

## **2012 Meeting Minutes Taxpayer Burden Reduction**

- November 21, 2012
  - October 17, 2012
  - September 19, 2012
  - August 15, 2012
  - July 18, 2012
  - June 20, 2012
  - May 1 – 2, 2012
  - April 18, 2012
  - February 15, 2012
  - January 18, 2012
- 

### **Taxpayer Burden Reduction Project Committee Teleconference Wednesday, November 21, 2012**

#### **Program Owners**

- Tuzynski, Laurie – Senior TBR Advisor (Absent)

#### **Designated Federal Official**

- Juncewicz, Tina – LTA, North Carolina (Absent)
- Morizio, Louis – Program Manager

#### **Committee Members Present**

- Flanders, Seth, Chair
- Kennerty, Michael
- Pinilis, Russell
- Mikhail, Boris
- Williams, Cindi, Vice Chair

#### **Committee Members Absent**

- Hayes, Herb
- George, Philip
- Jackson, Deidre
- Mikhail, Boris
- Rodriguez, Luis

#### **Taxpayer Advocacy Panel Staff**

- Jenkins, Audrey Y – Program Analyst
- Odom, Meredith – Program Analyst

**Other Staff – TAS and TBR**

- Wells, Tara – TAS Analyst

**Public Participants**

- None

**Welcome/Announcements**

Flanders welcomed the members to the last TBR teleconference call for 2012.

**DFO Report**

Juncewicz was absent and Morizio acted as the DFO. Morizio said that the National Taxpayer Advocate, Nina Olson is preparing her report for Congress. In Olson's report she will note the 20 most serious tax problems. Olson will provide an update that will be shared with TAP members in January 2013.

**Acting TAP Director's Comments**

Todaro thanked the members for their service as TAP volunteers. She mentioned that 2012 has been a challenging year for TAP's integration into Systemic Advocacy. However, Todaro informed members that TAP has put together an excellent program for the Annual Face to Face meeting the week of December 3. Now that most of the changes are in place, she expects 2013 to be a very exciting year for the TAP and the TAP Staff.

**Subcommittee Report – Out****Technology Improvement**

Flanders did not have anything new to report. He stated that his subcommittee recommendation has been sent to the IRS for approval.

**Process Improvement**

Williams mentioned that there her subcommittee was well written except for some minor clarifications on the audit report.

**Outreach Report (OR)**

No outreach report was presented at this teleconference call however, Morizo reminded the members of the purpose of the spreadsheet. He mentioned that the outreach spreadsheet has two sections; one for outreach and the other to record the hours spend on OR Activities.

**Recruitment Update**

Morizio informed members that TAP has not yet received the approval from the Department of Treasury to appoint the new members for 2013, but he noted that the decision will be made within the next few days of this teleconference.

**Public Participation**

Tara Wells did not have any comments but, found the meeting very informative.

**Closing**

Flanders thanked everyone for joining the teleconference. He thanked the TBR members for their work on all the projects. Flanders also thanked the support staff and program owners for their support for on TBR projects. This meeting concluded all teleconferences for 2012. TAP members will have their annual Face to Face Meeting the week of December 3 in three locations simultaneously – Oakland, CA, Jacksonville and Plantation, FL.



**Taxpayer Advocacy Panel (TAP)**  
**Taxpayer Burden Reduction Project Committee**  
**Teleconference**  
**Wednesday, October 17, 2012**

**Program Owners**

- Tuzynski, Laurie – Senior TBR Advisor (Absent)

**Designated Federal Official**

- Juncewicz, Tina – LTA, North Carolina

**Committee Members Present**

- Flanders, Seth, Chair
- George, Philip
- Kennerty, Michael
- Mikhail, Boris
- Rodriguez, Luis

**Committee Members Absent**

- Hayes, Herb
- Jackson, Deidre
- Pinilis, Russell
- Williams, Cindi, Vice Chair

**Taxpayer Advocacy Panel Staff**

- Babb, Rose A. – Management Assistant
- Jenkins, Audrey Y – Program Analyst
- Odom, Meredith – Program Analyst

**Other Staff – TAS and TBR**

- Blair, Judy – SA Analyst
- Marsh, Nadine – TAS Tax Analyst
- Menefee, Tonjua – SBSE Senior Tax Analyst
- Wells, Tara – TAS Analyst

**Public Participants**

None

**Welcome/Announcements**

Flanders welcomed all to the teleconference and informed everyone since there is no quorum, this meeting is administrative.

