



2010 Meeting Minutes Earned Income Tax Credit (EITC) Project Committee Meetings

- September 22, 2010
 - August 25, 2010
 - July 28, 2010
 - June 23, 2010
 - May 26, 2010
 - April 20-21, 2010
 - March 24, 2010
 - February 24, 2010
-

**Taxpayer Advocacy Panel (TAP)
EITC Project Committee
September 22, 2010 1:00 pm EST**

Designated Federal Official (DFO)

Ferree, Nancy TAP Program Manager, Plantation, FL

Members Present

Akbar, Sandra
Cabusora, Haidee
Tatum, Sue
Webber, Erica

Members Absent

Alvarado, Frank
Birge, Eileen
Granger, Jacqueline
Hayes, Herbert
Patterson, Robert
Stepner, Gerald
Villarreal, Josephina

Program Owners

None present

Staff Present

Nancy Ferree, TAP Manager
Anita Fields, Management Assistant
Donna Powers, TAP Analyst

Welcome & Roll Call/Quorum

Erica Webber opened the meeting and thanked everyone for attending. She announced that Josefina Villarreal was on travel status, and she was sitting in for her. Anita conducted roll call and quorum was not met.

Introduction of Guest

None

Review Meeting Minutes

Minutes from August are approved by consensus.



Subcommittee Report-Out:

Education— Sandra Akbar reported that the subcommittee has been working on the three sets of education training. The subcommittee submitted to the program owners a couple a weeks ago to review or add comments. The feedback from the EITC program office was that it is an excellent start and it is going to be an ongoing process. The committee has to do a little more tweaking because it is a big audience. There are three different sets (primary, intermediate and a more advance) slides. Internal and external people training people on EITC will use the slides. The committee is waiting for additional comments and they will continue the process of perfecting this particular program. Eventually this training will be on the EITC website for people to use as a resource.

Input—IRS Program Owner

None Present

Input from Members of the Public

No members of the public were present.

Closing

Webber closed the meeting and thanked everyone who attended.

The next meeting is a teleconference October 27, 2010 at 1:00pm EST.

***Certification: The committee approved these minutes by consensus.**



**Taxpayer Advocacy Panel (TAP)
EITC Project Committee
August 25, 2010 1:00 pm EST**

Designated Federal Official (DFO)

Ferree, Nancy TAP Program Manager, Plantation, FL

Members Present

Akbar, Sandra
Alvarado, Frank
Birge, Eileen
Cabusora, Haidee
Granger, Jacqueline
Tatum, Sue
Villarreal, Josephina
Webber, Erica

Members Absent

Hayes, Herbert
Patterson, Robert
Stepner, Gerald

Program Owners

Foley, Barbara, EITC Program Analyst

Staff Present

Nancy Ferree, TAP Manager
Anita Fields, Management Assistant

Welcome & Roll Call/Quorum

Josefina Villarreal welcomed everyone to the meeting. She mentioned that the EITC presented the PowerPoint presentation to the Joint Committee (JC) and they approved it with a few minor recommended changes.

Anita conducted roll call and quorum was met.

Introduction of Guest

None

Review Meeting Minutes

Minutes from May and June are approved by consensus and July's minutes are approved by consensus, subject to the confirmation of Haidee Cabusora's presence or absence.

Subcommittee Report-Out:

Training—Villarreal reported that she did a final edit of the training report. She sent it to Marianne Ayala last week and it did not quite make it to JC, but it will be on the JC agenda for September.

Suggestions for Next Year Projects

Villarreal said she hopes that everyone has been thinking about possible new projects that the committee wants to work on for next year. She said that the committee has been given an opportunity to interject what the committee wanted to do all along ;usually the committee takes the lead from the Program Owner and now the committee can say what they feel needs to be improved on the EITC and the processing of it.

