee sends out a survey immediately after the meeting with a request that members respond to it by email. This process saves time during the conference call, enables the members to think about their reaction and comments to the meeting, and felt that members would be more open to commenting on email rather than providing input during the meeting. Tom also suggested that time could be save at the end of the meeting for comments and suggestion with out doing a roll call.

Decision: The committee decided that they would invite comments at the end of each meeting only if someone has something they want to share. In addition, each member will email the TAP Analyst a meeting satisfaction survey if he or she has any additional comments to make.

Annual Report Dissemination

Tom reviewed what was discussed during the Joint Committee report out. What groups should members send the annual report to as well as how?

Existing Active Issues

- **#3280, TAS Authority to Release IRS Levies**
Bruce reviewed the written recommendation and the reasoning behind the recommendation. The committee discussed the merits of changing the TAS procedures.

Decision: Bruce will work with TAP Analyst to complete the additional analysis.

- **#3363 Mail procedures at Taxpayer Walk In Office**
Sherry gave a synopsis of her conversation with IRS SB/SE area director. This issue will be placed on hold pending the outcome of an upcoming May meeting with SB/SE executives on process.



- **#3268 IRS Refund Website**

Larry provided an update on the existing issue. Larry clarified that the issue was to simplify the process on the IRS website so a taxpayer could answer non-tax questions in order to find out if they would be receiving a refund. The committee discussed other sites that provide you with refund information by submitting your name and state you live in. Larry would like to see that same ability on the IRS refund site. Staff discussed some of the potential problems that the IRS may have in implementation.

Decision: Larry will work with TAP Analyst on more research and a possible Joint Committee Recommendation.

New Issues:

- **#3444 Automated Refund Toll-Free Line**

Margaret reviewed the issue. The Refund Toll-Free number does not allow a taxpayer to speak with a live person when he or she has a problem with their account. Depending on the menu options, a taxpayer could be sent through the same system and ultimately be routed in a cycle.

TAP Analyst stated that when a taxpayer calls the 1040 line and select information on refund, the taxpayer would be routed back to the refund toll-free line rather than to a live person. The taxpayer would have to select another option to speak to customer service but the toll-free line does not provide that option at the beginning of the call.

The committee discussed several options.

1. Let the taxpayer select option one and have the call routed to speak to customer service. Mary felt this would involve a cost.
2. Provide additional information on the refund toll-free line so that when they call the 1040 line, the taxpayer will pick the correct menu option.

Mary also explained that she has requested a copy of the phone tree and script.

Decision: Margaret has agreed to continue working this issue with TAP Analyst. The committee will revisit this issue later. TAP analyst will research for the copy of the phone tree and script.

Outreach/Committee Business

Gil informed Judi and the members not to print out the TAP application. The application consists of the corrections that were made. **Action:** The support staff will mail out a hard copy of the application to all the Area 7 members.

Tom continued by welcoming members to discuss recent outreach activities. The members provided a brief description.

Tom explained that TAP representatives would be needed to the IRS Tax Forum. Tom asked Mary if she could explain what the participation would involve. Judi explained for Mary that TAP is seeking two Area 7 members to staff a booth and talk with participants, of the Tax Forum. The commitment would entail all day Tuesday, June 28 and Wednesday, June 29. Judi continued to explain who the audiences are. Judi also explained that this would be a good outreach opportunity to get the word out about TAP. In addition, help explain the difference between Taxpayer Advocate Service and Taxpayer Advocacy Panel. Sherry also explained that she has participated at the IRS Tax Forum in the past. Sherry felt it was a great opportunity to talk about TAP.



Decision: Margaret, Sherry, Gil and Clayton have volunteered to represent TAP at the tax forum in San Francisco.

Tom discussed meeting durations. Tom felt that the teleconferences should be extended from one hour to 90 minutes. This would help the members be prepared to participate on the call for an extended amount of time even if the call ended early.

