

2011 Meeting Minutes Joint Committee

- November 23, 2011
 - October 27, 2011
 - September 22, 2011
 - August 25, 2011
 - July 25 – 27, 2011
 - June 23, 2011
 - May 26, 2011
 - April 28, 2011
 - March 24, 2011
 - February 24, 2011
 - January 25, 2011
-

Taxpayer Advocacy Panel Joint Committee Meeting Minutes November 23, 2011

Designated Federal Official

- Marian Adams Acting TAP Director

Members Present

- Thomas (Tom) Walker TAP Chair
- John Kim TAP Vice Chair
- Gerald (Jerry) Stepner Chair, Area 1
- Susan Lynn Chair, Area 3
- Mary Jo Werner Chair, Area 4
- Ken Donnelly Chair, Area 5
- Patricia O'Neill Chair, Area 7
- Ernest Miller Chair, Notices
- Harlan Barnett Chair, SBSE-Toll Free
- Mary Jean Potenzzone Chair, SBSE-Practitioners Experience
- Donald Thomas Chair, Forms and Pubs
- Erica Webber Chair, EITC
- Jackie Rollins Area 5 TAP Member
- Eboni Moss Area 3 TAP Member
- Barbara Baldwin Area 7 TAP Member
- Howard Levine Area 7 TAP Member



Members Absent

- Herb Bohrer Chair, TAC
- David Cain Chair, Area 2
- Susan DaCorte Chair, Communications
- Ann Rasmussen Chair, Area 6
- Stephen Vanderver Chair, VITA

Staff Present

- Steve Berkey Senior Program Analyst
- Susan Gilbert Senior Program Analyst
- Linda Rivera Senior Program Analyst
- Russ Pool Database Analyst
- Otis Simpson Budget Analyst
- Louis Morizio Program Manager
- Nancy Ferree Program Manager
- Roy Block Program Manager
- Audrey Y. Jenkins Program Analyst
- Patti Robb Program Analyst
- Lisa Gabriel Program Analyst
- Ellen Smiley Program Analyst
- Tim Shepard Program Analyst
- Janice Spinks Program Analyst
- Nina Pang Program Analyst
- Rose A. Babb Management Assistant

Guests

- Nina Olson National Taxpayer Advocate

Members of the Public

None

Welcome/Announcements/Review Agenda

Tom welcomed everyone to the meeting. Quorum was met for this meeting.

Approval of October 27 Meeting Minutes

The minutes were approved by consensus.

National Office Report

NTA, Nina Olson joined the Joint Committee Meeting to discuss some new developments about the TAP program: She discussed the following:

As of January 1, the TAP staff will become part of the Systemic Advocacy Organization, (SA). The TAP organization, which currently reports to Nina, will now report to Rena Girinakis, Executive Director Systemic Advocacy. Nina mentioned that this will result in better support for TAP staff and panel members by creating more opportunities for SA to



be involved in addressing issues entered into SAMS by TAP members. In addition, Nina stated that TAP staff will now have more ways to support the TAP Committees.

Nina stated that since the project committees have not met with their program owners, they do not know the issues they will be working on. SA and TAP will work together to build an environmental scan to look for issues surrounding the assigned projects. This will strengthen the focus of addressing the taxpayer perspective on how the IRS is providing service to both individuals and businesses.

The House of Representatives suggested cutting the federal budget by 5% and the Senate by 3.7%. In this budgetary climate TAP will now have one manager on the East Coast and one on the West Coast. The Milwaukee office will report to the new manager in Seattle. Beginning February 1st after Manager Nancy Ferree retires; the Plantation, FL office staff will be combined with the Brooklyn, NY office and will report to Manager Louis Morizio. This change will not require any relocation by TAP staff.

The second half of Nina's discussion:

Nina informed the Joint Committee members and TAP Staff that her office prepared a memorandum and sent it to Commissioner Shulman's office seeking approval for TAP's Annual Meeting. The Chief of Staff of the IRS Commissioner contacted her and stated that the Commissioner could not approve the TAP Meeting. The Commissioner felt that the cost of the meeting was significant and that there is no budget- as a result, the TAP Annual Meeting has been cancelled for December 2011.

Nina mentioned that the Federal Government is under major budgetary constraints and that there will be significant budget cuts for fiscal year 2013. She also stated that the Treasury Department has issued a memorandum that **all** travel for meetings including refreshments must be cleared by the Deputy Assistant Secretary of the Treasury.

A memorandum subsequent to this teleconference will be sent to all TAP staff and panel members informing them that the meeting has been cancelled. Members will be informed that the TAP staff will cancel all airline and hotel reservations on their behalf. Nina suggested that members continue to keep their schedules open for December 6 through 8. Plenary sessions will be conducted using an alternative method. Some subjects may be covered in a more condensed manner. She also mentioned that she is scheduled to meet with Commissioner Shulman the same week the TAP Annual Meeting is scheduled. Her meeting with Shulman will include the TAP chair and vice chair for this year and next year and staff that will teach the plenary session presentations.

Nina sent forward a memo to the Deputy Treasury Secretary seeking permission for the Chair Tom, Vice Chair John of TAP, Eboni, Jackie, Doc, Patty and TAP Director to travel to DC. The new goal now is to try to have the face to face meetings scheduled for January or February, 2012. For those members that have questions, Nina requested that



they consult with Marian Adams and Steve Berkey. Some questions can be fielded to her via Marian and Steve.

TAP Chair Report

Tom asked Otis Simpson to provide an update on the status of the project committees. Otis stated that the project committee reports are complete; members have made their selections. Tom mentioned that mentors should be assigned to members to assist them in their transition.

Project Committee Review Communication

Analyst Patti Robb reported that the following has been completed:

Annual Meeting Survey, Input for the TAP Agenda, TAP By Laws "Draft", Outreach Tool Kit, Members Handbook and the TAP members Bio Booklet.

Project #21414 & 21415 – TAP Space and Social Media were revised and updated on TAP Space.

Project #21404 & 21405 – Success Stories and Promotional Products; the subcommittee decided that the best use of money would be for Post It notes and pens to be used as marketing materials.

Success stories were all written and added to the annual report, Three were chosen and added to the Outreach Toolkit.

SBSE Toll Free

Project #22115 **Small Business Tax Workshop- IRS online workshop**

Harlan Barnett stated that this project has been completed. A preliminary copy was sent to Tonjua Menefee of SBSE Business Unit.

Tax Forms and Pubs

Project #22273 **Review of Form 1065 line 1a-1e without attachment.** Donald Thomas stated IRS assigned TFP projects that they had yet to complete. The committee decided to attach the documents that were comments by individual committee members to show how conclusions were reached. David Levine stated that the write up speaks to the issue. This is something the IRS should review.

Taxpayer Assistance Center

Project #19889 **Improving Access to Self-Serve Forms & Publications.** Barbara Baldwin stated that her committee developed a structured questionnaire that was used for visits to Taxpayer Assistance Centers. The committee visited 28 TACs in 13 states. Her committee members selected at least 1 TAC site to visit in each state. The findings were analyzed and categorized into various issues. There were 15 recommendations and 10 conclusions. Some conclusions were: the locations of the TACs were not located in areas with access for the elderly or the low income and limited English population; parking is also very expensive; office hours are not efficient; and, there are security check



lines slowing down access to the building. There are some offices that have self-assisted Kiosk computers that facilitate taxpayers' service.

Notices

Project #22626 **Fraudulent/Fabricated Forms W2 & Various Forms 1099s w/attachments** Ernest Miller stated that his committee completed their project for SBSE. A report was written and submitted with their ideas and attachments. His committee was tasked with reviewing fraudulent W2s and 1099s and submit ideas to prevent fraudulent submissions on income tax returns. He thanked the New York Office for their support.

IRS.gov website

Project #22675 EITC Website Review

Erica Webber stated that her subcommittee was tasked by EITC with reviewing the IRS.gov website and provided suggestions on how it can be friendlier to taxpayers.

The Joint Committee by consensus agreed to approve all projects.

Roy mentioned that his staff worked with the Communications Committee in developing a bio book for panel members. Going forward for 2012, each member will have a picture and bio. This will enable them to have better communication working with other members on various project committees.

Closing

Tom thanked the TAP staff, stating that they have been extremely professional and it has been a great year. He also stated that TAP members have done a lot for the taxpayers with the help of TAP staff.

Marianne thanked the panel members for their work including those that are rotating off this year.

John thanked the members and TAP Staff for their work.

Steve Thanked Tom and John for their leadership and the major changes on implementing the TAP Refocus Project work with the TAP staff.

Action Item: Tom wants to be informed when new members are assigned to mentors.

This was the last Joint Committee Teleconference for the year. The dates of the Joint Committee Meetings for 2012 will be decided at a later date.

**Taxpayer Advocacy Panel
Joint Committee
Meeting Minutes
October 27, 2011**

Designated Federal Official

- Marian Adams Acting TAP Director

Members Present

- Thomas (Tom) Walker TAP Chair
- John Kim TAP Vice Chair
- Gerald (Jerry) Stepner Chair, Area 1
- David Cain Chair, Area 2
- Susan Lynn Chair, Area 3
- Mary Jo Werner Chair, Area 4
- Ken Donnelly Chair, Area 5
- Anne Rasmussen Chair, Area 6
- Patricia O'Neill Chair, Area 7
- Harlan Barnett Chair, SBSE-Toll Free
- Herb Bohrer Chair, TAC
- Ernest Miller Chair, Notices
- Mary Jean Potenzzone Chair, SBSE-Practitioners Experience
- Donald Thomas Chair, Forms and Pubs
- Erica Webber Chair, EITC
- Susan DaCorte Chair, Communications

Members Absent

- Stephen Vanderver Chair, VITA

Staff Present

- Susan Gilbert Senior Program Analyst
- Linda Rivera Senior Program Analyst
- Russ Pool Database Analyst
- Otis Simpson Budget Analyst
- Louis Morizio Program Manager
- Nancy Ferree Program Manager
- Roy Block Program Manager
- Audrey Jenkins Program Analyst
- Marissa Program Analyst
- Donna Powers Program Analyst
- Tim Shepard Program Analyst
- Janice Spinks Program Analyst
- Nina Pang Program Analyst



- Carolynn Kublnick Secretary
- Kymberly Hand Secretary

Guests

- Jackie Rollins Vice Chair, Area 5 TAP
- Eboni Moss Area 5 TAP Member
- Sue Tatum EITC TAP Member
- JT (Zak) Manuszak Area 5 TAP Member
- Winnie Brown VITA Vice Chair

Members of the Public

None

Welcome/Announcements/Review Agenda

Tom Walker welcomed everyone to the meeting and reviewed the action items from the previous meeting. Kymberly Hand took roll call and quorum was met.

Walker requested to know if the TAP managers had sent an email to the membership for mentors for this year. All managers reported they had and they were getting a good response from the request.

Tom said he and John had discussed the performance sheet, but with TAP not having an official way of handling someone who was underperforming, it would be hard to have guidelines in place to use the performance sheets.

Steve Berkey provided the requirements for open meetings listed below:
Excluded activities of the open meeting regulation:

Preparatory work—meetings of two or more advisory members to solely to gather information, conduct research, analyze information, or draft position paper.

Administrative work—meetings of two or more advisory members solely to discuss administrative matters of the advisory committee or to receive administrative information from a designated federal official.

Berkey stated that for TAP January meetings, it was important to follow the guidelines since most meetings would not be able to have a federal notice due to the short turn-around from the Annual Meeting.

Joint Committee September Meeting Minutes

The full committee, by consensus, reviewed and approved the meeting minutes.

National Office Report

Marian reported that she was still trying to get a confirmation on several items that she has been working on. In addition, she is pushing to get TAP leadership on the commissioner's calendar to discuss the 2010 Annual Report and to get the final projects from the IRS.

TAP Chair Report

Tom announced and congratulated Eboni Moss as the 2012 TAP Chair and Jackie Rollins as the 2012 TAP Vice Chair.

Area Issues for Review

Area – None

Area 2 –

Issue #19155 – Increasing the Font and Numbering on Notices – David Cain – David provided background on the issue and stated the committee had updated the referral to include all notices not just this single notice.

Decision – the full committee, by consensus, decided to approve and elevate the issue to the IRS.

Area 3 – None

Area 4 – None

Area 5 – None

Area 6 – None

Area 7 –

Issue #20080 – VITA training materials should be simplified w/attachment – Patti O'Neill – Patti provided background on the issue and stated the committee had researched the similar Issue #16829 proposal and identified that Issue #20080 proposal is significantly different and should be raised to the IRS.

Several members suggested a change to the proposed solution to take out the complicated issue of the VITA military training.

Decision – the full committee, by consensus, decided to elevate and approve the issue with modifications to the proposed solutions.