Villarreal suggests that there be an improvement of support in the records that are submitted to the tax preparer in order to reduce fraud. As a tax practitioner, she has seen a lot of fraud occur. She



stated that if there were certain support documents present at that interview it could have been avoided. She said that there is also no matching of SSN with their validity.

Haidee mentioned that in Tax Wise the tax administration office states that when you run the diagnostics it tells you the exact date and year the SSN were issued.

Sue Tatum proposed to look at how we can get EITC education at a local level. She thinks it would be great to develop a teaching plan or an education plan that is targeting those people who qualify, but do not apply for it now, at a grassroots level.

Jackie Granger suggests that she would like to look at the error rate to see what can be done to reduce the 14% error rate.

The committee discussed numerous ideas for improving the error rate and reducing fraud.

Sandra Akbar shared that part of the compliance issue, is that tax preparers also need to require documentations and SSN cards. Akbar feels that they are stepping into the compliance area and she, also said that when the IRS completes the process of certifying the paid preparers that will help reduce a lot of the fraud.

Nancy Ferree said that if they can frame their concerns around a customer service and satisfaction issue, then it would be acceptable. TAP's mission is to improve customer service and satisfaction within the IRS. We are not within our purview if we are talking about compliance issues.

The training subcommittee sent the recommended changes to the subcommittee for their review and comments. Villarreal will send the changes by the end of the week.

Input—IRS Program Owner

Barbara Foley discussed two ideas that came from her and one of her colleagues. The first is the distribution list with sites that would be used to mail out EITC products annually. Foley does not see that it is a project, but they can put it in as a suggestion. The EITC office does have standing orders for EITC information that are sent to many of the SPEC partners that they request each year. This saves on postage by using the direct mailing. The other idea with the presentation that was just approved, Foley sent some comments back to Marianne. While she was reviewing the presentation, she found it difficult because there was four different presentations. Therefore, her thought is to make it a library of slides and then instead of having four different shows for people to pick from, they can pick from slides depending on the audience. Another idea is based on return preparer review strategy, to design a communication campaign, not to preparers, but to EITC eligible taxpayers and give advice how to pick a good preparer. This can possibly be combined with the previous idea of asking what to bring when go to get the taxes prepared.

Foley shared that there are two big things that are happening in the Program, One is that the repeal of Advance EITC which will no longer be available after 12/31/2010. The President signed the elimination of advance EITC into law on August 10, 2010 as part of the Education Jobs and Medicaid Assistance Act of 2010.

The other item is that Pat Lee is on a detail and Lynne Morrison is the Acting Director of Program Evaluation Stakeholder Engagement (PESE).

Eileen Birge explained the debt indicator.

Input from Members of the Public

No members of the public were present.

Closing

Villarreal recapped what occurred during the meeting and thanked everyone for attending.



The next meeting is a teleconference September 22, 2010 at 1:00pm EST.

***Certification: The committee approved these minutes.**



**Taxpayer Advocacy Panel (TAP)
EITC Project Committee
July 28, 2010 1:00 pm EST**

Designated Federal Official (DFO)

Ferree, Nancy TAP Program Manager, Plantation, FL

Members Present

Birge, Eileen
Patterson, Robert
Tatum, Sue
Villareal, Josephina
Webber, Erica

Members Absent

Akbar, Sandra
Alvarado, Frank
Cabusora, Haidee
Granger, Jacqueline
Hayes, Herbert
Stepner, Gerald

Program Owners

Foley, Barbara, EITC Program Analyst

Staff Present

Ayala, Marianne, TAP Analyst
Nancy Ferree, TAP Manager

Welcome & Roll Call/Quorum

Josefina Villarreal welcomed everyone to the meeting and gave a report from the Joint Committee (JC).

Marianne did roll call and quorum was not met.

Introduction of Guest

None

Review Meeting Minutes

Quorum was not met, so meeting minutes cannot be approved.

Subcommittee Report-Out:

Education—Erica Webber reported that a week ago Jacqueline Granger and the entire subcommittee compiled the three presentations. They sent the presentations to the Program Owner and TAP analyst for suggestions and changes.