Allena felt that a lot of the meeting time is focused on discussing existing active issues and new issues. Allena suggested that a section at the bottom of the research report should include current status of the report and inform the members what will need to be decided on during the meetings. This will help keep the committee focused. Tom agreed.

Decision: TAP Analyst will provide the status on each research report.

Decision: The committee agreed to extend duration of the teleconferences.

End of Meeting Assessment

Tom welcomed members to provide an assessment of the meeting. Bruce expressed that he is pleased with how Tom moves the meeting along.

Judi closed the meeting.



**Area 7 Committee Meeting Minutes
Area 7 Committee
February 24, 2005**

Attendees:

- Clayton Agena
- Margaret Balcom
- Larry Combs
- Robert Forst
- Thomas Karwin, Chair
- Laurie Keleman, Designated Federal Official
- Allena Lu, Vice Chair
- Howard Perkins
- David Robinson
- Iris Sosa
- David Terrazas
- Bruce Twomley
- Sherry Whah
- Douglas Wilhelm
- Gil Yanuck

Staff

- Mary Peterson O'Brien, Analyst
- Marla Ofilas, Note Taker

Opening/Welcome/Announcements/Review Agenda

Laurie officially opened the meeting and Tom welcomed the members. Allena reviewed the agenda and Marla took roll. A quorum was met. Tom welcomed the new members, Clayton Agena, Bruce Twomley, Sherry Whah and Gil Yanuck, to Area 7.

Update from the Joint Committee

Tom described the new form the TAP staff has developed to submit Legislative Issues to the National Taxpayer Advocate. This form will allow TAP members to submit Legislative Issues with comment for the NTA to consider for possible inclusion in the NTA report to congress. Tom expressed that this is not a change in policy and the committee will still be focusing on non-legislative issues. The development of this form is in response to some of the TAP members concern that the TAP view on legislative issues should be more formalized. Legislative issues would be forwarded from the TAP members to the area committee chair who would then submit the form to the joint committee who would periodically submit them to the National Taxpayer Advocate.

Tom recommended that Area 7 not spend time analyzing or discussing legislative issues. The committee could get side tracked by reviewing complexes issues that the committee does not have time for.

Recruitment Process Feedback

Tom explained that the TAP staff is interested in feedback from members regarding their experiences during the recruiting process. To improve the recruitment process, the TAP staff is seeking suggestions for improvements. The members are encouraged to think back and provide feedback on their experiences and send any comments by email to the TAP Analyst.



Action: The members will provide feedback on their recruitment experiences to Mary by the end of February.

News Releases

Mary discussed the next steps for the news releases that have been prepared for the committee members. The TAP staff will be working with the media specialist in each member's area to get the news releases out. At this point, the members will not need to do anything further for this process. For those panel members who have not yet submitted information, it is not too late to have the TAP staff prepare a news release.

Laurie related that there have been several occasions when the media were in attendance at outreach events and it has been helpful to have several copies of a news release or a bio to give. This helps when providing information about TAP and about the TAP members.

Tom asked Mary if it was possible to combine news releases into one. Tom, David and Doug live near one another and they would be sending news releases to the same newspapers. Tom asked if the news releases could be edited into one. Mary told Tom that it was a good idea.

Action: Tom and Mary will work together to produce a blended news release for the San Jose region.

Tom asked Mary if she would like the members to provide names of people at their local newspapers. Mary indicated that it would be fine if members provided the names but it would not be necessary. Laurie also explained that for smaller cities, it would be ideal for a panel member to contact the newspaper and provide the news releases but with larger cities, like the LA, it would be impossible. Laurie recommends that the media specialist send out the news releases then weeks later the individual member call and introduce themselves.

Tom asked how they would know who the media specialist sent the news releases to. Laurie explained that she and Mary will be able to provide that information to the members and put them in contact with the media specialist in their area.

It was suggested that when a member attends a speaking engagement or an outreach event, the staff could contact the person responsible for the organization and provide them with the news release of the panel member.