Project Committee Review

Communication

None



SB/SE Practitioners Engagement

Project #19639 – Avoiding Appeals w/appendix – Mary Jean (MJ) Potenzzone – MJ provided background on the project and stated the suggestion was to educate the public and increase the communication and educational information passed out to the taxpayers.

Decision – the full committee, by consensus, decided to approve and elevate the project with modifications.

SB/SE Toll Free –

None

Tax Forms & Pubs –

Project #22271 – Review of Form 1120 and 1120S – Donald Thomas – David provided background on the project and stated the suggestion was for the IRS to ask for information that was on the 1040K form and that all of their suggestions and comments had been received by the IRS already.

Decision – the full committee, by consensus, decided to approve and elevate the project to the IRS.

Project #22273 – Review of Form 1065 – Donald Thomas – David provided background on the project and stated the suggestion was to eliminate line 1a and put it on page 2 and that all of their suggestions and comments had been received by the IRS already.

Several members did not like the suggestion of taking out the Item 1a because it appeared that the taxpayer did not earn any income, when they had.

Decision – the full committee, by consensus, decided to return the project to the committee for the committee to revisit the language of the proposal, but since the IRS had already received the comments, the project was approved and elevated.

Taxpayer Assistance Center (TAC)

None

Notices

None

EITC

Project #19408 – EITC Site Library – SueTatum – Sue provided background on the project and stated the committee had developed a library of slides for specific audience training.

Decision – the full committee, by consensus, decided to approve and elevate to the IRS.

Project #19409 – EITC Outreach and Educational Plan – Erica Webber – Erica provided background on the project and stated the suggestion was to promote better outreach to the taxpayers through better outreach outlets and to update the current outreach material.

Decision – the full committee, by consensus, decided to approve and elevate to the IRS.

VITA

None

AD HOC

None

TAP Refocus Update – Tom Walker

Tom stated he didn't have anything to update on the Refocus, but things are progressing along and as information became available it would be shared with the membership.

Steve Berkey reported that as things progress some things are coming up that will need attention, one item being the idea of how to catch issues that do not belong to a bucket.

QR Products – Harlan Barnett

Harlan provided the background on the products and explained the process of how the issues would be listed on the referral form. The groups' suggestion was to use the appendix idea like some projects are currently using.

Ken Donnally suggested adding date submitted at the top and adding page numbers to the referral form.

Harlan spoke about the TAP Development and Elevation Process, stating the group made the proper changes to reflect the bucket concept and suggest that one person from each project committee to be the Quality Review person for that committee and to be part of the Quality Review team, which will review other referrals from the other project committees.

Decision – the full committee, by consensus, decided to approve the referral form and process.

Imbedded Reporter – JT (Zak) Manuszak

Zak suggested that TAP look into having an imbedded reporter as an added panel member, they would have full member responsibilities, however; they would not replace a panel member position. The reporter would be able to write articles about what TAP was doing.

Several members thought this could have a positive and negative affect for TAP, because with a reporter being on the panel, TAP would be subjective to what the reporter wanted to write about and without having any say what the article placed TAP in a good or bad light. The membership would like to have more control over what the reporter would be able to write about.

Several staff and members brought up the fact that every meeting is open to the public and by charter TAP has to have open meetings.

Decision – the full committee, by consensus, decided that the idea of having an imbedded reporter is not a good idea, however, the idea would be explored by the communication committee to research.

Issues – Tom Walker/Marian Adams

Marian Adams announced that Nancy Ferree, Florida TAP Manager, would be retiring in January. Marian said she had already begun the procedures to get a replacement for her.

Projects – Tom Walker

Tom stated that all Joint Committee Members should have received a copy of the TAP member handbook by mail for review. The goal was to get the approval from the Joint Committee so it could be printed and available for the Annual Meeting.

Decision – the full committee, by consensus, decided to approve the handbook and it would be set for print.

Tom congratulated those who worked on the handbook and requested as members went through the handbook to report any changes to staff.

Recruitment – Steve Berkey

Steve announced the new member package had been sent to Treasury and TAP's Treasury representative had been provided copies of all the documents for review prior to receiving the complete package from the Commissioner. He said TAP was in a holding pattern and waiting for further information.

Committee Chair Reports – Tom Walker

Tom reminded all Committee Chairs to complete and send their reports to their perspective manager by end of November. This would allow the 2011 Annual Report to be submitted sooner than past years.

He asked to know if any areas had any other issues or responses from the IRS that still needed to be reviewed and approved.

There are two issues in Area 5, one would be rebutted, however, if the rebuttal wasn't received by the November Joint Committee call, the JC would close the issue and the other one would be closed.



Several project committees have smaller projects which will be completed and placed on the Joint Committee November meeting agenda for approval.

Public

None

Closing

Tom reminded everyone the next Joint Committee meeting would be held on Wednesday, November 23, 2011. He also stated that if Joint Committee members knew they were not going to be able to make the meeting to let him or Susan Gilbert know ahead of time to ensure quorum was met.

Harlan requested to know when and who would be presenting the new TAP Referral forms and style guide at the meeting.

Action Item: Tom and staff to discuss this offline.

Next Meeting: November 23, 2011 @ 2:00PM ET

**Taxpayer Advocacy Panel
Joint Committee
Meeting Minutes
September 22, 2011**

Designated Federal Official

- Shawn Collins TAP Director

Members Present

- Thomas (Tom) Walker TAP Chair
- John Kim TAP Vice Chair
- Gerald (Jerry) Stepner Chair, Area 1
- Mary Jo Werner Chair, Area 4
- Susan Lynn Chair, Area 3
- Harlan Barnett Chair, SBSE-Toll Free
- Ernest Miller Chair, Notices
- David Cain Chair, Area 2
- Donald Thomas Chair, Forms and Pubs
- Erica Webber Chair, EITC
- Anne Rasmussen Chair, Area 6
- Patricia (Patti) O'Neill Chair, Area 7

Members Absent

- Stephen Vanderver Chair, VITA
- Herb Bohrer Chair, TAC
- Susan DaCorte Chair, Communications
- Mary Jean Potenzzone Chair, SBSE-Practitioners Experience
- Ken Donnelly Chair, Area 5

Staff Present

- Steve Berkey Senior Program Analyst
- Susan Gilbert Senior Program Analyst
- Linda Rivera Senior Program Analyst
- Louis Morizio Program Manager
- Russ Pool Database Analyst
- Otis Simpson Budget Analyst
- Roy Block Program Manager
- Audrey Jenkins Program Analyst
- Marisa Knispel Program Analyst
- Lisa Gabriel Program Analyst
- Ellen Smiley Program Analyst
- Marianne Ayala Program Analyst
- Donna Powers Program Analyst
- Anita Fields Program Analyst



- Patti Robb Program Analyst
- Tim Shepard Program Analyst
- Leasia Brooks Secretary

Guests

- Eboni Moss Vice Chair, Area 3
- Jackie Rollins Vice Chair, Area 5
- Roger Lees Area 2

Members of the Public

None

Welcome/Announcements/Review Agenda

Tom Walker opened the meeting and welcomed everyone.

Roll Call

Leasia Brooks took roll call and quorum was met.

Approval August Joint Committee Meeting Minutes

Minutes were approved by consensus.

Review of Action Items – Tom Walker

Tom Walker reviewed the action items from the August call and reported all have been addressed.

National Office Report – Shawn Collins

Collins stated the Annual report hard copy has been received. Collins stated she is still in the planning stages for the IRS Commissioner meeting. A request has been sent to both the IRS Commissioner and NTA's office for dates/times for coordination with the TAP Chair and Vice Chair. NTA Nina E. Olson signed the recruitment package; TAP is currently awaiting the ethics letter from the General Legal Services. Once the letter is received from GLS, TAP may proceed with preparing the package for submission to The Department of Treasury.

The project proposal email has been sent with a deadline of October 14, 2011.

Collins commended the outgoing TAP members for their years of service.

Collins announced she will no longer be the TAP Director as of September 30, 2011.

TAP Chair Report – Tom Walker

Walker stated the Annual report is completed. Historically, the Annual report is handled by the prior year's Chair. Walker proposed the upcoming TAP Chair have the responsibility of submitting the report. For example, the 2012 Annual Report would be submitted by the 2012 TAP Chair.



Steve Berkey suggested a combined approach; the prior TAP chair completes a portion of the Annual report and the current TAP chair completes the remainder, including their signature on the cover letter.

Walker stated the committee will move forward with the combined approach.

Area Issues for Review

Issue# 17854 (Resubmission) – The committee suggested the election confirmation be automated by adding it as a feature in e-services or through a fax service.

Rodger Lees will submit the issue to the Area 2 Program Manager to be elevated to the IRS.

Action Item: Harlan Barnett will correct the form to read Area prior to submission.

Decision – The Joint Committee by consensus, approved the project with a few corrections.

Refocus Update

The proposed project list has been sent to the program owners. Walker stated TAP is moving forward on the Refocus.

David Cain suggested capturing responses from the IRS in the Area/Project meeting minutes.

Action Item: Harlan Barnett will forward Toll Free task force project information to Russ for publishing on TAPSpace.

TAP Style Guide

Harlan Barnett stated the style guide went from 24 to 27 pages to cover additional writing guidelines. Barnett requested approval from the Joint Committee to post the style guide and the new project form to TAPSpace. The Joint Committee by consensus approved the updated TAP style guide for publication and posting.

Election Update

TAP Chair nominees:

Roger Lees, Eboni Moss, Mary Jean Potenzzone, Cindi Williams.

TAP Vice Chair nominees:

Diedre Jackson, Jackie Rollins, Jerry Danci.

The Meet the Candidates call is scheduled for September, 30, 2011 at 1:00 p.m. (EST).

Action Item: Steven Berkey will send out a message to all members.

Mentor/Mentee

Berkey asked if there should be a call for mentor volunteers prior to receiving projects from the IRS and establishing project committees, or should the committee wait until November. John Kim suggested the Area committee managers go out to solicit volunteers; develop a preliminary listing for managers to be aware of members willing to become mentors.

Action Item: Area Managers will ask for volunteers to be mentors for 2012.

SB/SE

SBSE Commissioner requested that TAP submit projects of interest. Berkey requested all project suggestions be submitted to Thomas Walker no later than Monday, September 26, 2011.

Chair Training

Berkey stated the Annual meeting will end before noon Thursday. The Joint Committee will convene its initial meeting. The members of the screening committee will have a session. Outreach representatives will also have a meeting Thursday afternoon.

Action Item: Berkey will research open meeting requirements and report back to the Joint Committee next month.

Communication Membership & Chair Determination

Walker stated the Communications committee will be an additional obligation on a voluntary basis. If there are not enough volunteers, the Joint Committee will appoint members as needed. The Chair determination will be made at the Annual meeting.

Area/Project Committee Activities

The Project Committees provided a brief summary and status of projects worked.

Walker stressed that the traditional Area issues must be submitted no later than November.

Evaluation of Volunteers

Gerald Stepner expressed concern about active participation for some panel members. Stepner suggested expressing the importance of participation throughout the year at the new member orientation and periodic evaluations of panel members' performance/participation at the end of 16 or 18 months so corrective actions could be considered, if necessary.

Action Item: Harlan Barnett will send Thomas Walker a performance worksheet sample for review.

Committee Chair Reports

Walker requested reports be completed before the end of November.

Public

None



Closing
Meeting Adjourned.

Next Meeting: October 27, 2011.

**Taxpayer Advocacy Panel
Joint Committee
Meeting Minutes
August 25, 2011**

Designated Federal Official

- Shawn Collins TAP Director
- Steve Berkey Senior Program Analyst

Members Present

- Thomas (Tom) Walker TAP Chair
- John Kim TAP Vice Chair
- Gerald (Jerry) Stepner Chair, Area 1
- Susan Lynn Chair, Area 3
- Mary Jo Werner Chair, Area 4
- Ken Donnelly Chair, Area 5
- Harlan Barnett Chair, SBSE-Toll Free
- Herb Bohrer Chair, TAC
- Ernest Miller Chair, Notices
- Mary Jean Potenzzone Chair, SBSE-Practitioners Experience
- David Cain Chair, Area 2
- Donald Thomas Chair, Forms and Pubs
- Erica Webber Chair, EITC
- Stephen Vanderver Chair, VITA
- Susan DaCorte Chair, Communications

Members Absent

- Anne Rasmussen Chair, Area 6
- Patricia (Patti) O'Neill Chair, Area 7

Staff Present

- Susan Gilbert Senior Program Analyst
- Linda Rivera Senior Program Analyst
- Meredith Odom Program Analyst
- Russ Pool Database Analyst
- Otis Simpson Budget Analyst
- Nancy Ferree Program Manager
- Roy Block Program Manager
- Audrey Jenkins Program Analyst
- Marisa Knispel Program Analyst
- Lisa Gabriel Program Analyst
- Ellen Smiley Program Analyst
- Marianne Ayala Program Analyst



- Donna Powers Program Analyst
- Anita Fields Program Analyst
- Patti Robb Program Analyst
- Tim Shepard Program Analyst
- Leasia Brooks Secretary

Guests

- Rodger Lees Area 2
- Deidre Jackson Area 3

Members of the Public

None

Welcome/Announcements/Review Agenda

Tom Walker opened the meeting and welcomed everyone.