Ayala forwarded the presentations to Barbara Foley for recordation and to JC.

Training—Robert Patterson reported there is a draft on the training project, which Ayala updated on TAPSpace.

Tax Preparer's Toolkit Website - Villarreal reported on tax preparer's toolkit website. All areas were completed. Ayala compiled the data and forwarded to Foley. Eileen Birge had more information to provide, but needed additional time. Foley advised that she would need the additional information by August 10, 2010, since the EITC staff that is working on this webpage will be evaluating all feedback on August 11, 2010.



Program Owner Input

Foley shared that she has a few new announcements. AARA new assignment for next year, but she will still work with EITC TAP committee.

Granger asked if publications and products are updated automatically. Foley answered yes they are, also for Tax Forums they tried to get Pub 3524 new versions for distribution. Ayala can order for everyone. Pub 4808 (new pub) for persons or child with disability—this pub explains the law. Pub 4716—will be out later this year. Pub 4717(new pub)—is out now, volunteer sites will want to have these new pubs and Pub 4687—Spanish, now available.

Foley's new assignment is effective now and everyone wished her congratulations.

A re-cap from the meeting: Patterson's project is still in draft. Webber's project is complete, just waiting for responses.

Ayala asked Foley for any new assignments to review. Foley will let her know. Ayala said that she has ideas, but needs to run them by her manager first.

Input from Members of the Public

No members of the public were present.

Closing

Villarreal recommended that the committee do one project at a time. She also announced she would be unavailable from 8/1-8/8.

Nancy Ferree encouraged everyone to call the members who are absent to encourage him or her to be on the next call.

Villarreal thanked everyone for attending.

The next meeting is a teleconference August 25, 2010 at 1:00pm EST.

***Certification: The committee approved these minutes by consensus on 25 August, 2010.**



**Taxpayer Advocacy Panel (TAP)
EITC Project Committee
June 23, 2010 1:00 pm EST**

Designated Federal Official (DFO)

Ferree, Nancy TAP Program Manager, Plantation, FL

Members Present

Alvarado, Frank
Birge, Eileen
Tatum, Sue
Villareal, Josephina
Webber, Erica

Members Absent

Akbar, Sandra
Cabusora, Haidee
Granger, Jacqueline
Hayes, Herbert
Patterson, Robert
Stepner, Gerald

Program Owners

Foley, Barbara, EITC Program Analyst

Staff Present

Ayala, Marianne, TAP Analyst

Welcome & Roll Call/Quorum

Josefina Villarreal welcomed everyone to the meeting.
Marianne did roll call and quorum was not met.

Introduction of Guest

None

Review Meeting Minutes

Quorum was not met, so meeting minutes cannot be approved.

Subcommittee Report-Out:

Education—Jacqueline Granger was not on the call, Erica Webber reported out for her. The subcommittee has prepared the final information on the three PowerPoint Slide presentations:

Beginners—for individuals that have never claimed EITC before,
Intermediate—individuals who have previously claimed EITC, and
Advanced—for preparers that know about EITC.

Sandra Akbar will be adding graphics to the power point presentations and the subcommittee will meet to comment and the final draft will be completed for submission to the program office by July 9th.

Training—Robert Patterson was not available, Marianne Ayala reported out for him. Patterson had prepared a draft copy of the training module. During their conference call he noticed that important information from the first draft was deleted, he plans on incorporating it and sending out to the rest of the members so they may comment on it during their next subcommittee meeting. After editing all comments the final draft will be completed for submission to the program office before the next EITC Monthly meeting.



Program Owner Input

Barbara Foley shared that once the products from each subcommittee is received they will take time to review. If any project comes up for this committee she will let them know.

Input from Members of the Public

No members of the public were present.

Closing

Villarreal thanked everyone for attending.

The next meeting is a teleconference July 28, 2010 at 1:00pm EST.