The issue of business cards was introduced. Many panel members feel the frustration of not having a business card to use during outreach events. The TAP staff is still exploring possibilities to get the cards printed as soon as possible.

Action: TAP Analyst will forward the committee's frustration concerning the lack of business cards to the TAP director.

Issue Process for Area 7

Margaret gave a synopsis of the progress of the issue process subcommittee. The subcommittee met on February 4th. The committee developed a process to prioritize issues as well as to start the prioritization work on new Area 7 issues.

The Issue Process Subcommittee developed the following process for issues to be worked in Area 7.

1. All issues entered into the Contact Database for Area 7 will be reviewed by the subcommittee. The subcommittee will initially perform three functions.
 - o a. Prioritize the issues (picking the top three to four to be actively discussed during teleconferences. Those not actively discussed will be placed in the parking lot.

- b. Discuss which issues are not TAP issues, issues that are legislative and those that should be dropped.
 - c. Prepare a recommendation list for the entire committee of the prioritized issues, legislative issues and those issues that should be dropped.
2. The committee will be given the recommendation list along with the issues. The committee members will agree or not agree to the recommendation. The mode of communication will be via email. The purpose of this process is to not use valuable time during a meeting to discuss issues that have little or not merit. The further purpose is that if a committee member disagrees with the subcommittee's recommendation, the issue will be placed back in the queue to be discussed at a future committee meeting.
 3. The analyst will concentrate initial research on the top issues decided on by the subcommittee.
 4. The top issues will be discussed at a committee meeting. The entire committee will decide on what happens to the issue. Should we develop the issue further?
 5. Those issues that will be developed will be assigned a champion to work with the analyst and those committee members who also want to participate in working the issue. The role of the champion will be to guide the development until there is either a recommendation to the joint committee or the issue is dropped and to report on the progress at committee meetings. The first step in assigning a champion will be by a committee member volunteering. If there are no volunteer's to champion an issue, the issue will be placed back in the parking lot.

The committee discussed that the process for legislative issues needed to be added to the issue process document.

Tom felt that the process was excellent and he would like to see it sent out in an email so the members could refer back to it if needed.

Action: Margaret and TAP Analyst will incorporate the changes and send the issue process procedures out to the entire committee before the next meeting.

Existing Active Issues:

- **IRS Refund Website**

TAP Analyst O'Brien gave an update on the issue. There has been an addition to the starting page of the refund website. It doesn't address the problem of a lack of taxpayer information; however, it does provide a number to call the IRS.

The committee discussed the difficulty a taxpayer has in using the website. The website has good information about refunds as well as how to contact the IRS. Some of the problems working with the website might be terminology that is used to request identifying taxpayer information such as filing status. Are the links on the refund website adequate? Is the IRS asking for too much personal information that places a burden on the taxpayer before allowing refund information?

Some initial suggestions to change the refund site include: The taxpayer should be able to provide their name and social security number on the site. Once the taxpayer has done so; then the site should indicate that the taxpayer is receiving a refund; instruct the taxpayer to locate their tax return to answer additional questions.

Decision: The TAP analyst will research the potential for establishing a prescreening stage for the "Where's my refund" website. Larry will champion this issue.



- **Outreach Coordination**

The committee discussed this as being an internal Area 7 issue instead of an issue that they would recommend to the joint committee. Best practices would not be lost since the new Communication Issue committee has Area 7 representation.

Decision/Action: The committee agreed to take this out of "Active Issues" and continue to provide outreach reports during the Area 7 meetings.

New Issues

- **TAS Authority to Release IRS Levies - #3280**

TAP analyst O'Brien gave a brief synopsis of the history of releasing levies in the Taxpayer Advocate Service (TAS).

Bruce discussed the origin of this issue and would like to champion this. The committee discussed the problems associated with TAS being unable to release levies except in specific instances such as a few Systemic levies. Bruce mentioned that there's the issue of whether Automated Collection Levies could be put into the category of Systemic Levies where TAS is authorized to release the levies directly. Bruce explained that he would recommend that the IRS consider putting automated collection levies into systemic levies category under the manual and explain why current procedures would not be feasible for them.