Roll Call

Leasia Brooks took roll call and quorum was met.

Approval July Joint Committee Meeting Minutes

Minutes were approved by consensus.

Review of Action Items—Tom Walker

Tom Walker reviewed the July meeting action items.

Action Item: Walker will send out guidelines of the information needed for the report previously requested from the chairs.

Walker stated the Annual report has been delayed due to difficulty in obtaining information from the Area Chairs. Area activities are winding down; Walker asked the chairs to summarize data and put a draft report together. Walker stated there will be a detailed discussion held at next month's call.

Action Item: Susan Gilbert will add the evaluation of member performances to next month's meeting agenda.

National Office Report—Steve Berkey

Berkey announced Linda Rivera, TAP Senior Analyst, will act as the Seattle, WA Manager.

The Annual report will be submitted to the printer no later than tomorrow. The project proposals have been given to NTA Nina E. Olson, and are awaiting approval for submission to the IRS. Berkey announced the tax forums have been effective sources of outreach for TAP.

TAP Chair Report – Tom Walker

Walker reminded members that IRS Live will be held Wednesday, August 31, 2011. Commissioner Douglas Shulman will open this year's IRS Live session.

Walker stated issues that require Joint Committee approval should be taken care of by the November Joint Committee call. Issues that need to be elevated to the IRS should be submitted prior to the Annual Meeting. The goal is to be 100 percent complete and closed on small issues by the Annual Meeting this year.

Berkey announced TIGTA is interested in receiving input from the Taxpayer Assistance Center Committee. TIGTA will be reviewing how the IRS can provide better alternatives for taxpayers to obtain information from the IRS to file their returns.

Action Item: Roy Block will schedule a meeting for Herb Bohrer with TIGTA to share his thoughts.

Area Issues for Review

Area 7

Issue #20080 VITA Training Should Be Simplified – John Kim provided a brief background on the issue, the committee's suggestion is to simplify the training guide by dividing the training into two sections: Basic and Advanced.

The committee expressed concern about the issue being rejected due to a previous similar issue that was submitted.

Decision – The Joint Committee by consensus, returned the issue to Area 7 for comparison with a previous VITA recommendation.

Action Item: Donna Powers will send Janice Spinks the VITA recommendation from last year, and the response received.

SB/SE

Project #19637 ICM Referral – Rodger Lees stated the committee's task was to evaluate the content, clarity, and script routing of IRS Intelligent Contact Management system scripts and messages that individual taxpayers encounter as a result of going through the examination process. The committee interacted with Carol Spencer to develop a method to track script changes, how it was evaluated, the current state in the ICM system, changes needed, and the final product.

The team developed the referral in three tiers:

- Evaluate the script/Make recommended changes
- Evaluate the flow of data through the ICM system
- Identify new Self-Help Items



Lees stated many of the script recommendations are being incorporated into an update that will occur within the ICM system in January 2012.

Decision – The Joint Committee, by consensus, approved the project to go final.

Action Item: Lees, Tim Sheperd and Harlan Barnett will meet on preparing the project for IRS presentation.

Project #19638 Suggested Improvements to Self-Help C.E. Toll Free Line – Diedre Jackson stated the committee’s task was to find additional Self-Help options to add to the existing script on the toll free line. The committee listened to the scripts as designed, as well as followed a written script to ensure the message was consistent. The committee also made test calls into the toll free line during low call volume times to get a feel of what taxpayers are experiencing relating to consistency of instructions, wait time, the overall ease of use, and customer service. The committee also analyzed the most recent customer satisfaction surveys to find out what issues were revealed in the surveys. The committee reviewed the information provided on the Phone Optimization Project (POP) Initiative for Fiscal Year (FY) 2009, and the National Quality Review System’s (NQRS) “Reason for Contact Report.”

The panel recommends the following new Self-Help options:

- Appendix A: Request for Extension of Time
- Appendix B: The Status of My Exam
- Appendix C: Development of Website & Social Media

Decision – The Joint Committee by consensus, approved the project.

Tax Forms & Pubs

Project #21325 Review of Publication 334

Project #21674 Review of Form 4562 – Donald Thomas stated the committee reviewed Form 4562, *Depreciation and Amortization* and Publication 334, *Tax Guide for Small Business*. Both have been submitted to the IRS.

The committee received notification that the SSA 1099 recommendation was adopted by the IRS and will be implemented on October 17, 2011. Publication 946, *How to Depreciate Property* has been submitted and is awaiting approval from the IRS. The committee is scheduled to have a focus group with the IRS on September 1, 2011.

Decision – The Joint Committee by consensus, approved the projects.

VITA

Project #19401 Improving Internal & External Awareness of FEAB – Stephen Vanderver stated there were three proposals by VITA: Financial Education Asset Building, Alternative Methods, and Training. The proposal is to survey successful key partners (both internal IRS and external IRS) to discover best practices, summarize these practices, and ensure these practices are shared with new partners or lesser performing partners to assist with program improvement.

The committee recommended rebranding FEAB as an effort to bring awareness to the program.

Decision – The Joint Committee by consensus, approved the project.

Project #19402 VITA Alternative Methods of Filing Returns – Stephen Vanderver provided a brief background of the issue, the committee’s suggestion is to find alternative methods to augment the VITA tax preparation site. Some suggestions included self-help kiosks, more vendors to participate, and to encourage the tax preparer community to do pro-bono tax preparation for taxpayers. As an incentive, IRS could develop a means of rewarding or recognizing pro-bono services provided.

The committee suggested expanding self-help programs with the VITA/TCE program. SPEC could engage companies, social organizations, large service or religious congregations, and similar groups to participate in the program. Eventually, these organizations could train participants versed in taxes and accounting or use VITA/TCE training programs and continue the program.

Decision – The Joint Committee by consensus, approved the project.

Project #21939 VITA Grant Application – Stephen Vanderver provided a brief background on the project. The committee’s suggestion is to allow FEAB Partners to use up to 5 percent of VITA Grant money towards offering or expanding FEAB services, which would include education and the development of training materials and/or FEAB services.

Decision – The Joint Committee by consensus, approved the project.

TAP Refocus

Walker stated he had the opportunity to participate in all seven Area calls. He stated he only received two comments in reference to change. Jackie Rollins asked if there would be an opportunity for members to be reassigned to a different committee mid-year. Walker opened the floor for Joint Committee consideration and discussion of the issue. The Joint Committee agreed reassignment will be approved on a case- by-case basis.

Walker stated the Communications Committee members suggested making the committee a standing committee with the chair serving as a member of the Joint Committee. Members also suggested that serving on the Communications Committee should be considered an additional obligation to serving on a project committee.



Decision – The Joint Committee, by consensus, approved modification to the Communications Committee.

TAP Style Guide

Harlan Barnett stated the TAP Style guide is in process and requested the committee provides corrections via email and will be reviewed during the September call.

Action Items: Susan Gilbert will add the TAP Style Guide discussion to the September Agenda.

Recruitment

Berkey stated there will be 23 new members next year. Eleven of the new members are from this year's new applicants. Twelve of the new members are from the alternate list. The list has gone forward for new member appointments and will be approved no later than mid-late October.

Mentor/Mentee

Walker stated mentors will be assigned through the project committee structure. Walker requested the TAP Managers inform each mentor that they are responsible for contacting the new members prior to the Annual meeting.

Action Item: Linda Rivera will establish a follow-up plan for the Mentor/Mentee program.

Annual Meeting

Susan Gilbert stated the member and staff team met on August 18, 2011, and finalized the agenda. The general meeting will begin on Tuesday and will consist of split plenaries. However, there will be classes everyone will attend to teach new procedures resulting from the Refocus. The general meeting will end on Thursday at 11:15. Everyone will be dismissed with the exception of Screening Committee members, Outreach Committee members, the new Joint Committee, and instructors for those sessions. Orientation will be Monday from one to five.

Berkey requested the members consider planning the Project dinners at the Annual Meeting.

Public

None

Closing

Meeting Adjourned.

Next Meeting: September 22, 2011.

**Taxpayer Advocacy Panel
Joint Committee Face-to-Face
Meeting Minutes
July 25 – 27, 2011**

Designated Federal Official

- Shawn Collins TAP Director

Members Present

- Thomas (Tom) Walker TAP Chair
- John Kim TAP Vice Chair
- Gerald (Jerry) Stepner Chair, Area 1
- David Cain Chair, Area 2
- Eboni Moss Vice Chair, Area 3
- Mary Jo Werner Chair, Area 4
- Ken Donnelly Chair, Area 5
- Anne Rasmussen Chair, Area 6
- Patricia (Patti) O'Neill Chair, Area 7
- Harlan Barnett Chair, SBSE-Toll Free
- Herb Bohrer Chair, TAC
- Ernest Miller Chair, Notices
- Erica Webber Chair, EITC
- Stephen Vanderver Chair, VITA
- Felicia Garant Vice Chair, Forms and Pubs

Members Absent

- Susan Lynn Chair, Area 3
- Donald Thomas Chair, Forms and Pubs
- Mary Jean Potenzzone Chair, SBSE-Practitioners Experience
- Susan DaCorte Chair, Communications

Staff Present

- Shawn Collins TAP Director
- Susan Gilbert Senior Program Analyst
- Steve Berkey Senior Program Analyst
- Russ Pool Database Analyst
- Otis Simpson Budget Analyst
- Judi Nicholas Program Manager
- Nancy Ferree Program Manager
- Roy Block Program Manager
- Tim Shepard Program Analyst
- Nina Pang Program Analyst
- Janice Spinks Program Analyst
- Leasia Brooks Secretary



- Kymberly Hand Secretary

Guests

- Deborah Momon-Townsend W&I Analyst
- Yvonne Smith W&I Analyst

Members of the Public

None

Welcome/Announcements/Review Agenda

Tom Walker opened the meeting and welcomed everyone.

Roll Call

Leasia Brooks took roll call and quorum was met.

Approval June Joint Committee Meeting Minutes

Minutes were approved by consensus.

Review of Action Items – Tom Walker

Tom Walker reviewed the action items from the June call and reported all have been completed.

National Office Report – Shawn Collins

Collins thanked the members for attending the Joint Committee face-to-face meeting. She thanked the program owners for their attendance at the meeting and stated TAP looks forward to working together.

Collins announced that Judi Nicholas, Seattle TAP Program Manager, is leaving TAP to take another position as the Senior Commissioner Representative for the Pacific Northwest.

Roy Block, Milwaukee TAP Program Manager, is retiring in December after 28 years of service.

TAP Chair Report – Tom Walker

Walker stated there is nothing to report this month.

Recruitment

Berkey stated this year's recruitment campaign was a success. There were 438 applications that were ranked by TAP Managers and Senior Analyst in May. The interview panels, which consisted of TAP members, LTAs, and TAP staff, interviewed over 100 applicants. Berkey reported there are 41 positions to fill next year. This year's recommendation list included 19 new applicants, 21 selected alternates from the previous years, and 45 alternates for the upcoming years. Collins presented the recommendation list to NTA Olson last week.

Annual Report Update

Susan DaCorte and Aileen Fisher are the primary authors of the Annual Report this year. Berkey stated the staff's role is to verify that the information in the report is accurate. Patti Robb is currently in the process of editing, and Otis Simpson is working with the IRS printing and publishing office to produce the final product. Berkey expects the report to be released no later than the end of August.

Commissioner's Meeting

Walker stated the Commissioner's meeting is where TAP delivers the Annual report to the IRS Commissioner. Walker requested each committee provide input in November prior to their term end.

Action Item: Walker will provide the form and guidelines of the information needed for the report.

Election Process

Anne Rasmussen, Gerald Stepner, and Susan Lynn will serve as the election committee for the Chair/Vice-Chair election this year. Berkey stated the process has been changed over the years and has worked well. He proposed the same process as last year be used. Berkey stated Collins will send out a call for candidates on August 26, 2011. There should be at least 2 candidates for each position. If not, the Area Committee chairs will serve as a nominating committee. All nomination announcements are due by September 9, 2011. A conference call for candidate speeches will be held and an election ballad will be sent for voting. The election will be held at the end of September. The Chair and Vice-Chair will be selected and in place by the end of October 2011.