***Certification: The committee approved these minutes by consensus.**



**Taxpayer Advocacy Panel (TAP)
EITC Project Committee
May 26, 2010 1:00 pm EST**

Designated Federal Official (DFO)

Ferree, Nancy TAP Program Manager, Plantation, FL

Members Present

Alvarado, Frank
Granger, Jacqueline
Hayes, Herbert
Stepner, Gerald
Tatum, Sue
Villarreal, Josefina
Webber, Erica

Members Absent

Akbar, Sandra
Armstrong, Charles
Birge, Eileen
Cabusora, Haidee
Patterson, Robert

Program Owners

Foley, Barbara, EITC Program Analyst

Staff Present

Fields, Anita, TAP Secretary
Ayala, Marianne, TAP Analyst

Welcome & Roll Call/Quorum

Jo Villarreal welcomed everyone to the meeting. Anita did roll call and quorum was met.

Introduction of Guest

None

Review Meeting Minutes

The committee approved April's face-to-face minutes by consensus.

IRS Response Report

Villarreal re-iterated that they need to get their completed reports in to the subcommittee leads by the end of the week. They are due Jun 1, 2010.

Joint Committee Report

Villarreal shared that Sabby is having an interim conference call with Nina Olsen. Shawn Collins was announced as TAP Director. There is a SWOT analysis team ongoing within TAP. It was discovered that there were issues that have been closed when they shouldn't have. There is a new process in place to help alleviate that problem. The Annual Report is in the final stages. July is the target date for release.

Subcommittee Report-Out:

Education—Jacqueline Granger shared that their deadline is 1 July. The subcommittee is currently working on a slide presentation for the IRS to use. They are preparing three PowerPoint Slide presentations 1. Beginners—for individuals that have never claimed EIC before, Intermediate—individuals who have previously claimed EIC, and Advanced—for preparers that know irs.gov.

Training—Gerald Stepner shared that during their conference call the subcommittee requested that



everyone send their report to him and he will write-up a final report. The education subcommittee is just completing their final write-ups.

Program Owner Input

Barbara Foley shared that the Adoption Credit has been expanded and they are in the process of preparing outreach and education on the credit. Foley will send some preliminary information to Marianne Ayala to share with the committee.

The plan for the EITC office is to have the publication and forms out before the beginning of the filing season.

Closing

Villarreal thanked everyone for attending.

The next meeting is a teleconference June 23, 2010 at 2:00pm EST.

***Certification: The committee approved these minutes by consensus.**



**Taxpayer Advocacy Panel (TAP)
EITC Project Committee Face-to-Face
April 20-21, 2010 8:00 am EST**

- Tuesday, April 20, 2010
- Wednesday, April 21, 2010

Designated Federal Official (DFO)

Ferree, Nancy TAP Program Manager, Plantation, FL

Members Present

Akbar, Sandra
Alvarado, Frank
Birge, Eileen
Cabusora, Haidee
Granger, Jacqueline
Patterson, Robert
Stepner, Gerald
Tatum, Sue
Villarreal, Josefina
Webber, Erica

Members Absent

Armstrong, Charles
Hayes, Herbert

Program Owners

Verlinda Paul, EITC Director
Patricia Lee, PESE Director (EITC Office)
Foley, Barbara, EITC Program Analyst
Anne Smiley, EITC Program Analyst

Staff Present

Shawn Collins, TAP Director
Fields, Anita, TAP Secretary
Ayala, Marianne, TAP Analyst

Tuesday, April 20, 2010

Welcome & Roll Call/Quorum

Jo Villarreal welcomed everyone to the meeting. She introduced Marianne Ayala and the EITC staff present.

Nancy Ferree welcomed everyone to the meeting and stated that if there is anything anyone needs while here to please let us know.