**DFO Report**

Juncewicz welcomed everyone. She stated that the IRS.gov webpage has a new look. Changes have been made to the website's tabs and navigation. However,

the “Information” link in the upper right corner is similar to the tabs as on the old web page. Taxpayers can now find more useful information.

### **TBR Program Office Update**

Tuzynski was not present for this meeting, but Menefee mentioned on her behalf that her office is waiting for the TBR Official Report.

### **Subcommittee Report – Out**

#### **Technology Improvement**

Seth mentioned that his Subcommittee has received comments from the Joint Committee Quality Review. Most of the feedback was minor, focusing on word choice and grammatical consistency. The committee accepted most of the suggestions. This report will now go to the Joint Committee teleconference meeting on October 24.

#### **Process Improvement**

Luis stated that his subcommittee has incorporated their comments from the panel members into his draft report. The feedback was a survey request that was subsequent to the September teleconference call to all members. Rodriguez’s report will be presented at the Joint Committee Meeting in November.

### **Outreach Report**

No outreach report was presented at this teleconference call

### **Recruitment Update**

Jenkins provided an update on TAP recruitment. TAP Staff is still awaiting the response from the Treasury Department on the status of the 2013 applicants. The members and applicants will be notified when the final selections are made.

### **Public Participation**

There were no members of the public

### **Closing**

Flanders thanked everyone for joining the teleconference. The next teleconference call will be held on November 21, 2012 at 2:30 p.m. Eastern Standard Time.



**Taxpayer Advocacy Panel (TAP)**  
**Taxpayer Burden Reduction Project Committee**  
**Teleconference**  
**Wednesday, September 19, 2012**

**Program Owners**

- Tuzynski, Laurie – Senior TBR Advisor

**Designated Federal Official**

- Juncewicz, Tina – LTA, North Carolina

**Committee Members Present**

- Flanders, Seth
- George, Philip
- Hayes, Robert
- Jackson, Diedre
- Kennerty, Michael
- Mikhail, Boris
- Pinilis, Russell
- Rodriguez, Luis

**Committee Members Absent**

- Pinilis, Russell
- Williams, Cindi

**Taxpayer Advocacy Panel Staff**

- Babb, Rose A. – Management Assistant
- Odom, Meredith – Program Analyst

**Other Staff – TAS and TBR**

- Foley, Barbara – W & I Analyst
- Marsh, Nadine – TAS Tax Analyst
- Menefee, Tonjua – SBSE Senior Tax Analyst
- San Juan, Eric – TAS Analyst

**Public Participants**

None

**Welcome/Announcements**

Flanders welcomed all to the teleconference and stated the following to the members:

- Members should mark their calendar for TAP's Annual Face to Face meeting the week of December 3 through the 7. Three locations have been identified for these meetings, Plantation, FL, Jacksonville, FL and

Seattle, WA. There are two groups visiting each city; the first group of members will be arriving on Monday, December 3 through December 5 and the second group will arrive Wednesday, December 5 through Friday, December 7. Flanders also informed members that the details are now being worked out and will have an update for members at the next teleconference in October.

### **DFO Report**

Juncewicz welcomed everyone to the teleconference, she did not have much to report however, she informed members that the IRS Return Preparer s' Office has a new Director – Carol Campbell. Ms. Campbell was the former IRS Deputy Chief of Staff and a former Counsel to the National Taxpayer Advocate.

### **Program Office Update**

Tuzynski stated that there was not much to report at this teleconference. Her office is tasked to come up with some Burden Reduction Initiatives and to subsequently provide a final Submission to the Office of Management & Budget and the Department of Treasury. Tuzynski stated she could not discuss the details of the assignment at this time.

### **Subcommittee Report – Out**

#### **Technology Improvement**

Flanders asked members to comment on the IRS E-File/ Free-file review and recommendations referral. There were no significant changes noted by the members; just a few minor edits. The committee approved this project to send to the Joint Committee Quality Review.