TAP Refocus

National Taxpayer Advocate Nina E. Olson stated the entire federal government is facing significant budget cuts across the board. These budget cuts have many consequences to how the IRS conducts business, which makes it important to safeguard the taxpayer services.

NTA Olson stated some of the issues that have been elevated by TAP are not taxpayer service issues, but are issues that reflect the interests of the tax professional of TAP. The basic formation of the panel was for TAP to be a "listening post" in the taxpayer community, and to identify issues at the grassroots level that need to be elevated to the IRS.

NTA Olson stated the Area committee will return to being the listening post for grassroots issues. NTA Olson noted that the TAS Communications liaisons have been informed that they need to work more closely with TAP Analysts and TAP members to identify opportunities for outreach.



The Area committees will then review the issues identified and submit recommendations on key issues to the Joint Committee.

The primary role of the panel is to find opportunities for grassroots listening, review/sort issues into buckets, and make recommendations on projects.

The Joint Committee will have a number of proposed issues that have been identified by grassroots listening. They will identify a system to determine which projects will be submitted to the IRS. Every TAP member will serve on a project committee. This process will ensure TAP is remaining close to the original vision.

NTA Olson stated an Advisory Committee for tax professionals called the IRSAC already exists and if TAP tries to become another IRSAC then TAP would disappear due to it being a duplicate. NTA Olson stated part of TAP's outreach should provide the taxpayer with basic knowledge about the tax system. Olson explained tax professionals should be the minority on the panel and there to provide their expertise during discussions.

Olson stated over the next two years she would like to reduce the TAP to 74 members to align with TAS offices. NTA Olson also stated due to the current budget restraints and hiring freeze, she is unable to build up the TAP staff in order to better assist the TAP members.

With having only 74 members, each TAS office would have a TAP member aligned with that particular office to assist with bringing in the grassroots issues. TAP could then focus on what the needs are from different areas and get the word out about TAP to some of the remote areas.

Projects for Review: Notices

Project #21068 Review of CP Notices – Ernest Miller stated the committee was tasked with reviewing the CP Notices to provide the program owner feedback on clarity, structure, and a list of frequently asked questions (FAQs) that the average taxpayer may have once they have received one of the notices.

Decision – The Joint Committee by consensus, approved the project with minor corrections.

Project #19569 Review of Pub 946 – Felicia Garant stated the committee was asked to review Publication 946, How to Depreciate Property, and provide IRS program owners with feedback.

Decision – The Joint Committee by consensus, approved the project with minor corrections.

Project #21344 SB/SE Correspondence Exam Practitioner Engagement – Mary Jo Werner provided a brief description of the issue. The proposed solution is to implement a bar code on correspondence to streamline the letters tracking process.



Decision – The Joint Committee by consensus, approved the project.

Area Issues for Review

Area 2:

Issue #19155 Notice 1400-Alternate to Paper Filing Postcard Readability – David Cain provided a brief background on the issue, stating the committee’s suggestion is that the IRS increase font size for readability.

Decision – The Joint Committee by consensus, returned the issue to Area 2 for corrections and resubmission next month.

Area 4:

Issue #18611 Refund Delays on Electronically Filed Returns (Resubmission) –

Werner provided a brief background on the issue, stating the committee’s suggestion is to maximize the “Where’s My Refund” link on IRS.gov. Instead of using the terminology “Return Accepted” as the final communication from the IRS to a transmitter, use “Return in Processing” to indicate an active return. The Committee also suggests if processing is delayed and a refund delay is probable, IRS send a subsequent “Processing Delayed” message to the transmitter as well. Once processing is completed and a refund is issued, the final communication from the IRS to a transmitter would state “Return Completed”

Decision – The Joint Committee by consensus, elevated the issue to the IRS.

Issue #19138 Change Instructions for Form 720 (Resubmission) – Werner provided a brief background on the issue, stating the committee’s suggestion is to add a disclaimer to the estimated time for completion of Form 720 on page 17 to say “Estimated time for completion listed on page 17 may not be a reliable estimate for single activities listed in Part II of Form 720”.

Decision – The Joint Committee by consensus, elevated the issue to the IRS.

Issue #18851 E-Services Access to CP2000 (Resubmission) –

Werner provided a brief background on the issue, stating the committee’s suggestion is to allow e-services users who have filed a client’s Form 2848, Power of Attorney and Declaration of Representative, to obtain a copy of the client’s CP2000 through e-services by initiating an inquiry through Electronic Account Resolution.

Decision – The Joint Committee by consensus, elevated the issue to the IRS.

Area 5:

Issue #19764 Specific Payment Penalty Language in Form 1040 Instructions –

Kenneth Donnelly provided a brief background on the issue, the committee’s suggestion is to use the same information found in TeleTax for inclusion in the Forms 1040 family instructions, Publication 17, and other material covering tax payments.

Decision – The Joint Committee by consensus, elevated the issue to the IRS.



Walker requested active issues and issues the JC have not seen be added to the snap shop report. He also requested issues that have received a response from the IRS be closed or rebutted.

Action Item: Walker asked Cain to follow up on Issues 17259 and 17854.

TAP Measures & Consolidated Balanced Scorecard – Louis Morizio stated the original score card had too many quantitative measures and not enough qualitative measures. Judi Nicholas, Otis Simpson, and Morizio organized the balanced measures into four tabs. Morizio stated three of the four tabs relate directly to TAP’s mission statement. The fourth strategy is labeled Member Satisfaction.

Decision-The Joint Committee by consensus, approved the balance measures as TAP’s measurement tool.

TAP Style Guide – Harlan Barnett presented the members with the updated TAP Style guide. The committee suggested comparing the updated style guide with TAS current guide to ensure there are no discrepancies.

Discussion of Results

Barnett provided the Joint Committee with the Outreach Breakout discussion results. (See Attached Outreach Breakout minutes)

John Kim provided the Joint Committee with the Issue Screening Breakout discussion results. (See Attached Issue Screening minutes).

Patti ONeill provided the Joint Committee with the Project Breakout discussion results. (See Attached Project Breakout minutes).

The committee discussed electing a Vice-Chair/Outreach coordinator to assist with coordinating outreach opportunities.

There will be a discussion at the Leadership Conference in October as well as a session at the Annual Meeting on working with LTAs. Collins also stated that TAP will still have a LTA DFO. Collins will meet with NTA Olson on how TAP will make the transition.

The Annual meeting will consist of discussions that cover working with LTAs, workflow, outreach, and process flow. Walker requested the process flow and outreach discussions be scheduled as plenary sessions.

The committee agreed to submit 8 projects.

Public

None

Closing

Meeting Adjourned.



Next Meeting: August 25, 2011

Attachments (3):

Outreach Breakout Minutes

Issue Screening Breakout Minutes

Project Committee Breakout Minutes

**Taxpayer Advocacy Panel
Joint Committee
Meeting Minutes
June 23, 2011**

Designated Federal Official

- Shawn Collins TAP Director

Members Present

- Thomas (Tom) Walker TAP Chair
- John Kim TAP Vice Chair
- Gerald (Jerry) Stepner Chair, Area 1
- Susan Lynn Chair, Area 3
- Mary Jo Werner Chair, Area 4
- Anne Rasmussen Chair, Area 6
- Patricia (Patti) O'Neill Chair, Area 7
- Harlan Barnett Chair, SBSE-Toll Free
- Herb Bohrer Chair, TAC
- Ernest Miller Chair, Notices
- Mary Jean Potenzzone Chair, SBSE-Practitioners Experience
- David Cain Chair, Area 2
- Donald Thomas Chair, Forms and Pubs
- Erica Webber Chair, EITC
- Stephen Vanderver Chair, VITA

Members Absent

- Susan DaCorte Chair, Communications
- Ken Donnelly Chair, Area 5

Staff Present

- Shawn Collins TAP Director
- Susan Gilbert Senior Program Analyst
- Steve Berkey Senior Program Analyst
- Linda Rivera Senior Program Analyst
- Russ Pool Database Analyst
- Otis Simpson Budget Analyst
- Judi Nicholas Program Manager
- Nancy Ferree Program Manager
- Roy Block Program Manager
- Audrey Jenkins Program Analyst
- Marisa Knispel Program Analyst
- Lisa Gabriel Program Analyst
- Ellen Smiley Program Analyst
- Marianne Ayala Program Analyst



- Donna Powers Program Analyst
- Anita Fields Program Analyst
- Patti Robb Program Analyst
- Tim Shepard Program Analyst
- Leasia Brooks Secretary
- Annie Haywood Secretary

Guests

- Felicia Garant Area 1
- Bob Hayden Area 4
- Eileen Kelly Area 4
- Jackie Rollins Vice Chair, Area 5
- John Rodgers Area 7
- Colleen Hitchcock Area 6

Members of the Public

None

Welcome/Announcements/Review Agenda

Tom Walker opened the meeting and welcomed everyone.

Roll Call

Leasia Brooks took roll call and quorum was met.

Approval May Joint Committee Meeting Minutes

Minutes were approved by consensus.

Review of Action Items – Tom Walker

Tom Walker reviewed the action items from the May call and reported all have been completed.

National Office Report – Shawn Collins

Collins thanked the Joint Committee members for their faithful participation.

Collins stated TAP received verification that rooms are available for Wednesday night. She requested that the panel members contact Leasia Brooks to request an extended stay. Walker requested that the members adjust their schedule to remain in Seattle through noon on Wednesday. Collins also requested members consider leaving Thursday morning if same-day travel presents a problem.

TAP Chair Report – Tom Walker

Walker stated three Joint Committee members are needed to volunteer to assist with the election process for this year's election. Gerald Stepner, Susan Lynn, and Anne Rasmussen volunteered to assist. Berkey volunteered to coordinate the process.

Area Issues for Review

Area 1

Issue #18548 Explanation of Reporting Mutual Funds Dist. Of Short-Term Cap Gains

– Gerald Stepner provided a brief background on the issue, stating the committee's suggestion is that the IRS clarify instructions for taxpayers to report their short-term capital gains from Form 1099 DIV to Form 1040, Line 9 instead of erroneously reporting them on the Schedule D, and Line 13.

Decision – The Joint Committee, by consensus, elevated the issue to the IRS.

Issue #19705 E-Services Password – Gerald Stepner provided a brief background on the issue, stating the committee's suggestion is that the IRS either correct the instructions that states password renewal to E-services allows for more than eight characters, or actually allow more than eight characters to be used as stated in the current instruction.

Decision – The Joint Committee, by consensus, elevated the issue to the IRS with minor corrections.

Issue #19957 Status of Certain Grandchildren – Gerald Stepner provided a brief background on the issue, stating the committee's suggestion is that the IRS clarify whether step-grandchildren are legally eligible to be considered a qualifying child.

Decision – The Joint Committee, by consensus, elevated the issue to the IRS provided the issue has not been previously addressed and is not statute driven.

Action Item: Walker requested the committee ensure emphasis added to the technical consideration be bolded prior to submitting to the IRS.

Issue #20971 Enhance Form 13614-C – Gerald Stepner provided a brief background on the issue, stating the committee's suggestion is to add a question on Form 13614-C, Part III that asks the taxpayer "Do you have any capital loss carryovers from prior years?" This will allow taxpayers unfamiliar with this provision of the law to account for prior year losses.

Decision – The Joint Committee, by consensus, elevated the issue to the IRS with a minor adjustment.

Area 2

Issue #19605 Access to Identity Theft Information – Ernest Miller provided a brief background on the issue, stating the committee’s suggestion is to establish a shortcut link on the main IRS webpage www.irs.gov which would direct the taxpayers to the resources available to deal with identity theft.

Decision – The Joint Committee, by consensus, elevated the issue to the IRS with a minor adjustment.

Issue #17854 Develop an Easier Process to Obtain Election Confirmations – Donald Thomas provided a brief background on the issue, stating the committee’s suggestion is that the IRS implement fax over internet protocol to allow IRS agents the ability to fax documents from their desktop computer and additional website functionality to allow taxpayers to request, complete, and receive a confirmation status related to election forms via the IRS web services application.

The Committee further suggests the IRS implement the use of overnight shipping options for taxpayers at the taxpayer’s expense.

Decision – The Joint Committee, by consensus, elevated the issue to the IRS with minor corrections.

Area 4

Issue #18611 Refund Delays on Electronically Filed Returns – Bob Hayden provided a brief background on the issue, stating the committee’s suggestion is to maximize the “Where’s My Refund” link on IRS.gov. Instead of using the terminology “Return Accepted” as the final communication from the IRS to a transmitter, use “Return in Processing” to indicate an active return. The Committee also suggests if processing is delayed and a refund delay is probable, that the IRS send a subsequent “Processing Delayed” message to the transmitter as well. Once processing is completed and a refund is issued, the final communication from the IRS to a transmitter would state “Return Completed”

Decision – The Joint Committee, by consensus, returned the issue to Area 4 for resubmission next month.