Shawn Collins welcomed everyone. Collins shared that recruitment is going well and it ends April 30, 2010. Currently there are 295 final applications and 1000 draft applications. Collins also shared that on the 27 of April, TAP Chair Sabby Jonathan along with a few more TAP members will have an interim conference call with NTA Nina Olsen. Jonathan will give an overview of the discussion during the JC call.

Anita did roll call and quorum was met.

Introduction of Guest

None



Review Meeting Minutes

The committee approved February and March minutes by consensus.

EITC Overview

Verlinda Paul gave a brief overview of the EITC Program and she discussed EITC Awareness Day 2010. EITC Awareness Day (EAD) was a bustle of activity, President Barack Obama, along with the IRS and hundreds of partners, issued 143 news releases. IRS executives, managers and relationship managers joined partners, congressional members and local politicians nationwide at 72 media events. IRS representatives participated in interviews with the Washington Post and USA Today, 24 satellite media interviews with television stations, 22 satellite interviews with Spanish television stations, a conference call with 24 print reporters and 10 interviews with radio networks reaching more than 1,000 radio stations. Field Media Relations Tweeted throughout the day and there were 24 letters to the editors, 13 social media events and 99 other types of events.

Verlinda also thanked the TAP members that participated in EAD. The TAP members that participated was:

Frank Alvarado—attended the EITC function in Bridgeport, CT. It was attended by the VITA sponsors, United Way, and the Mayor. It was a smaller attendance than previous years. However, it was an enthusiastic kickoff.

Jackie Granger—did not find an event in her area. She lives North of Milwaukee. Nevertheless, Jackie Granger reached out to non-profit groups who help low-income people in her county and found they had little information on EITC. Jackie is bringing them materials about EITC and is trying to get to rural areas during her term.

Bob Patterson shared that he sent letters and news releases to local newspapers and television stations. Unfortunately, it was overshadowed by the impending snowstorm in the Northern hemisphere so it didn't get front-page coverage.

Gerald Stepner— attended EITC day in Boston sponsored by the Boston coalition that sponsors about 30 volunteer sites. He said it was about 50-60 people there. He was able to talk about TAP to a couple of people there and it was a positive day for EITC and TAP.

Other TAP members and staff also attended EITC events, Charles Armstrong in Baton Rouge, LA, Tommy Thompson in Southaven MS, Naomi Woodward in Oklahoma and Nancy Elk in Montana. There was some changes in the EITC Income Limits and Credit Amounts for 2010. The temporary decrease of the marriage penalty for couples filing a joint return who claim EITC continued in 2010 and the expansion of the credit for three or more children continued. This is a temporary increase for 2009 and 2010 tax years only. However, there are some congressional proposals to make permanent. Due to the lower rise in the inflation rate, there is only a slight increase for credit and the income limits from 2009 to 2010. For a single, head of household or qualifying widow or widower, in 2009 both the amount of earned income and AGI had to be less than \$13,400, for 2010, the amount rose to \$13,460. The maximum amount of credit remained the same. For a couple filing a joint return with 3 or more children the amount rose to \$48,362 from \$48, 279 in 2009; the maximum amount of credit is \$5,666 from the \$5,657 maximum credit in 2009.

Verlinda gave a quick update on the 2009 recommendations from the TAP EITC Committee. The partner website committee reviewed the partner site and provided input to improve. One recommendation was to keep the website updated so people know the information is current, rely on the site and keep coming back. We have been making a concerted effort to keep the website up-to-date especially the What's Hot page, which last was updated 4/16/2010. She encouraged everyone to visit the site at www.eitc.irs.gov and provide feedback on what's working, what should be there and what's not easily accessible.



The Partner Relations made additional recommendations. From the work both committees did, we found out that we had many of the products Partners needed but they didn't know what was available. Based on the findings, last year we held an internal EITC Summit to find out ways to spread the message to Partners. As a result, we expanded participants on our weekly Awareness Day calls to include those working directly with the partners. Our office also joined some regional partnership calls and talked directly to the partners about the products available.