#### **Process Improvement**

Rodriguez presented his committee project as well and asked members for their comments. He proposed that a survey questionnaire form be sent to all project committees. Rodriguez mentioned that this survey will better address the issues in the referral. Odom will send the survey forms to the Analyst of each project committee to distribute to the members. A deadline has been established to return the survey 7 days from the date received.

### **Outreach Report**

Flanders mentioned to the members to continue to send in outreach monthly reports even if there were no outreaches just to inform the staff about hours spent working on all TAP activities. In addition, ensure the spreadsheets are filled out correctly.

### **TAP Recruitment Update – 2013**

Morizio informed members that the National Taxpayer Advocate, Nina Olson is currently reviewing the selection package for new and alternate applicants.



Subsequent to Olson's review, the package will be sent to the Department of Treasury for final approval.

**Public Participation**

There were no members of the public.

**Closing**

Flanders thanked everyone for joining the teleconference. The next teleconference call will be held on October 17, 2012 at 2:30 p.m. Eastern Standard Time.





**Taxpayer Advocacy Panel (TAP)  
Taxpayer Burden Reduction Project Committee  
Teleconference  
August 15, 2012**

**Program Owners**

- Tuzynski, Laurie – Senior TBR Advisor

**Designated Federal Official**

- Juncewicz, Tina – LTA, North Carolina (Absent)
- Morizio, Louis – TAP Program Manager – Acting DFO

**Committee Members Present**

- Flanders, Seth
- George, Philip
- Kennerty, Michael
- Mikhail, Boris
- Rodriguez, Luis

**Committee Members Absent**

- Jackson, Diedre
- Pinilis, Russell
- Williams, Cindi

**Taxpayer Advocacy Panel Staff**

- Babb, Rose A. – Management Assistant
- Odom, Meredith – Program Analyst

**Other Staff – TAS and TBR**

- Marsh, Nadine – Tax Analyst
- Blair, Judy – SA Analyst
- Juan, San Eric – SA Analyst

**Public Participants**

- None

**Welcome/Announcements**

Flanders welcomed all to the teleconference; he did not have any new announcements for this meeting. Quorum was met.

**DFO Report**

Morizio acted as the DFO, he stated that several TAP Analysts are working on the Annual Report to Congress – 20 Most Serious Problems.

### **Program Office Update**

Tuzynski stated that there was not much to report at this teleconference. She is working with the IRS, LMB and Treasury Department to forward some significant initiatives. Tuzniski did not discuss the details on these initiatives, but mentioned that her office is working with IRS Counsel on some initiatives that may require legislation. She received lots of responses from taxpayers on some of the items that did not go forward. Tuzynski will take another look at those items.

### **SA Analyst Report**

Blair stated that her office is working on Individual Taxpayer Identification Number, ITIN issues that are input in Systemic Advocacy Management Systems, SAMS database. National Taxpayer Advocate, Nina Olson and Deputy Commissioner of Services and Enforcement, Steve Miller would like to have a round table discussion with tax practitioners. The roundtable discussion is based on the Treasury Inspector General Tax Administration (TIGTA) report; "TIGTA's audit found that IRS management has not established adequate internal controls to detect and prevent the assignment of an ITIN to individuals submitting questionable applications". Blair noted that NTA, Olson does not agree with the TIGTA report.

### **Subcommittee Report – Out Technology Improvement**

Flanders reported out that the final touches on E-file and Free file will be sent out by August 16 for members to review. There will be a subcommittee call on August 28 to discuss the report. Members were asked to review the report prior to the teleconference.

### **Process Improvement**

Rodriguez reported that he is working on a deadline for submission by September 30. He also mentioned that he would like to have comments from members submitted to him by August 31.

### **Joint Committee Update**

Flanders provided an update to members from the JC meeting:

- The JC have put forward the idea along with some members' suggestions to have all face to face meetings held in December. The goal would be to have the meetings at similar times to have the advantage of addressing various groups simultaneously. This proposed idea is subject to approval by the EDSA and NTA.
- Notices, Communications, Taxpayer Assistance Centers, Tax Forms and Publications and the Toll Free Project Committees will be proposed for 2013. Members were asked to think about other project committees they would like to establish for 2013.