Issue #18851 E-Service Access to CP2000 – Eileen Kelly provided a brief background on the issue, stating the committee’s suggestion is to allow e-services users who have filed a client’s Form 2848, *Power of Attorney and Declaration of Representative*, to obtain a copy of the client’s CP2000 through e-services by initiating an inquiry through Electronic Account Resolution (EAR).

Decision – The Joint Committee, by consensus, returned the issue to Area 4 for additional research and resubmission next month.

Action Items: Timothy Shepard will provide further reference. Roy Block requested Jackie Rollins provide a Wage and Income transcript and a CP2000 from a client for panel review. Block will ensure the documents are prepared for disclosure to the Joint Committee.

Issue #19138 Change Instructions for Form 720 – Bob Hayden provided a brief background on the issue, stating the committee’s suggestion is to add a disclaimer to the estimated time for completion of Form 720, page 17 to state “Estimated time for completion listed on page 17 may not be a reliable estimate for tanning bed operators”.

Decision – The Joint Committee, by consensus, returned the issue for further review.

Area 6

Issue #19286 Form 2290 – Colleen Hitchcock provided a brief background on the issue, stating the committee’s suggestion is that the IRS send out postcards and attach a removable name, address, and EIN number label if possible.

Decision – The Joint Committee, by consensus, elevated the issue to the IRS with minor corrections.

Area 7

Issue #17382 Retired on Disability – Unable to E-File (Resubmission) –

John Rodgers provided a brief background on the issue, stating the committee’s suggestion is that the IRS should remove the block presently in place preventing E-Filed income tax returns with zero adjusted gross income and/or zero tax liability.

Decision – The Joint Committee, by consensus, elevated the issue to the IRS.

Tax Forms & Pubs

Issue #20225 Review of 2011 Schedule C

Issue #20226 Review of 2011 Schedule E

Issue #20227 Review of 2011 Schedule D and Form 8949

Donald Thomas stated the committee completed reviews on Schedule C, Schedule, D, and Schedule E. In addition to the schedule D review, the committee reviewed Form 8949 which is intended to replace Schedule D1.

Decision – The Joint Committee, by consensus, approved the project to go final.

Notices

Issue #21127 Pub 594 Review – Ernest Miller stated the Committee was tasked with reviewing existing CP notices (CP30, CP63, CP20E, and CP15) and Frequently Asked Questions for clarity and to provide feedback on whether the taxpayer would clearly understand the reason a CP notice was received and what action would need to be taken. The committee also reviewed Publication 594. Miller stated the committee provided the program owners with draft copies and recommendations.

Decision – The Joint Committee, by consensus approved the project.

TAP Refocus Update – An e-mail update was sent to the full membership for review. Walker thanked the Area and Project Managers for reaching out to their committees.



Walker stated TAP is currently divided on the issue of assigning projects. However Tom stated, TAP is leaning more toward using the project committee assignment, but the role of the Area will be stressed in outreach, issue identification, and in issue bucket creation.

Tom asked everyone to provide feedback at the face-to-face Joint Committee.

Annual Meeting – Susan Gilbert stated the staff will meet June 30, 2011 to begin the Action Plan. The staff and members will meet July 7, 2011.

Area/Project Committee Activities

Gilbert requested the reports be sent in a timely manner. Walker also requested committees submit all available updates at the time reports are due. Walker stated there are nine active issues that have not been elevated to the Joint Committee. He requested issues be elevated for review no later than August.

Public

None

Closing

Meeting Adjourned.

Next Meeting: Face-to-Face, July 25-27, 2011 in Seattle, WA

**Taxpayer Advocacy Panel
Joint Committee
Meeting Minutes
May 26, 2011**

Designated Federal Official

- Steve Berkey Senior Program Analyst
- Shawn Collins TAP Director

Members Present

- Thomas (Tom) Walker TAP Chair
- John Kim TAP Vice Chair
- Gerald (Jerry) Stepner Chair, Area 1
- Susan Lynn Chair, Area 3
- Mary Jo Werner Chair, Area 4
- Ken Donnelly Chair, Area 5
- Jackie Rollins Vice Chair, Area 5
- Anne Rasmussen Chair, Area 6
- Patricia (Patti) O'Neill Chair, Area 7
- Harlan Barnett Chair, SBSE-Toll Free
- Herb Bohrer Chair, TAC
- Ernest Miller Chair, Notices
- Mary Jean Potenzzone Chair, SBSE-Practitioners Experience
- Susan DaCorte Chair, Communications

Members Absent

- David Cain Chair, Area 2
- Donald Thomas Chair, Forms and Pubs
- Erica Webber Chair, EITC
- Stephen Vanderver Chair, VITA

Staff Present

- Shawn Collins TAP Director
- Susan Gilbert Senior Program Analyst
- Linda Rivera Senior Program Analyst
- Russ Pool Database Analyst
- Otis Simpson Budget Analyst
- Judi Nicholas Program Manager
- Nancy Ferree Program Manager
- Roy Block Program Manager
- Audrey Jenkins Program Analyst
- Marisa Knispel Program Analyst
- Lisa Gabriel Program Analyst
- Ellen Smiley Program Analyst

- Marianne Ayala Program Analyst
- Donna Powers Program Analyst
- Anita Fields Program Analyst
- Patti Robb Program Analyst
- Tim Shepard Program Analyst
- Leasia Brooks Secretary
- Annie Haywood Secretary

Guests

None

Members of the Public

None

Welcome/Announcements/Review Agenda

Tom Walker opened the meeting and welcomed everyone.

Roll Call

Leasia Brooks took roll call and quorum was met.

Approval April Joint Committee Meeting Minutes

Minutes were approved by consensus.

Review of Action Items – Tom Walker

Tom Walker reviewed the action items from the April call and reported all have been completed.

National Office Report – Steve Berkey

All Project Committee face-to-face meetings have been held. Berkey requested that each Project Committee provide a brief overview on their face-to-face meetings during the Chair Reports at the end of the call.

TAP has completed the ranking phase and had a total of 439 applicants. TAP Managers and Shawn Collins met the second week in May to discuss recommended candidates. Berkey stated all recommended candidates have been approved for interviews, and a team of Managers will conduct interviews for 120 candidates in June. Berkey stated the goal is to complete the interview process and make recommendations to NTA Nina E. Olson by July. Tax check waiver forms will be sent to current members.

Berkey informed the Joint Committee that Issue 18158 was prematurely elevated to the IRS without final Joint Committee approval. The staff thought it was returned to the committee for edits only, and elevated the issue to the IRS without resubmitting it to the Joint Committee. The IRS rejected the recommendation.

Area 7 committee will review the IRS response during their June meeting. The revised recommendation will be included in the pre-reads for the next Joint Committee meeting. Berkey apologized for the misunderstanding and requested the Joint Committee accept the manner in which the issue is being handled.

TAP Chair Report – Tom Walker

Walker stated that TAP will soon hold its 2012 chair elections. Walker requested that third year members consider participating on the election committee.

As of last week, TAP had 17 issues that have received a response from the IRS, but have not been assigned a code. Walker requested that Area chairs, Analyst, and Managers work with members to assign codes as appropriate.

Walker will send out status updates on the reorganization next week. Walker requested that the TAP chairs keep members engaged as much as possible and encourage continued communication.

Area Issues for Review

Area 3

Issue #18165 Revocation or Withdrawal of Form 2848 POA & Declaration of Rep w/ 3 Attachments – Susan Lynn provided a brief background on the issue, stating the committee’s suggestion is the IRS correct the instructions on how to withdraw or revoke a Power of Attorney Form 2848.

Decision – The Joint Committee by consensus, elevated the issue to the IRS.

Area 5

Issue #19740 Checkbox for Tax Packages – Jackie Rollins provided a brief background on the issue, stating the committee’s suggestion is that the IRS insert a checkbox on the paper form for the next 3 to 5 years to give taxpayers an option to request the tax forms and instructions by mail. This will allow a transition period for taxpayers who paper file their tax returns.

Decision – The Joint Committee by consensus, returned the issue back to Area 5 for further discussion and resubmission in June.

Area 7

Issue #17382 Retired on Disability-Unable to E-File Individual Tax Return with Zero AGI – John Kim provided a brief background on the issue, stating the committee’s suggestion is that the IRS remove the block presently in place preventing income tax returns with zero adjusted gross income to be E-Filed.

The committee suggested clarification be made on the type of return that cannot be filed electronically.



Decision – The Joint Committee by consensus, returned the issue to Area 7 for further review and resubmission in June.

Issue #18802 – Revisions Needed to LLC Publications (attachment) – John Kim provided a brief background on the issue, stating the committee’s suggestion is to add specific language in Publication 3044 that states, if the LLC is a single member or sole proprietor LLC disregarded for income tax purposes, a balance sheet is not required. Kim commented that this will help prevent taxpayers from filing the incorrect form.

The committee suggested referencing the attachment in the issue referral write-up.

Decision – The Joint Committee by consensus, elevated the issue to the IRS with one adjustment.

Tax Forms & Pubs

Issue #20167 Review of Publication 544 – Marisa Knispel stated the committee conducted a review on Publication 544.

Decision – The Joint Committee by consensus, approved the project to go final.

Notices

Issue #21064 – Frequently Asked Questions for CP Notices – Ernest Miller stated during Notices face-to-face meeting in May, the committee was given three notices to review for clarity, and to provide possible FAQs taxpayers may have after reading the notice. The program owner was given a draft copy and will be provided the final copy.

Decision – The Joint Committee by consensus approved the project.

TAP Refocus

The Communications committee held its face-to-face meeting in May. The internal subcommittee worked as a focus group to discuss TAP’s reorganization process. Walker stated during the meeting, the group created a one-page process flow chart. National Taxpayer Advocate Nina E. Olson was given the one page write up along with the process flow for review and comments. Olson agreed with the majority of the package, but expressed concern about project assignment once a project has been accepted.

Walker stated Collins met with NTA Olson to discuss the members’ preference for project assignment. Walker also stated that once final approval is received, the Joint Committee will then have a framework for the new process.

Action Item: Walker will send out an update to the full membership next week. Walker will send a second update once final approval is given.

Notice 2011-39 Guidance Priority List – TAP Comment – Mary Jo Werner provided a brief background on the project. Werner stated a group of 17 items were filtered from over 310 recommended projects for submission to the Department of the Treasury, Tax



Policy Office IRS. A letter was drafted with the TAP Chair's signature to be forwarded to Secretary Timothy Geithner, Commissioner Douglas H. Shulman, and Shawn Collins.

Action Item: Walker stated all corrections must be submitted by May 27, 2011.

Decision – The Joint Committee by consensus approved the project with minor corrections.

Joint Committee Face-to-Face

The Joint Committee face-to-face meeting will be held July 25-27, 2011. July 27, 2011, will be considered a travel day. Walker requested for members to remain at the meeting until noon on the 27, if possible.

Annual Meeting

The Annual Meeting will be held at the Capitol Hilton in Washington D.C. on December 6 – 8, 2011. Orientation for new members will be on December 5, 2011.

Area/Project Committee Activities

John Kim requested that the Committees forward updates to the Joint Committee or Susan Gilbert.

Action Item: Walker requested Gilbert include the updates in the monthly Joint Committee pre-reads.

Project chairs provided the Joint Committee with a recap of their annual face-to-face meetings.

Public

None

Closing

Meeting Adjourned.

Next Meeting: June 23, 2011

**Taxpayer Advocacy Panel
Joint Committee
Meeting Minutes
April 28, 2011**

Designated Federal Official

- Shawn Collins TAP Director

Members Present

- Thomas (Tom) Walker TAP Chair
- John Kim TAP Vice Chair
- Gerald (Jerry) Stepner Chair, Area 1
- David Cain Chair, Area 2
- Ken Donnelly Chair, Area 5
- Patricia (Patti) O'Neill Chair, Area 7
- Mary Jean Potenzzone Chair, SBSE-Practitioners Experience
- Harlan Barnett Chair, SBSE-Toll Free
- Ernest Miller Chair, Notices
- Donald Thomas Chair, Forms and Pubs
- Stephen Vanderver Chair, VITA
- Susan DaCorte Chair, Communications
- Erica Webber Chair, EITC
- Sue Tatum Vice Chair, EITC
- Mary Jo Werner Chair, Area 4

Members Absent

- Anne Rasmussen Chair, Area 6
- Herb Bohrer Chair, TAC
- Susan Lynn Chair, Area 3

Staff Present

- Susan Gilbert Senior Program Analyst
- Steve Berkey Senior Program Analyst
- Linda Rivera Senior Program Analyst
- Russ Pool Database Analyst
- Judi Nicholas Program Manager
- Louis Morizio Program Manager
- Nancy Ferree Program Manager
- Roy Block Program Manager
- Audrey Jenkins Program Analyst
- Marisa Knispel Program Analyst
- Lisa Gabriel Program Analyst
- Ellen Smiley Program Analyst



- Marianne Ayala Program Analyst
- Donna Powers Program Analyst
- Patti Robb Program Analyst
- Janice Spinks Program Analyst
- Tim Shepard Program Analyst
- Leasia Brooks Secretary

Guests

- Cindy Williams Area 6 Panel Member
- Jackie Granger Area 4 Panel Member
- Bob Hayden Area 4 Panel Member
- Richard Balancia Area 5 Panel Member

Members of the Public

- Howard Margulies (Former TAP Member)

Welcome/Announcements/Review Agenda

Tom Walker opened the meeting and welcomed everyone.