The TAP analyst explained that it is not the intent of the TAS to do the work that the IRS should do. Part of the education for the IRS is to fix their own problems. Laurie discussed that she has not had many problems in releasing a levy. One specific instance is when a levy is going to happen the day the taxpayer calls. If the TAS has at least one day notice, they can get the levy release per the TAS criteria. The panel discussed if time zones may be an issue. Also, is there a problem when the TAS office is small as it is in Alaska? LA has 40 people who can work a levy release while Alaska has 4 case workers and a manager. Case Load could be a recommendation if the research shows this is a problem.

a manager. Laurie felt that the committee could make a case to spread work out.

Action: Bruce will champion this issue and provide more information to the committee for a possible recommendation. Bruce will follow up with the Local Taxpayer Advocate (LTA) in Alaska. Mary will continue to research. Laurie will poll other LTA's in area 7 to see if they have had problems releasing levies.

- **Mail Procedures at Taxpayer Walk-in Offices**

Taxpayer Assistance Centers are not allowed to accept packages due to the changes in procedures implemented after 911. Letters and packages that come through the mail are required to be screened for possible toxins; therefore, the TAC can not be responsible for accepting packages.

Mary indicated that she is still locating the IRS Directive that requires personnel not to receive packages over the counter. Mary also indicated some offices have different processes.

Decision: Mary will continue her research on this issue. Sherry has agreed to be the champion for this issue.

- **Downloading Forms on IRS Website**

Decision: The committee felt that this was a computer literacy problem and it is not the mission of the IRS to provide computer lessons. The committee decided to drop this issue.



Outreach

Tom provided a report out on a meeting his regional group had. Tom explained that his group is coordinating a joint press release for his regional group in the attempt not to send duplicate materials to local newspapers. In addition, the group decided to arrange a meeting with the LTA in San Jose, CA to discuss coordination activities. The group has also decided that David will contact the Congressional office in their area.

David spoke with the Congressional Constituent Service Representative that handles taxpayer issues/IRS issue. He explained that they had nothing but positive things to say about interactions they have had with TAP. They were not aware that they had TAP members in their region. Tom suggested that the press releases should be sent to those offices.

Action: TAP analyst will discuss sending news releases to the Congressional Offices in the areas that there are TAP representatives.

Action: All members will submit to Tom as well as the TAP analyst all outreach activities they've attended each month. This information will be rolled up into the Area 7 monthly report. The TAP analyst will consolidate outreaches into one report.

End of Meeting Assessment

The each committee member provided their assessment of the meeting. Everyone felt that it went well. A suggestion was made that in order to save time; the research report should be read a head of time, so time isn't wasted reviewing the issues but used to decide what recommendations will be made. In addition, another suggestion was made that time could be taken from the Welcome/Announcements/Review Agenda and spent on working the issues.

Laurie suggested that the length of the meeting could be extended to 90 minutes. This will help the members plan for a 90 minute call and not feel so stressed if they plan for a 60 minute call and the call goes over 60 minutes. Laurie indicated that it was ok if a teleconference ends early.

Closing

Tom closed the meeting. The next call will be March 24, 2005 @ 12:30 pm Pacific.

Assignments

Action: The members will provide feedback on their recruitment experiences to Mary by the end of February.

Action: Tom and Mary will work together to produce a blended news release for the San Jose region.

Action: TAP Analyst will forward the committee's frustration concerning the lack of business cards to the TAP director.

Action: Margaret and TAP Analyst will incorporate the changes and send the issue process procedures out to the entire committee before the next meeting.

Action: Bruce will champion the ACS Levy issue and provide more information to the committee for a possible recommendation. Bruce will follow up with the Local Taxpayer Advocate (LTA) in Alaska. Mary will continue to research. Laurie will poll other LTA's in area 7 to see if they have had problems releasing levies.