**Outreach Report**

Flanders mentioned to members that they should continue with their outreach efforts and to submit their reports to Odom in a timely manner. Reports should be submitted even if there was no outreach to report the time spent on TAP activities.

**Recruitment Update**

Morizio mentioned that the preliminary selections were made for 2013. The final decisions will be made by Rena Girankis, Nina Olson and ultimately the Treasury Department, who will appoint those selected to serve on the panel.

Panel members were sent an email with- Form 13013-D, Tax Check Waiver. Members were asked to return this information in a timely manner to Linda Rivera in the National Office.

**Public Participation**

There were no members of the public.

**Closing**

Flanders thanked everyone for joining the teleconference.

**The next teleconference call will be held on September 19, 2012**

**Taxpayer Advocacy Panel (TAP)  
Taxpayer Burden Reduction  
Monthly Conference Call  
July 18, 2012**

**Designated Federal Officer**

- |                   |                |                         |
|-------------------|----------------|-------------------------|
| • Juncewicz, Tina | Greensboro, NC | Local Taxpayer Advocate |
|-------------------|----------------|-------------------------|

**Committee Members Present**

- |                     |                  |            |
|---------------------|------------------|------------|
| • Flanders, Seth    | Emmaus, PA       | Chair      |
| • Cindi Williams    | Summerset, SD    | Vice-Chair |
| • Kennerty, Michael | Atlanta, GA      | Member     |
| • Rodriguez, Luis   | Forest Hills, NY | Member     |

**Members Absent**

- |                    |                 |        |
|--------------------|-----------------|--------|
| • Harrison, Deidre | Mandeville, AL  | Member |
| • Hayes, Herbert   | Huntsville, AL  | Member |
| • Mikhail, Boris   | Lindenhurst, NY | Member |
| • Pinilis, Russell | Montclair, NJ   | Member |

**TAP Staff**

- |                   |                  |                         |
|-------------------|------------------|-------------------------|
| • Morizio, Louis  | Brooklyn, NY     | TAP Manager             |
| • Knispel, Marisa | Brooklyn, NY     | Primary Program Analyst |
| • Brown, Kevin    | Washington, D.C. | Secretary               |

**Guests/Program Owners**

- |                    |                    |
|--------------------|--------------------|
| • Tuzynski, Laurie | Senior TBR Advisor |
| • Blair, Judy      | Program Analyst    |
| • San Juan, Eric   | Attorney Advisor   |

**Welcome/Opening**

Seth Flanders welcomed everyone to the call. He announced that Susan Bentley, Hawaii, resigned.

**DFO Report**

Tina Juncewicz said she will send Knispel the link to the NTA's 2013 Objectives for her to share with the full Committee.

**Taxpayer Burden Reduction (TBR) Update**

Laurie Tuzynski said that at the end of June the Office of Management and Budget (OMB) sent all government agencies a report as a reminder about the Paperwork Reduction Act. OMB is specifically looking at paperwork and reporting. The Program Owners will accept ideas from the members. Taxpayer burden, Tuzynski added, is measured differently for business than for individual taxpayers. Knispel asked her to see if the TBR measures the burden that some forms and/or publications cause those who file them. She said yes and

that she is actually in the process of working with TFP on the time consumption (burden) to complete or file some forms.

Juncewicz said they are trying to develop a tool to see how new forms would score from a burden perspective. She is planning to put it on the IRS internal website for employees to be able to use but it is not ready yet.

Flanders suggested asking the TAP managers to send a message to the entire TAP to see if they have any ideas or suggestions.

### **Subcommittee Report-Out**

#### **Technology Improvement**

Seth Flanders said the subcommittee has nothing for review at this time. The documents should be assembled for review by the end of the month.

#### **Processes Improvement**

Luis Rodriguez said they have been reaching out to various stakeholders with a draft audit survey to solicit comments. Targeted audiences were chosen to make the survey even better and progress is ongoing. We hope to make a list of people who will continue to give their opinion for a more in-depth survey for future improvements. This will help determine which issues are most prominent. There is no proposed time line for the completion of this project.