Verlinda added that TAP is very important to the EITC office because the members are on the ground and know what is going on out there with taxpayers.

Joint Committee Report

Villarreal shared that Sabby is having an interim conference call with Nina Olsen. Shawn Collins was announced as TAP Director. There is a SWOT analysis team ongoing within TAP. It was discovered that there were issues that have been closed when they shouldn't have. There is a new process in place to help alleviate that problem. The Annual Report is in the final stages. July is the target date for release.

2010 EITC Update

Patricia Lee thanked the members for being a part of the EITC committee. She mentioned that she is so proud of all the work done last year. Lee discussed the Return Preparer Strategy. The strategy began in 1998 and we call it due diligence requirements.

EITC have a due diligence program because of the EITC error rate, 66% of EITC returns are prepared by preparers, Congress enacted in response to EITC error rate by establishing IRS code 6695(g) and it will require preparers to take extra steps to ensure correct EITC claims.

Due diligence requirements consists of completion of Eligibility Checklist, computation of the credit, records retention and knowledge requirements.

Consequences of EITC Error for taxpayers are: math error notices, payback the credit, penalties and interest, form 8862, a two year ban of claiming the credit, and a 10 year ban of claiming the credit if it was determined to be fraud.

Lee stated there are consequences of EITC due diligence non-compliance. There are due diligence penalties, E-file sanctions, injunction actions barring preparers from return preparation and criminal prosecutions.

Lee informed the committee that the EITC office initiatives align with the new service wide goals. Those goals include increasing taxpayer compliance by leveraging the tax return preparer community, ensuring uniform and high ethical standards for tax preparers conduct through (service and outreach, education and training, and enforcement).

When the IRS EITC office do a Due diligence visit and if errors are found, the consequences for preparers are \$100 per return. Beginning next year preparers that file 100 or more are required to file electronically. The objective is to reduce the number of EITC claims made in error by visiting tax preparers who file a disproportionate number of "high risk" EITC returns. The IRS agents perform on-site audits to review preparer records, verify due diligence compliance, including whether preparer is meeting the knowledge standard, and to assess penalties when noncompliance is identified.

There are also streamline injunctions. These are reserved for preparers with a demonstrated history of non-compliance, IRS, the Department of Justice (DOJ) can move quickly and shut down preparers, and preparers could face criminal prosecution and/or additional penalties.

Questions and Comments

There were no questions or comments.



Wednesday, April 21, 2010

Welcome & Roll Call/Quorum

Erica Webber opened the meeting and welcomed everyone back this morning.

Anita did roll call and quorum met.

Webber made some agenda changes and suggested that the meeting ends at 11:00am.

Subcommittee Report-Out:

Education—Jacqueline Granger shared that they were tasked to create slides to help facilitate educating people about EITC. She stated that they will put the final changes to the slide presentation in May and a goal completion is August 2010.

Training—Bob Patterson shared that the training subcommittee is tasked with coming up with an EITC training module. He stated that they are following the VITA training guide. The subcommittee goal dated for completion is June 2010.

Round Robin

Ferree and Collins stated that they think that the EITC committee members are doing an outstanding job and keep up the good work. They said that we would not have a program without the members.

Patricia Lee echoed the statements of gratitude.

Foley shared, the two projects the committee is working on this year are suggestions from prior years. She asked as you complete the projects this year, to keep an eye out and send any suggestions to Marianne and the EITC office will consider them.

Tatum shared that she appreciated the presentations given by the program owners and it was well delivered. She asked is there anything the committee could do to help reduce the EITC error rate.

It was asked if the EITC office ever thought about verifying before the refund is released. Lee shared that they did do a three-year study and it did not get the results the EITC office anticipated. You can find the research study at www.irs.gov/EITC

The group-brainstormed ideas on how to reach individuals that qualify for EITC without having a qualifying child.

Closing

Villarreal thanked everyone for attending and she look forward to continue to work with the group. She also shared that this is her last year on the committee and she has enjoyed working with everyone.