Action: TAP analyst will discuss sending news releases to the Congressional Offices in the areas that there are TAP representatives.



Action: All members will submit to Tom as well as the TAP analyst all outreach activities they've attended each month. This information will be rolled up into the Area 7 monthly report. The TAP analyst will consolidate outreaches into one report.



**Area 7 Committee Meeting Minutes
Area 7 Committee
January 19, 2005**

Attendees:

- Margaret Balcom
- Larry Combs
- Robert Forst
- James Griffin
- Cheyanna Jaffke
- Thomas Karwin, Chair
- Laurie Keleman, Designated Federal Official
- Allena Lu, Vice Chair
- Howard Perkins
- David Robinson
- Iris Sosa
- David Terrazas
- Douglas Wilhelm

Staff

- Judi Nicholas, Program Manager
- Mary Peterson O'Brien, TAP Analyst
- Marla Ofilas, Note Taker

Welcome/Announcements/Roll Call

Tom opened the meeting and welcomed the Area 7 members. Tom announced that Allena will serve as facilitator during the Area 7 meetings.

Allena reviewed the agenda. A roll call confirmed that a quorum was met.

Existing Issues:

- **TAP Speaker Outreach Kit**
Laurie Keleman gave a history of actions Area 7 has taken on this issue for the benefit of the new panel members. The outreach kit check sheet was created and provided as a handout for the panel members. Since there are different comfort levels for each panel member regarding research, the kit provides a convenient way to organize a panel member for the many different types of outreach. The vision of the committee who worked on this was to have a folder with items from the check sheet included so that it was readily available when a panel member attended an outreach.

The committee discussed the idea of elevating this issue to the joint committee for other areas to use as a template. At this time, each area is autonomous in how outreaches are prepared for and carried out. It was decided that each member would use the Outreach kit during the next few months and then revisit the issue. At that time, the committee will discuss if this is a useful tool as well if the kit needs to be modified.



Decision: The committee decided to gain experience with the outreach kit before making a recommendation to the Joint Committee. The committee will discuss their experiences during their next face-to-face meeting.

Face-to-Face Meeting Options

Due to budget constraints all committees within TAP will only be allowed to schedule one face-to-face meeting. During the annual meeting in D.C. the committees were asked to schedule 2 face-to-face meeting with the hope that funding will be available.

The committee discussed possible dates and locations. Mary suggested that the committee consider having their face-to-face meeting in conjunction with an outreach activity and that there was an IRS Tax Forum scheduled in San Francisco at the end of June.

Decision: The committee agreed to have their first face-to-face meeting in conjunction with the San Francisco Tax Forum on June 30th and July 1st. Travel days are set for June 29th.

Outreach

Judi gave a presentation about Outreach and what the role of the staff in support of the Outreach effort. Teleconferences are being arranged between the Local Taxpayer Advocates and the committee members in their area. The goal is to introduce the members to someone that is actively involved in Taxpayer Advocacy Service outreach activities and how that person could be a resource for the members.

The purpose of outreach is to represent the TAP and listen to taxpayers suggestions for IRS change. If committee members are asked about a personal taxpayer issue or IRS policies, they should refer the taxpayer to the IRS to answer their personal questions.

Prior to attending an outreach event that would incur a cost or would expect to be reimbursed for parking or tolls, each member will need to get pre-approval two weeks in advance. The purpose of pre-approval is for budget tracking as well as to keep track of committee outreach activities.

The power point presentation sent in the pre-read material is a tool to provide talking points to assist members with presentations. The TAP office is limited on outreach marketing supplies. Therefore, Mary will only be able to send what is in stock.

The question was asked if a press release has been issued regarding the selection of new panel members. There has not been a press release approved at this time.

Action: Judi will follow up and get specifics on the delay of the press release.

It was asked what the status of panel members' business cards is. Judi explained that we are awaiting the approval of the budget and the printing request.