### **Information for this Year's Annual Meeting**

Flanders asked members for ideas on how to improve the virtual Annual Meeting. What kind of format works better? He said that the Joint Committee will consider ideas and thoughts for the planning of this event.

Flanders and Rodriguez indicated that it would be good to receive an agenda earlier in the process. Williams talked about how helpful webinars would be in lieu of a face-to-face meeting.

Flanders said he would provide a Joint Committee report for the August meeting.

### **Outreach**

Williams noted that we are still not allowed to hand out anything that would be considered a giveaway, only the Speak Up trifold.

### **Action Item**

Flanders will continue to do the chair duties for the Technology Improvement subcommittee since Susan Bentley resigned.

### **Closing**

The identity theft issue will be tabled until the next tax filing cycle.



**Next Meeting: Wednesday, August 15, 2012, 2:30 pm ET, 1:30 pm CT, 12:30 pm MT, 11:30 am PT**

**Taxpayer Advocacy Panel (TAP)  
Taxpayer Burden Reduction  
Wednesday, June 20, 2012  
2:30 – 3:30 pm (EDT)**

**Program Owners**

- Tuzynski, Laurie – Senior TBR Advisor
- Chambers-Brown, Barbara - CSO-SLHQ Technical Advisor, SBSE

**Designated Federal Official**

- Juncewicz, Tina

**Committee Members Present**

- Bentley, Susan
- Flanders, Seth
- George, Philip
- Harrison, Diedre
- Kennerty, Michael
- Mikhail, Boris
- Williams, Cindi

**Committee Members Absent**

- Hayes, Herbert
- Pinilis, Russell
- Rodriguez, Luis

**Taxpayer Advocacy Panel /SA Staff**

- Babb, Rose A.
- Blair, Judy
- Morizio, Louis
- Odom, Meredith
- San Juan, Eric

**Public Attendees**

- None

**Welcome/Announcements**

Flanders welcomed all to the TBR Teleconference.

**DFO Report**

Juncewicz reported that the IRS News Releases discusses the expansion of the Fresh Start Initiatives” by the Commissioner. This program enables taxpayers to get the assistance they need for their economic hardship. The IRS has also relaxed some of its computations, thus enabling the taxpayers to be eligible for Offers in Compromises.

The IRS is closing 43 small offices – they are not walk-in centers; some of those 43 offices will be consolidated with other offices.

### **TBR Office Update**

Tuzynski welcomed all to the teleconference and mentioned that her office is working on a number of issues:

- Form 13285A – External Suggestion. A new form was approved by the Office of Management Budget, OMB and is now available on IRS.gov. If there are any other glitches/problems, panel members should inform TAP Analysts.
- The TBR IRM was posted the IRS web site. The updates were centered on the organizational structure. Tuzynski also mentioned that some essentials that employees should consider with regard to TBR guiding principles were listed in the IRM as well.
- Tuzynski mentioned that unfortunately, the TBR cannot participate in the nationwide forum due to travel restraints and other restrictions. TBR had hoped to have a table with a suggestion box and a survey of preferences to get feed back from the public.
- TBR is still working on getting the word out through her staff, and is putting issues on “Issue Management Resolution “database.

### **SA Analyst Report**

#### **Blair stated thee following:**

- Her office is dealing with new releases on Return Processing problems, transcripts requests, E-file and Returns Delays problems.
- Education and Adoption credits – there is pending legislation that may renew or extend the credit permanently. If this is not done, the credits will expire at the end of 2012.
- ID theft Problems and Exemption Organization problems are other issues that are coming in.

### **Subcommittee Report Out**

#### **Technology & Processes Improvement**

Flanders stated that he had a subcommittee call in May; their goal was outlined to get the first submission by June. This will not be done in the time frame originally planned, but will be done in time for July.

Williams reported that Rodriguez and Pinilis worked on coming up with questions for a survey for those preparers that are involved in the audit process, nothing has been finalized.



Williams is working on coming up with ways to rate work issues. She has reached out to CPAs to talk about different ways- how they work on intrinsic values and how to incorporate in a rating process deciding priorities.