The next meeting is a teleconference May 26, 2010 at 2:00pm EST.

***Certification: The committee approved these minutes by consensus on May 26, 2010.**



**Taxpayer Advocacy Panel (TAP)
EITC Issue Committee
Thursday, March 24, 2010 1:00 pm EST**

Designated Federal Official (DFO)

Ferree, Nancy TAP Program Manager, Plantation, FL

Members Present

Akbar, Sandra
Birge, Eileen
Granger, Jacqueline
Tatum, Sue
Villarreal, Josefina
Webber, Erica

Members Absent

Alvarado, Frank
Armstrong, Charles
Cabusora, Haidee
Hayes, Herbert
Patterson, Robert
Stepner, Gerald

Program Owners

Foley, Barbara

Staff Present

Fields, Anita, TAP Secretary
Powers, Donna, TAP Analyst
Ayala, Marianne, TAP Analyst

Welcome & Roll Call/Quorum

Jo Villarreal welcomed everyone to the meeting. Anita did roll call and quorum not met.

Introduction of Guest

None

Review Meeting Minutes

The minutes were not approved, due to quorum not being met.

Subcommittee Report-Out:

Education—Jacqueline Granger had nothing to report, they are waiting on the face-to-face meeting. Over the last month all subcommittee members have designed a PowerPoint presentation of their individual topic. For the face-to-face meeting they will discuss the direction the subcommittee wants to go.

Training—Marianne Ayala reported that during the subcommittee call the committee discussed the information the subcommittee wanted to review. They want to review the training module for VITA training and they want to know how the IRS comes up with these training modules. Ayala is currently trying to speak with someone in VITA to answer the questions on how the IRS comes up with the training modules.

Input from Program Owners

Barbara Foley said that there is not a lot of things happening right now. The office is just going along with the filing season and making sure that everything is up-to-date. Eileen Birge asked is there an interchange with the term Earned Income Tax Credit (EITC) and Earned Income Credit (EIC). Foley



explained that both terms mean the same. The difference is the schedule is Earned Income Credit. Foley would like during presentations to use the term Earned Income Tax Credit. Foley explained that EIC is how the scheduled is named, but the credit is EITC.

Granger stated, that Commissioner Schulman said that he was going to do something about refund anticipation loans. Have anything been done on that? Granger said this is a big issue for their target population. Foley said that she would do some research and give an update during the face-to-face meeting next month.

The members also asked Foley about certification for tax preparers. Foley informed that by next year all tax preparers would need to have their own number and register. There will be requirements for them to have continuing education credits and they will also have to pass some type of testing to show that they are knowledgeable enough to prepare a tax return.

Granger asked is there a strong reason why the EITC office does PowerPoint slides; they do not use white backgrounds. Foley stated that they can do a lighter background.

Face-to-Face Meeting Dates

Ayala reminded everyone that the travel date for the meeting is 19 April and the meeting will begin at 8am 20 April. She also informed the committee that she has requested lunch menus from the hotel to help facilitate the lunch rush. The hotel is also offering everyone in the group a 20% discount. Anita asked that all panel members bring their copy of the NODT letters with them to the face-to-face meeting.

Closing

Villarreal asked that everyone make note of different issues that they are not clear and bring it to the meeting.

The next meeting is a face-to-face meeting 19-21 April, 2010 in Miami, FL.

***Certification: The committee approved these minutes by consensus on 4/20/2010.**



**Taxpayer Advocacy Panel (TAP)
EITC Issue Committee
Thursday, February 24, 2010 1:00 pm EST**

Designated Federal Official (DFO)

Ferree, Nancy TAP Program Manager, Plantation, FL

Members Present

Akbar, Sandra
Alvarado, Frank
Granger, Jacqueline
Hayes, Herbert
Patterson, Robert
Stepner, Gerald
Tatum, Sue
Villarreal, Josefina
Webber, Erica

Members Absent

Armstrong, Charles
Birge, Eileen
Cabusora, Haidee

Program Owners

Foley, Barbara

Staff Present

Fields, Anita, TAP Secretary
Powers, Donna, TAP Analyst
Ayala, Marianne, TAP Analyst

Welcome & Roll Call/Quorum

Jo Villarreal welcomed everyone to the meeting. Anita did roll call and met quorum.