Issue Process for Area 7

Tom gave a brief description of how a TAP issue flows. This material can be referenced in the TAP Member handbook. Tom asked for volunteers to form a subcommittee that would develop a process to work Area 7 issues as well as to prioritize the issues for committee meetings. The subcommittee would include Mary O'Brien, TAP analyst and Laurie Keleman, Area 7 DFO.

Decision: Robert Forst and Margaret Balcom agreed to participate in the subcommittee.



Action Item: Mary will email a reminder that the subcommittee will meet the first week of February to review incoming issues. Mary committed to mail out new issues to the subcommittee by January 28th. Subcommittee members agreed to review the issues and be prepared to discuss issues and process on the February call.

New Issues

The committee agreed on a process to discuss and decide on the disposition of issues. Mary will provide a brief description of the issue and allow the committee to discuss the issue and ask questions. Once the review is completed, the committee will then decide actions for each issue.

- **IRS Refund Website**

The IRS Refund Website issue is that it was not as easy to use and navigate as other non IRS websites concerning possible IRS refunds. The National Taxpayers Union website was specified to use as a best practice.

The committee discussed the pros and cons with each website. One difference is that the IRS website requires you to input the exact refund amount that you're expecting. The National Taxpayers Union website confirms that you'll be receiving a refund but refers you back to the IRS website.

The question was asked about how outside websites gets information on potential taxpayer refunds. The IRS provides a list of unclaimed refunds. The list contains the name of the taxpayer, city, zip code and dollar amount. The list does not contain personal information.

Decision: The committee decided to discuss this issue at the next committee meeting.

Action Item: Each committee member will access each website and be prepared to discuss options to improve the IRS refund website at the next committee meeting.

- **Outreach Coordination**

The issue is how to coordinate TAP members Outreach so as to not duplicate efforts and reach a wider variety of people and groups.

Action/Decision: The committee agreed to organize 5 or 3 regional subcommittee to discuss among themselves, individual and subgroup outreach plan and report back to the committee during the next Area 7 meeting.

- **EITC Pre-Certification**

The issue is that the IRS should consider a measured rollout of the EITC pre-certification program to ensure those taxpayers not affected are not unnecessarily burdened. The EITC has done a pilot of the EITC Pre-Certification program in one small town.

Action/Decision: The committee decided to refer this issue to the EITC issue committee.

Committee Business

Due to a conflict of time with the Joint Committee meetings, the Area 7 committee discussed alternative dates and times to meet.

Decision/Action: The committee decided to meeting on the 4th Thursday of each month. Area 7 next meeting will be on February 24th @ 12:30 pm.



End of Meeting Assessment

Each member provided an assessment of the meeting. Majority of the members felt that the meeting went well, was informative and liked the idea of having a facilitator. Some members felt that more time should be allotted for discussing issues so members are not cut off in the middle of a good discussion.

In addition, a suggestion was made to have a brief description along with options, prior to the meeting, of what decisions will need to be made during the meeting. This would help speed the agenda along. For example, having the face-to-face meeting options in advance so the committee would only need to approve and not discuss.

Closing

Laurie closed the meeting. The next Area 7 teleconference will be Thursday February 24th @ 12:30 pm to 1:30 pm.

Assignments:

TAP Analyst:

- **Action Item:** Mary will email a reminder that the subcommittee will meet the first week of February to review incoming issues. Mary committed to mail out new issues to the subcommittee by January 28th.
- **Action Item:** Mary will refer the EITC pre-certification Issue to the EITC Issue Committee.

TAP Manager

- **Action:** Judi will follow up and get specifics on the delay of the TAP press release.

Area 7 Committee Members

- **Action Item:** Issue Process Subcommittee members agreed to review the issues and be prepared to discuss issues and process on the February call.
- **Action Item:** Each committee member will access each website and be prepared to discuss options to improve the IRS refund website at the next committee meeting.
- **Action/Decision:** The committee agreed to organize 5 or 3 regional subcommittee to discuss among themselves, individual and subgroup outreach plan and report back to the committee during the next Area 7 meeting.