George mentioned that the survey is in good shape with respect to the content. He stated that he has started reaching out to organizations accounting firms, AICPA, to see what input he can receive.

### **Outreach**

Members seemed confused on the frequency of providing outreach and what actually counts for outreach or hours spend on doing TAP business. Odom and Morizio explained what counts for outreach, timely outreach reports each month and what is considered duplication including how the hours are measured.

### **Recruitment**

Odom and Mikhail provided an update to the members on TAP recruitment interviews. There were some good applicants; Mikhail thinks TAP will get some good outreach from some of the applicants that may be selected.

### **Closing**

Seth thanked everyone for joining the call. He noted to members, if they are unable to join the teleconference meeting on July 18 they should notify Morizio and Odom.

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**Taxpayer Advocacy Panel (TAP)**  
**Taxpayer Burden Reduction Project Committee, TBRPC**  
**Face to Face Meeting in Brooklyn, New York**  
**Tuesday, May 1, 2012**  
**8:00 a.m. to 4:30 p.m.**  
**Wednesday, May 2, 2012**  
**8:00 a.m. to 12:00 p.m.**

**Day One – May 1, 2012**

**Program Owners**

- Tuzynski, Laurie – Senior TBR Advisor
- Marsh, Nadine – Tax Analyst

**Designated Federal Official**

- Juncewicz, Tina – Supervisory Associate Advocate

**Committee Members Present**

- Bentley, Susan
- Flanders, Seth Chair
- George, Philip
- Jackson, Diedre
- Kennerty, Michael
- Pinilis, Russell
- Rodriguez, Luis
- Williams, Cindi Vice-Chair

**Committee Members Absent**

- Mikhail, Boris
- Hayes, Herbert

**Taxpayer Advocacy Panel Staff**

- Babb, Rose A. – Management Assistant
- Jenkins, Audrey Y – Program Analyst
- Odom, Meredith – Program Analyst
- Morizio, Louis – Program Manager

**Other Staff – TAS and TBR**

- Kideckel, Susan – Program Analyst, Manhattan TAS
- Teharani, Bernardita – LTA, Brooklyn

**Public Participants**

- None

### **Welcome/Announcements**

Flanders welcomed all to the first TBR Face to Face Project Committee Meeting and opened the floor for self-introductions

### **National Office Report**

Morizio reported that the TAP Recruitment has ended for 2012 applicants. There were 382 completed applications and, 400 in progress. Next week, all TAP Managers and Headquarters Staff will meet in Washington, DC to ranking of those applications. Some members will be asked to lend their support for the interview process. TAP Manager, Analyst, LTA and panel members are part of the interview team. This takes place at the end of May early June. Morizio informed members that as of May 7 the new Acting TAP Director will be Tiffany Todaro, an LTA from Oakland, CA. Todaro will be attending some of the face to face project committee meetings.

Morizio mentioned that he would be having a meeting with Senior Leadership/TAP Leadership to discuss some items that were of concern to the members. Some suggestions were;

- **SATO travel** – High prices for refundable tickets. Morizio explained that there is nothing that we can do about the prices. We are mandated to use Sato which provides us with totally refundable tickets. Annual meeting – they will be virtual meetings. All meeting over \$20,000 has to be approved by Treasury. First three months of the year should be educational, then the committee assignments in April or May. There will be additional training on Tap Space as well as Chair and Vice Chair training.
- **Outreach** – Jackie Rollins, TAP Vice Chair is disappointed with the efforts. She will be contacting members to see how she can help with their outreach activities.
- Should the public be contacted to provide feedback to taxpayers who submitted issues via, self-mailers, SAMS, toll-free lines and website comments? This discussion will be finalized at the Joint Committee face to face meeting in July.

The members provided feedback on those issues to Morizio.

### **DFO Report**

Juncewicz stated that there is only one Local Taxpayer Advocate in the state of North Carolina and she is it. Some of the most frequent problems are stolen identity. It is 15% of their inventory. There are several angles of stolen Identify- Electronic Filing and Paper Returns. For both paper and electronic filing, there needs to be more scrutiny, - proof of identify. Juncewicz explained the process of how the real taxpayer and the fraudulent returns are separated. In cases of multiple years involved, this process becomes more complicated.