Roll Call

Leasia Brooks took roll call and quorum was met.

Approval March Joint Committee Meeting Minutes

Minutes were approved by consensus with minor corrections.

Review of Action Items – Tom Walker

None

National Office Report – Shawn Collins

The Joint Committee face-to-face meeting will be held July 25 – 27, 2011, in Seattle, Washington. Travel days are July 24, 2011 and July 27, 2011.

The annual meeting will be held in Washington D.C. A meeting location has not yet been determined. Additional information will be provided as the date approaches.

Collins reported that the draft refocus recommendation from the staff was presented to NTA Nina E. Olson. NTA Olson was in agreement with the majority of the information provided. Collins stated TAP is still in the process of working certain issues in an effort to formalize the plan. Collins stated the main focus of the face-to-face Joint Committee meeting is to complete the reorganization plan.

Walker requested members remain at the Joint Committee meeting in Seattle, Washington on Wednesday through noon or as long as possible.

TAP Chair Report—Tom Walker

Walker commented TAP is currently doing a good job of pushing issues through the pipeline. Walker stated as of April 26, 2011 there are 10 issues rebutted to the IRS, 31 issues that have been sent to the IRS and are awaiting a response, 1 issue in Joint Committee quality review, 12 issues that TAP is monitoring IRS action, 8 issues on today's call, 4 issues that are being reworked by the Areas, 7 issues returned from IRS that have not been closed.

Walker requested Area Chairs and Area Managers that have active issues, issues in the above categories, or issues not yet elevated to the Joint Committee be completed and elevated to the IRS no later than the Joint Committee face-to-face meeting in July.

Area Issues for Review

Area 1

Issue #19594 Forms and Publications Search Engine on irs.gov—Marisa Knispel provided a brief background on the issue, stating the committee's suggestion is that the IRS update the search engine under the forms and publications section of irs.gov, so that it operates in the same manner as the search engine located on the main page of the website.

Decision – The Joint Committee by consensus elevated the issue to the IRS.

Area 2

Issue #17259 Form 1040 PDF – David Cain provided a brief background on the issue, stating the committee's suggestion is that the IRS correct Form 1040 PDF data requests by adding text boxes to lines 7, 15b, 16b, 19, 58, 62, and 64a.

Decision – The Joint Committee by consensus sent the issue back to the Area for corrections and resubmission in May.

Area 4

Issue #18434 Signature Clarification on Form 8868 – Bob Hayden provided a brief background on the issue, stating the committee's suggestion is to indicate in the instructions for Part 1 that a signature is not required, and in Part 2, specify that a signature is required. Also, on the second page, insert a line of text that states signature and verification must be completed for Part 2 only.

Decision – The Joint Committee by consensus elevated the issue to the IRS.

Issue #18632 Highlight e-filing in Form 2290 Instructions – Jackie Granger provided a brief background on the issue, stating the committee's suggestion is to change the sentence with new language by stating independent truckers are to file Form 2290 electronically. The new language should also state, "Once the return is accepted by the IRS, the stamp Schedule 1 will be available within 24 hours. For more information on e-files, visit www.irs.gov and search 2290 e-files. Electronic filing is encouraged and



available to all taxpayers. However, electronic filing is required for each return reporting 25 or more vehicles.”

Decision – The Joint Committee by consensus elevated the issue to the IRS.

Area 5

Issue #19035 Change Address on IRS Website—Richard Bilancia provided a brief background on the issue, stating the committee’s suggestion is for the IRS to implement a single place for individual taxpayers to use on the IRS website to change individual addresses.

Decision – The Joint Committee by consensus elevated the issue to the IRS.

Issue #19279 – Registered Letters Signed for by Company Officers (Resubmission)

– Ken Donnelly provided a brief background on the issue, stating the committee’s suggestion is that the IRS should mail critical notices (levy, seizure of property) as restricted delivery to the officers/owners of the company. Donnelly stated restricted delivery will ensure that the mail is only delivered to the person specified.

The committee expressed concern the process would be an additional burden to both the IRS and companies.

Decision—The Joint Committee by consensus did not elevate the issue to the IRS.

Area 6

Issue #16844 Offer in Compromise (OIC) Process Not Disclosed – Cindy Williams provided a brief background on the issue, stating the committee’s suggestion is to add to Publication 1, *Your Rights as a Taxpayer*, Publication 17, *Your Federal Income Tax*, and to the “*What if You Cannot Pay?*” section of the Form 1040, *U.S. Individual Income Tax Return*, a statement explaining an OIC. Although Publications 1 and 17 mention OIC, it is not fully explained.

Decision – The Joint Committee by consensus elevated the issue to the IRS.

Area 7

Issue #19116 Taxpayer Response – Discontinue Forms Requests – Patti O’Neill provided a brief background on the issue, stating the committee’s suggestion is for the IRS to close an issue when the taxpayer has provided all relevant information and facts to the IRS, or provide consistency by sending the forms to the taxpayer in the initial contact.

Decision – The Joint Committee by consensus elevated the issue to the IRS with corrections.

Project Committee Review

AD HOC

Issue #20173 Taxpayer Expectations – Marianne Ayala provided a brief background on the summary. Ayala stated once the results of the project are available, TAP will be provided with more information.

Decision – The Joint Committee by consensus approved the project for submission.

Refocus Update – Walker stated he was able to attend all seven Area calls. Walker shared his vision of the refocus with each of the Areas and developed a written draft. He has forwarded a draft copy to Steve, Shawn and John for review/comments. Walker stated upon TAP Staff review, TAP members will be given an opportunity to review and submit suggestions. Walker stated some major concerns raised were questions to whether or not TAP should assign Area committees to individual buckets. Another concern is minimizing costs within TAP. As a result, there may be a reduction in project committees. Walker encouraged everyone to submit suggestions to TAP.

Toll-Free Task Force Issues – Walker provided a brief background on the issue. The committee agreed the Toll-Free Task force should move forward with the issues.

Decision—Nancy Ferree and Harlan Barnett will create a timeline and present at the next meeting.

Notice 2011 39 Guidance Priority List – Walker provided a brief background on the issue. Walker asked if TAP would like to submit a response to the IRS for inclusion on the 2011-2012 Guidance Priority List. Responses are due to IRS no later than June 1, 2011. Responses would have to be approved by the Joint Committee prior to submission to IRS.

Decision – Mary Jo Werner, Patti O'Neill, and the Florida staff will address the issue on behalf of TAP and submit responses in May.

Recruitment Update – Steve Berkey stated as of today, TAP has 380 applications submitted. Ranking will be held in Washington D.C. next week. Interviews will take place in June. Berkey stated that the committee will ask for member assistance during the interview process. Berkey thanked members for their support during the application period in getting the word out to the public.

2010 Annual Meeting Roll-up Report – Susan Gilbert stated that she and Communications Committee members Tom Walker and Seth Flanders held a conference call on April 25, 2011, with Roy Block and Patti Robb attending and began working on the Annual Meeting agenda. The committee members will continue to work on the agenda during the Communications face-to-face meeting.



Project Committee Update – John Kim requested the remainder project committees submit their updates this week. Walker reminded the committees the purpose of the spreadsheet is for the Joint Committee to be able to review the status of projects during the monthly calls.

Public

Walker thanked Howard Margulies for joining the call.

Closing

Meeting Adjourned

Next Meeting: May 26, 2011 @ 2:00PM ET

**Taxpayer Advocacy Panel
Joint Committee
Meeting Minutes
March 24, 2011**

Designated Federal Official

- Shawn Collins TAP Director

Members Present

- Thomas (Tom) Walker TAP Chair
- John Kim TAP Vice Chair
- Gerald (Jerry) Stepner Chair, Area 1
- David Cain Chair, Area 2
- Susan Lynn Chair, Area 3
- Mary Jo Werner Chair, Area 4
- Ken Donnelly Chair, Area 5
- Anne Rasmussen Chair, Area 6
- Patricia (Patti) O'Neill Chair, Area 7
- Harlan Barnett Chair, SBSE-Toll Free
- Herb Bohrer Chair, TAC
- Ernest Miller Chair, Notices
- Mary Jean Potenzzone Chair, SBSE-Practitioners Experience
- Donald Thomas Chair, Forms and Pubs
- Stephen Vanderver Chair, VITA
- Susan DaCorte Chair, Communications
- Sue Tatum Vice Chair, EITC

Members Absent

- Erica Webber Chair, EITC

Staff Present

- Susan Gilbert Senior Program Analyst
- Steve Berkey Senior Program Analyst
- Linda Rivera Senior Program Analyst
- Russ Pool Database Analyst
- Otis Simpson Budget Analyst
- Judi Nicholas Program Manager
- Louis Morizio Program Manager
- Nancy Ferree Program Manager
- Roy Block Program Manager
- Audrey Jenkins Program Analyst
- Marisa Knispel Program Analyst
- Meredith Odom Program Analyst
- Lisa Gabriel Program Analyst

- Ellen Smiley Program Analyst
- Marianne Ayala Program Analyst
- Donna Powers Program Analyst
- Anita Fields Program Analyst
- Patti Robb Program Analyst
- Tim Shepard Program Analyst
- Leasia Brooks Secretary
- Rose Babb Secretary
- Annie Haywood Secretary

Guests

- Mark Bernstein Area 1 TAP Member
- Cheryl Morse Area 1 Vice Chair
- Diedra (DeDe) Jackson Area 3 TAP Member
- Ebony Moss Area 3 TAP Member
- Jackie Rollins Area 5 TAP Member
- Aileen Fisher Area 7 TAP Member

Members of the Public

None

Welcome/Announcements/Review Agenda

Tom Walker opened the meeting and welcomed everyone.

Roll Call

Leasia Brooks took roll call and quorum was met.

Approval February Joint Committee Meeting Minutes

Minutes were approved by consensus, with no changes.

Review of Action Items – Tom Walker

Tom Walker reviewed the action items from the February call and reported all have been completed.

National Office Report – Shawn Collins

No items from the National Office.

Shawn expressed how excited she is to return to TAP. She also thanked Steve Berkey for doing an outstanding job as the Acting TAP Director in her absence.

TAP Chair Report – Tom Walker

Walker commented on the QR report and elevated issues that are available for review and the report should be used as a management tool. Walker asked that Managers assist Area Chairs in turning items around either for JC consideration or closure. Walker indicated the goal is for items to be elevated to the IRS and approved.

Walker stated that he, John Kim, Shawn, and Steve met with NTA, Nina Olson. Walker reported from the meeting that the Area face-to-face meetings are cancelled due to TAP budget restraints. Project committees are not affected. Walker apologized if his previous e-mail message regarding the cancellation of the area meetings was unclear.

Strategic Plan

Walker provided a brief background on the issue and opened the floor for questions and comments.

Walker stated sections of the strategic plan are already in process and have been implemented.

Decision – The Joint Committee by consensus will implement the Strategic Plan.

Area Issues for Review

Area 1

Issue #17063 – Power of Attorney for Substitute for Return – Mark Bernstein provided a brief background on the issue, stating the committee’s suggestion is to minimize the number of power of attorneys needed for joint filing along with a provision for subsequent filing in the case of objection by one party. Also to get the IRS to acknowledge and allow a power of attorney signed by both taxpayers to be valid for both or either taxpayer.

A correction raised by David Cain and Mary Jean Potenzzone was accepted and the comment should be added for future reference or any confusion as to what exactly was requested. “The Referral Solution recommended should only apply to Forms, 2848, POAs executed after the issuance of the PFRs.”

Decision – The Joint Committee by consensus elevated the issue to the IRS with an insertion.

Area 4

Issue #18396 – Revise Form W-4 w/attachment – Mary Jo Werner provided a brief background on the issue, stating the committee’s suggestion is to modify the Form W-4 by adding language to allow reduction in federal tax withholding.

Decision – The Joint Committee by consensus elevated the issue to the IRS.

Area 5

Issue #18628 – Change ACS Letter 1085 w/attachments Jackie Rollins provided a brief background on the issue, stating the committee’s suggestion is to use the standardized ICS version instead of the ACS’s computer generated letter.