Introduction of Guest

None

Review Meeting Minutes

The committee reviewed and approved the January meeting minutes by quorum.

IRS Response Report

The IRS responded to the 2009 projects assigned to the EITC group. They responded to both the partner website and the partner installations. They agreed and disagreed on what the EITC issue committee presented. Villarreal encouraged all members to review the response and it is on TAP Space for all to review.

Villarreal asked if the committee is supposed to go back and make further changes or is it a conclusion. Barbara Foley stated this is an update, she said that the EITC office don't stop looking at the suggestions just because the year is up. She said that she would have another update by the time we go to the face-to-face meeting. Foley also stated that the EITC office really don't give a formal response other than to keep the panel update and that they are considering your recommendations and that the EITC office is not letting go of it either. If the panel have any questions about the response or don't like the response, just give her a call and maybe she can clarify.



Bob Patterson suggested that the committee share this response with the Joint Committee; it shows how our program owners are tracking what we do. He feels that it is informative and has a wealth of information; it shows that the committee is getting feedback from them.

Subcommittee Report-Out:

Education—Jacqueline Granger said that their subcommittee is in charge of creating a PowerPoint presentation regarding EITC. They have a better understanding after they had their subcommittee call of who the target audience is. The subcommittee is in the process of creating a PowerPoint presentation pertaining to EIC. Each subcommittee member was assigned a topic and will be creating a slide pertaining to that topic.

Training—Bob Patterson reported, the subcommittee met and made sure that they had everything defined and know what they are going after. Donna Powers is gathering education materials for the subcommittee to ensure they hit the right subjects. The other thing the subcommittee is working on is a term to replace due diligence for the volunteers.

Donna will begin to post notes from the subcommittee calls on TAP Space.

Input from Program Owners

Barbara Foley asked each person that participated in EITC Awareness Day to share his/her experience.

Frank Alvarado—shared that he attended the EITC function in Bridgeport, CT. It was attended by the VITA sponsors and the Mayor. He also said that it was an enthusiastic kickoff.

Gerald Stepner—shared he attended the EITC day in Boston. He said it was approx. 50-60 people there. He was able to talk about TAP to a couple of people there and he said it was a positive day for EITC and TAP.

Granger—she said that she lives N. of Milwaukee in a different county. The county she lives in does not have any major cities in it. Therefore, she watched the Milwaukee Journal, which is the newspaper. She stated they put a little blurb in the paper about EIC about a week after EITC day. Granger also shared that she has been going around speaking to all non-profit groups who help low-income people in her county and they did not know much about EIC.

Patterson shared that he sent quite a few things out to local newspapers and television stations. He said that unfortunately a lot of it was overshadowed by the impending snowstorm in the Northern hemisphere. Therefore, it was not much on the front, at least about any of it. Patterson said that he know they had a kick-off on some of the low income tax return programs. He also asked Foley where he could get some information to place in a small doctor's office that service low-income people.

Face-to-Face Meeting Dates

During last month's call, there was a conflict on the face-to-face meeting dates. The committee has decided to hold the face-to-face meeting April 19-21, 2010. Anita Fields informed the committee that the cost comparisons came in and Plantation, FL is the location for the meeting. Fields will be sending out travel request information by the end of this week.

Closing

Villarreal restated the value of EITC day. Confirmed that the two groups will be called subcommittees. She thanked everyone for attending.

he next meeting is a teleconference on March 24, 2010, 1:00pm EST.

***Certification: The committee approved these minutes by consensus on 4/20/2010.**