Decision – The Joint Committee by consensus elevated the issue to the IRS.

Area 7

Issue #17315 – Incorrect Processing of Retirement Income form Sch. K-1 (Form 1065) Aileen Fisher provided a brief background on the issue, stating the committee's suggestion is to make Line I a check box to indicate whether or not the partner has a retirement plan, have it subject to transcription for computer processing, and modify the matching program.

Decision – The Joint Committee by consensus elevated the issue to the IRS.

Issue #17381 – Free Electronically Filed Tax Returns Patti ONeill provided brief background on the issue, stating the corrections in the resubmission focus on the benefits and barriers separately, making the issue clearer.

David Cain commented that electronic filing is a cost benefit. He also stated there is a 15 percent error rate on paper filing versus a .5 percent on returns filed electronically.

Decision – The Joint Committee by consensus elevated the issue to the IRS with corrections.

Issue #18158 – Multiple Notices Are Sent For the Same Issue ONeill provided a brief background on the issue, stating the committee's suggestion is to merge multiple inquiries on prior quarters into one notice.

The committee expressed concern that with the change, the taxpayer may confuse the combined notices as copies and ignore them.

Roy Block explained the IRS considers each quarter as a separate return.

Decision – The Committee will return the issue to the Area to conduct further research for resubmission next month.

Project Committee Review

Tax Forms & Pubs

Issue #20165 Review of Schedule F and Instruction – Donald Thomas provided a brief background on the project. Thomas asked if there were any questions or comments.

Action Item: Harlan Barnett will send the document to Marisa Knispel for format changes. The Committee will also review line items for accuracy.

Decision – The Joint Committee by consensus approved the project for submission to the program owner.

Issue #20166 Review of Publication 502 – Walker opened the floor for questions and comments. There were no questions or comments.



Decision – The Joint Committee by consensus approved the project for submission to the program owner.

Notices

Issue #18995 – Frequently Asked Questions for CP Notices

Issue #19823 – Frequently Asked Questions for 9 CP Notices

Issue #19826 – Frequently Asked Questions for 14 CP Notices – Ernest Miller provided a brief background on the project. Miller stated projects 19826, 19823, and 19826 are all related to one single project that will be completed in phases. All three projects have the same benefits and barriers.

Action Item: Barnett will send Issues #18995 and #19823 to Audrey Jenkins for corrections and format changes.

Decision – The Joint Committee by consensus approved the projects for submission to the program owner with a few corrections.

Toll-Free Task Force Issues – Herb Bohrer and Barnett provided a brief background on the issue, committee suggestion is to review the IRS response to the NTA on this Most Serious Problem, as well as toll-free issues identified to TAP.

Recruitment Update

Berkey stated the TAP recruiting campaign opened March 14, 2011 and the Recruiting News Release went out on March 23, 2011. During the first week of recruitment 60 applications were completed. To assist TAP members in the recruitment effort, members were provided recruiting promotional material for use in outreach efforts. Berkey stated TAP will do specific targeted recruiting in those areas with low recruiting numbers and will need TAP members to assist in those particular areas.

2010 Annual Meeting Roll-up Report

Susan Gilbert stated the feedback from the evaluation forms were received and will serve as the 1st step in planning the next annual meeting. Gilbert thanked Rose Babb for her assistance on the project.

Area/Project Committee Activities

Action Item: Walker asked the Project Committees to submit an update to Kim 10 days prior to the monthly conference call.

TAP Refocus

Walker made an announcement that the decision had been made by Nina Olson that the TAP focus would be changing. The Area Committees would concentrate on outreach and gathering issues. The Joint Committee would determine what issues would be developed. More information will be coming as the details are worked out.

Public

None



Closing
Meeting Adjourned

Next Meeting: April 28, 2011 @ 2:00PM ET



**Taxpayer Advocacy Panel
Joint Committee
Meeting Minutes
February 24, 2011**

Designated Federal Official

- Steve Berkey Acting TAP Director

Members Present

- Thomas (Tom) Walker TAP Chair
- John Kim TAP Vice Chair
- Gerald (Jerry) Stepner Chair, Area 1
- David Cain Chair, Area 2
- Susan Lynn Chair, Area 3
- Mary Jo Werner Chair, Area 4
- Ken Donnelly Chair, Area 5
- Anne Rasmussen Chair, Area 6
- Patricia O'Neill Chair, Area 7
- Harlan Barnett Chair, SBSE-Toll Free
- Herb Bohrer Chair, TAC
- Ernest Miller Chair, Notices
- Mary Jean Potenzzone Chair, SBSE-Practitioners Experience
- Donald Thomas Chair, Forms and Pubs
- Erica Webber Chair, EITC
- Stephen Vanderver Chair, VITA (in part)

Members Absent

- Susan DaCorte Chair, Communications

Staff Present

- Susan Gilbert Senior Program Analyst
- Linda Rivera Senior Program Analyst
- Russ Pool Database Analyst
- Otis Simpson Budget Analyst
- Judi Nicholas Program Manager
- Louis Morizio Program Manager
- Nancy Ferree Program Manager
- Roy Block Program Manager
- Audrey Jenkins Program Analyst
- Marisa Knispel Program Analyst
- Lisa Gabriel Program Analyst
- Ellen Smiley Program Analyst
- Marianne Ayala Program Analyst
- Patti Robb Program Analyst



- Tim Shepard Program Analyst
- Leasia Brooks Secretary
- Kymberly Hand Secretary
- Annie Haywood Secretary

Guests

- Cindi Williams Area 6 TAP Member
- Lee Battershell Area 7 TAP Member
- Mark Bernstein Area 1 TAP Member
- Jackie Rollins Area 5 TAP Member
- Cheryl Morse Area 1 Vice, Chair
- PK Purkayastha Area 4 TAP Member
- Gerald Janci Area 3 TAP Member
- Diedra (DeDe) Jackson Area 3 TAP Member
- Tim Greiner Treasury Inspector General for Tax Administration (TIGTA)

Members of the Public

None

Welcome/Announcements/Review Agenda

Tom Walker opened the meeting and welcomed everyone.

Roll Call

Kymberly Hand took roll call and quorum was met.

Approval January Joint Committee Meeting Minutes

Minutes were approved, by consensus, with no changes.

Review of Action Items – Tom Walker

Tom Walker reviewed the action items from the January call and reported all have been completed.

National Office Report – Steve Berkey

Steve announced the arrival of Leasia Brooks, the National Office Secretary, who will be providing support to the Joint Committee.

Steve announced Shawn Collins, TAP Director, would be returning at the end of the month.

Steve stated the Joint Committee Face to Face location cannot be finalized until the government has a finalized budget.

Steve stated that TIGTA is conducting a review on IRS customer service and is attending TAP conference calls to see what taxpayers are saying to TAP. Steve introduced Tim Greiner with TITGA and Tim provided a brief background about himself.

TAP Chair Report – Tom Walker

Tom reminded the Chairs that when writing a referral they should take every opportunity to show the value of TAP's service to taxpayers and the IRS.

Tom talked about the results from the W&I teleconference phone calls with TAP members. Steve reported that staff was compiling the data and would provide the results to the Joint Committee at the March meeting.

Area Issues for Review

Area 1 – Marisa Knispel

Issue #17063—Power of Attorney for Substitute for Return—Mark Bernstein provided a brief background on the issue, stating the committee's suggestion is to allow taxpayers filing joint returns to request a Power of Attorney allowing one representative to discuss tax issues for both parties in that tax year.

During the discussion members expressed concern that this is a not a systemic issue and expressed concerns there may be a legal barrier between the IRS and taxpayers.

Decision – the Joint Committee, by consensus, returned the issue to the area committee for further work.

Issue #17787—Chart vs. Worksheet for Figuring Standard Deduction—Jerry Stepner provided a brief background on the issue, stating the committee's suggestion is to replace the worksheet with the standard deduction chart in the instructions.

Decision – the Joint Committee, by consensus, elevated the issue to the IRS with minor modifications.

Area 2 – Audrey Jenkins

Issue #16718—Timely Acknowledgement of Receipt of Taxpayer Submissions—Ernest Miller provided a brief background on the issue, stating the committee recommends the IRS create a standard letter to send to taxpayers that acknowledges receipt of requested documentation and provides an estimated IRS response date.

Action Item: Tom Walker will email Audrey with some minor proofreading corrections.

Decision – the Joint Committee, by consensus, elevated the issue to the IRS with minor corrections.

Issue #17081—Toll-Free # Location in the Instructions of the Form 1040 Series—David Cain provided a brief background on the issue, stating the committee's suggestion is to move the toll free number from the current location of the Commissioners Statement to



the Introduction section of the instructions for the 1040, 1040EZ and 1040A to make it more accessible.

Decision – the Joint Committee, by consensus, elevated the issue to the IRS.

Area 3 – Donna Powers

Issue #17723 – POA-Delay in Processing (Resubmission) – Susan Lynn provided a brief background on the issue, stating the committee’s suggestion is for the IRS to process Powers of Attorney forms in a more timely fashion.

Decision – this issue originated in 2010, but will be reported in the 2011 TAP annual report.

Decision – the Joint Committee, by consensus, elevated this issue to IRS.

Area 4 – Ellen Smiley

Issue #18396 – Revise Form W-4 w/attachment – PK provided a brief background on the issue, stating that the committee’s suggestion is to allow taxpayers to stop federal income withholding if they have met their full tax obligation for the year.

Discussion between Joint Committee members presented a mixed review of the issue. Some felt the issue was a non-issue and would be rejected by the IRS and others felt strongly about the issue and defended it.

Decision – the Joint Committee, by consensus, returned the issue to the area committee to further discuss the issue and to review the Joint Committee’s concerns.

Issue #18798 – Creation of Separate PO Box – Mary Jo Werner provided a brief background on the issue, stating the committee’s suggestion is to have the IRS create a designated post office box for amended returns from federally declared disaster areas to speed up the processing.

Decision – the Joint Committee, by consensus, elevated this issue to IRS with minor corrections.

Area 5 – Patti Robb

Issue #19279 – Registered Letters Signed for by Company Officer—Ken Donnelly provided a brief background on the issue, stating the committee’s suggestion is to have IRS send critical notices directly to the principals of the company for guaranteed receipt.

A discussion ensued among the Joint Committee members who had varying thoughts on the issue.



Decision – the Joint Committee, by consensus, returned the issue to the area for additional discussion and to consider the Joint Committee’s comments.

Area 6 – Tim Shepard

Issue #17282-A – Offer in Compromise (OIC) Appeal, No Decision by the IRS for more than a year w/attachments (Resubmission) – Cindi Williams provided a brief background on the issue, stating the committee’s suggestion is to have IRS change the OIC Appeal letter wording to better reflect the timeframe between filing an appeal and first contact by an appeals office.

Decision – the Joint Committee, by consensus, elevated the issue to the IRS.

Project Committee Review

None

Notices

#19823 – Frequently Asked Questions for 9 CP Notices –

Decision – the Joint Committee did not receive the pre-read information so issue will be pushed to March meeting.

#19826 – Frequently Asked Questions for 14 CP Notices –

Decision – the Joint Committee did not receive the pre-read information so issue will be pushed to March meeting.

Action Item: Review Notice projects in March meeting.

Task Force on Correspondence Audits/Exams

Mary Jean Potenzzone provided a brief history on the task force, providing reasons why the taskforce was formed and the task force has prepared a position paper describing what TAP members have been hearing about the problems with correspondence examinations. Mary Jean stated that several members of the National Taxpayer Advocate’s staff have provided comments on the white paper since correspondence examinations have been a most serious problem mentioned in several of her Annual Reports to Congress.

Decision—the Joint Committee, by consensus, forwarded the position paper to the IRS. Tom Walker and Steve Berkey will decide who within the IRS should receive the document.

Tom thanked the taskforce and expressed appreciation for their hard work on the paper.

Toll – Free Line Issues

An area 6 subcommittee had a number of toll-free issues and opted to work them collectively. The thought was that submitting these issues as one single issue, rather than individually, would have greater impact. Harlan Barnett and Herb Bohrer have gathered information about the number of TAP toll free issues. There are currently about 48 issues within the TAP areas. They recommend creating a taskforce to consider and elevate the issues collectively.

Tom suggested the task force have at least one panel member from each area.

Action Item: Area Chairs will contact their members and solicit interest.

Decision: The Florida office will support the task force.

Strategic Plan

Cheryl Morse reviewed the TAP Strategic Plan:

She stated the following items have already been implemented:

- Streamlining the Face to Face meeting scheduling
- Ensuring each area is represented on each project committee
- Establishing a work process in TAPSpace
- Establishing a mentoring program

She stated the following items are still being worked:

- Formalizing information sharing between outgoing members and their replacements
- Increasing information sharing across areas
- Maintaining a “Grass Roots” approach
- Identify backup personnel for each TAP staff member
- Adding Ad Hoc committees to TAP staff

Action Item: Joint Committee members will review the strategic plan and email comments to one of the members of the Strategic Plan. The plan and comments will be discussed at the March Joint Committee meeting.

Issue Rebuttals

Tom requested that the Area provide a response within 60 days after receipt of the IRS response. It is also recommended Areas initiate a dialog between TAP and IRS to discuss the IRS response prior to a written rebuttal.

Steve discussed his conversation with Patty Wagner, where he had voiced TAP members concerns about rebuttal responses. Patty advised that TAP should go to the next level in the IRS if they feel like the issue warrants another look by someone different within the IRS.

Area/Project Committee Activities



John Kim requested the Chairs provide him with their committee update at least two weeks prior to the Joint Committee meeting.

Public

Tim Greiner, from TIGTA expressed appreciation for the opportunity to sit in on the call.

Closing

Steve Berkey expressed his thanks to the Joint Committee for their support during his time as Acting Director.

Meeting Adjourned

Next Meeting: March 24, 2011 @ 2:00PM ET



- Anita Fields Program Analyst
- Kymberly Hand Secretary
- Annie Haywood Secretary
- Rose Babb Secretary

Guests

- Cindi Williams Panel Member, Area 6
- Lee Battershell Panel Member, Area 7
- Allen Murry Panel Member, Area 1
- Marsha Simmons Local Taxpayer Advocate, NH
- Jeff Eppler Senior Tax Analyst
- Ben Shackelford Program Analyst
- Jeffrey Steinberg Panel Member, VITA
- Francis Johnson Panel Member, Area 2

Welcome/Announcements/Review Agenda

Tom Walker opened the meeting and welcomed everyone.

Roll Call

Kymberly Hand took roll call and quorum was met.

Approval November Joint Committee Meeting Minutes

Minutes were approved, by consensus, with no changes.

November 23, 2010 JC Meeting Minutes

Action Items

Issue #17932 – Back Year Returns for Non-Filers to be presented with modifications. (See below)

Issue #18414 – Checks Received and Processed before Paperwork to be presented with modifications. (See below)

The full committee decided, by consensus, to approve the schedule for next year's face to face meetings. Staff will discuss this issue and will come back to the Joint Committee.

December 10 JC Meeting Minutes

Action Items

Louis will email the SAMS PowerPoint presentation to the JC.

National Office Report – Steve Berkey

- Steve reported that during his meeting with Nina Olson, National Taxpayer Advocate, she stated that she would not be doing the TAP/TAS town hall meetings this year. Her primary focus this year will be on tax reform which requires legislation and TAP is not chartered to address legislative issues. However, if a town hall meeting is held in an area near a TAP member; the member will be invited to come and provide a brief overview of TAP.

- Steve reported that the TAP measures proposal; was reviewed by TAS staff that have experience in writing measures. The TAP team is reviewing the comments and will be working to finalize the measures.
- Steve stated Nina Olson agreed with the TAP staff recommendation to extend the TAP alternate term from two years to three years. The change will reduce the number of states where TAP conducts recruitment.
- Steve reported that new member recruitment would begin on March 14, 2011 through April 29, 2011. He stated more information would be forthcoming.
- Steve stated he also met with Patty Wagner, the IRS TAP Liaison who is interested in improving the work relationship between TAP and W&I and SBSE. He stated more information would be shared at a later time.
- Steve mentioned that there are a number of toll-free line issues that TAP receives and because of the broad nature of the issue TAP has not worked these issues. He would like the Joint Committee to consider a team similar to the Correspondence Examination team, which would pull together all the toll-free issues and create a report that would be submitted to the IRS.

Action Item: The JC will take this under consideration and will come back to the staff with a decision.

TAP Chair Report – Tom Walker

- Tom requested that Judi email the December chair training notes to the Joint Committee members.
- Tom reminded panel members about EITC Awareness Day and encouraged them to get involved if possible.
- Tom reported the TAP member distribution list is in the final stages and should be going out soon.
- Tom commended Chairs on their committee accomplishments; there are nine issues on the agenda for approval. In past years, there have been no issues for review at the January meeting.

Action Item: Steve will email Joint Committee members the Federal Advisory Committee Act (FACA) article regarding the importance and value of FACA Committees.

TAP Input on Taxpayer Expectations for W&I Reporting Compliance – Jeff Eppler and Ben Shackelford

- Steve introduced Jeff Eppler and Ben Shackelford and provided a brief background on what is needed of TAP members.
- Jeff stated W&I has started a process of developing a new philosophy for measurement of customer satisfaction within W&I Reporting Compliance in the following functions:
 - Examination
 - Underreporter
 - Innocent Spouse Program

- He stated they have developed 17 examples of what they believe are the customers' expectations when contacted by the IRS or when they contact the IRS by phone or paper.
- Ben stated they needed TAP's help to validate the 17 expectations, identify any expectations not on the list and to determine the value of each expectation relative to each other.
- He stated to accomplish this they recommended convening a couple of focus groups of 10 to 12 people to review the expectations and to go through the three perspectives of each expectation during a 60 to 90 minute teleconference call.

Action Item: Each Area Chair will email area panel members requesting three volunteers to assist with this project. The Area Chair will submit names to Nancy Ferree by February 1, 2011.

Area Issues for Review

Area 1 – Louis Morizio

Issue #18414—Checks Received and Processed before Paperwork – Louis provided a brief background on the issue, stating at the last Joint Committee it was recommended the issue be reworked, however the committee opted to send the issue forward without reworking it.

Decision: The JC, by consensus, approved the issue for elevation to the IRS.

Area 2 – Ernest Miller

Issue #16718—Timely Acknowledgement of Receipt of Taxpayer Submissions – Ernest provided a brief background on the issue, stating the goal is to have IRS establish a minimum response letter that will notify the taxpayer of receipt of documents.

Decision: The JC, by consensus, will review the issue after the committee has completed corrections identified during the discussion.

Action Item: Tom and Harlan Barnett will send their formatting and other comments to Audrey Jenkins.

Issue #17932 – Back Year Returns for Non-Filers – Francis Johnson – Francis provided a brief background on the issue, stating the solution is to place a link on the IRS website directing non-filers to resources they need and include the information in Publication 17 and the Form 1040 instructions.

Decision: The Joint Committee, by consensus, approved the issue for elevation to the IRS after edits are completed.

Area 4 – Mary Jo Werner

Issue #16851 – Federal/State Tax Law Confusion – Mary Jo provided a brief background on the issue, stating the recommendation is to have the IRS modify the instructions to the



federal tax law update adding a sentence to indicate state tax law may be different than federal tax law.

Decision: The Joint Committee, by consensus, approved the issue for elevation to the IRS after edits are completed.

Issue #17392 – Statement on Levy w/attachment – Mary Jo provided a brief background on the issue, stating the recommendation is to provide clearer information to the employer about the total amount owed by the employee.

Decision: The Joint Committee, by consensus, directed the area committee to rework the recommendation and bring back for approval.

Area 6 – Cindi Williams

Issue #17282 – Part A/attachments – Cindi provided a brief background on the issue, stating the recommendation is to modify the notice to inform the taxpayer they may not hear from their appeals officer for several months.

Issue #17282 – Part B/attachments – Cindi provided a brief background on the issue, stating the recommendation is to allow the Taxpayer Advocate Service to intervene on behalf of the taxpayer in extreme hardships. The intervention would expedite the appeal of the Offer-in-Compromise.

Decision: The Joint Committee, by consensus, approved the issue for elevation after the area combines the two issues into one referral.

Area 7 – Patti O'Neill

Issue #16841 – Fast Track Settlement – Lee Battershell – Lee provided a brief background on the issue, stating the recommendation is to specifically state in the Internal Revenue Manual that the Fast Track Settlement is available in Correspondence Exam and include the Publication 3605 in the initial correspondence with the taxpayer.

Decision: The Joint Committee, by consensus, approved elevation of the issue to IRS.

Issue #17381 – Free Electronically Filed Tax Returns – Patti provided a brief background on the issue, stating the recommendation is to have the IRS go to a completely free e-file system and not have the limitations based on income levels.

Decision: The Joint Committee, by consensus, approved the issue for elevation to the IRS after the edits are completed.

Issue #17384 – E-Filing Name Match Process – Lee Battershell provided a brief background on the issue, stating the recommendation is to have the IRS notify the taxpayer if the IRS needs to change their name in the IRS database so the taxpayer knows how to list their name on the returns.

Decision: The Joint Committee, by consensus, approved the issue for elevation to IRS after the edits are completed.

Project Committee Review

Tax Forms and Pubs – Donald Thomas

Donald provided a brief description of what the project committee is currently working:

- Reviewing Publication 502 and Publication 542 with a completion date of 03/15/2011
- Reviewing Publication 946 and Schedule S with Instructions
- Received response back from IRS on their review of Publication 15A with the IRS accepting half of their recommendations.

Issue #18540 – Review of Form 706 and its Instructions—Donald provided a brief background on the project, stating the project committee submitted their comments to the IRS Program Owner.

Decision: The Joint Committee, by consensus approved the project recommendations.

Dollars vs. Dollars and Cents w/attachments—Donald provided a brief background on the project, stating the recommendation to the IRS is to round up to the nearest dollar instead of entering dollars and cents.

Decision: The Joint Committee, by consensus, approved elevation of the project to the IRS after the edits are completed.

Closing out Issues – Tom Walker

Tom reminded all Area and Project Committee Chairs to review and close out issue responses received from the IRS no later than 60 days from date of receipt.

Reports – Russ Pool/Louis Morizio

- Russ Pool stated he had provided a list of the different reports, by name and description that TAP analysts can provide to the Area Chair.
- Tom stated if Area Chairs and Project Chairs needed information but could not find what they needed in the list of reports, they should request the information from Russ Pool and copy Tom Walker and John Kim on the email.
- Tom spoke about the Issues Elevated Cross Tab Report, which provides a brief snapshot of where all issues are in the elevation process. He also mentioned the Quality Review report which provides a complete detailed analysis of each issue and where it is in the elevation process.
- Tom stated if Area or Project Chairs wanted to see the report every week to request the reports from himself and John Kim. If Area chairs have any comments regarding the reports to send an email to Russ Pool with copy to Tom and John.
- Russ stated the reports can be divided into areas and projects.
- John Kim mentioned that the reports are sent out in Excel format, so the data can be manipulated easily.

- Steve reported that Phase Two for TAPSpace will be rolled out at the end of January with the document library and discussion area.

Action Item: The Issues Elevated Cross Tab Report and Quality Review Report will be provided as a pre-read item at every meeting.

Style Guide for QR – Harlan Barnett

- Harlan stated that at the request of the TAP chair, he had reviewed the TAP Style Guide. He recommended, and the TAP chair agreed, that TAP use the same style guide that was distributed to all panel members at the Annual Meeting.

Project Committee Assignments for 2011 – Project Committee Chairs

Communications – Susan DaCorte reports the following:

- Working on the TAP Annual Report
- Taking inquiries from Senator Letters
- Sending out new Biography books
- Waiting for TAPSpace roll out to complete

EITC – Erica Webber reported that the project committee has been divided into two subcommittees:

- Slide library power point subcommittee
- Outreach and education subcommittee

Notices – Ernest Miller reported that the committee is working on the following task which will be an ongoing project:

The Notices Landing page on IRS.gov

SBSE – Toll Free – Harlan Barnett reported the project has been divided into two subcommittees:

- Intelligent Contact Management (ICM)
- Automated Self-Help
- SBSE–Practitioners Experience – Mary Jean (MJ) Potenzzone reports the committee will be focused on improving services for practitioners when working with Correspondence Examinations.

TAC – Herb Bohrer reported that the committee is working on the availability of forms at TACs.

VITA – At the request of the VITA Chair, John Kim reported that the committee is working on:

- Reviewing Training Material
- Improving Financial/Educational Services
- Explore options to extend alternative filing methods

(John reported for VITA because he had received updated information.)



Action Item: As items change within the project, Project Chairs are to send John Kim a brief description of the change. John will provide a spreadsheet with the updates as a pre-read at every meeting

Action Item: Forms and Pubs Chair will provide John Kim a brief description of what the project committee is working on this year.

Area Committee Activities – All Area Committee Chairs took a moment to comment on the progress of their committees which are focused on training the new panel members and doing a lot of outreach.

Public Input

Marsha Simmons, LTA, NH—she stated she appreciated the opportunity to join the call and hear all the issues that TAP is working.

Closing

Meeting Adjourned

Next Meeting: February 24, 2011 @ 2:00PM ET