### **DFO Report Continued**

There are growing cases for taxpayers using social security numbers of deceased persons in the year the taxpayers have passed. Some of this information was taken off websites - Ancestry.com and Church of Latter Day Saints. There are also cases where there are unscrupulous practitioners who prepare tax returns, do not provide copies to their clients, and alter the returns before submission to the IRS.

Juncewicz also mentioned social security numbers that are used by fraudulent filers of deceased children, and to claim Child Tax Credit. This causes the legitimate parent filing a return to be kicked out the system.

There is an ID Fraud theft unit program set up to monitor these activities.

Regarding levies, taxpayers who are experiencing economic hardship may have their refunds expedited to accommodate their hardships.

### **Program Office Update**

Tuzynski provided an over view of her position and provided handouts from the previous TBR office 2008 Matrix "Cost Benefit Analysis Consideration" that she is redesigning. Tuzynski also mentioned that the IRS Commissioner headed two public forums for practitioners and banking institutions to aid in identifying theft. She also mentioned that the Accounts Assurance Services program is working on targeting those areas of ID Fraud. In addition, IRS is holding on to refunds to verify the authenticity of the taxpayers.

### **Subcommittee Break-Outs**

The two subcommittees (1) Technology Improvement and (2) Processes Improvement broke out for their discussions.

### **Public Participation**

N/A

### **Day One Meeting Wrap Up**

Morizio mentioned:

All Face-to-Face meetings that exceed a budget of over \$20K need approval by the Treasury Department.

- Sato Travel – GSA runs the City Pair program and SATO is the official travel agency for the federal government.
- January through May might be the most feasible time for face to face meetings.

## **Day Two – May 2, 2012**

### **Program Owners**

- Marsh, Nadine – Tax Analyst

### **Designated Federal Official**

- Juncewicz, Tina – Supervisory Associate Advocate

### **Committee Members Present**

- Bentley, Susan
- George, Philip
- Jackson, Diedre
- Kennerty, Michael
- Williams, Cindi Vice-Chair

### **Committee Members Absent**

- Flanders, Seth Chair
- Mikhail, Boris
- Hayes, Herbert
- Rodriguez, Luis
- Pinilis, Russell

### **Taxpayer Advocacy Panel Staff**

- Babb, Rose A. – Management Assistant
- Jenkins, Audrey Y – Program Analyst
- Odom, Meredith – Program Analyst
- Morizio, Louis – Program Manager

### **Other Staff – TAS and TBR**

- Kideckel, Susan – Program Analyst, Manhattan TAS
- Teharani, Bernardita – LTA, Brooklyn

Williams opened the meeting at 8:30 a.m. again, welcoming the members to the second day of the TBR face to face meeting.

### **Manhattan TAS Office Most Problems**

Kideckel introduced herself and provided some background on her office. She provided a hand-out “Manhattan Taxpayer Advocate Service” and discussed some of the following from her handouts:

- Top Ten Issues in TAS
- Offers and Compromises have gone up 37% with some income levels
- Offers in Compromises are under-utilized- the forms are very complicated  
Taxpayers are unable to get certain documents. TAS is trying to simplify the process for the taxpayers

- Preparers can't be found after tax season; and tax refunds are going to preparer accounts
- Major problems with obtaining transcripts from walk-in centers would be helpful
- There are two bilingual case advocates that provide assistance to those taxpayers that need assistance in Spanish

### **Brooklyn TAS Office of Most Serious Problems**

Bernie Teharani, Taxpayer Advocate of New York, introduced herself and discussed the following:

- First Time Home Buyers(FTHBC) has spiked. In addition, to the spike, the FTHBC taxpayers are unable to get the credit due to a line item that was not clear to taxpayers.
- TAS saw a 109 percent increase of Identity theft in 2011.
- Due to under-staffing, the wait can be up to eight months to create ID theft case files.

### **Public Participation**

N/A

### **Meeting Close/Wrap Up**

Juncewicz closed the meeting. The members stated that the face to face meeting was productive. Although they would have preferred to have the annual meeting, a lot of work was done. This meeting will serve as the May meeting. The next meeting will be via teleconference on Wednesday, June 20 at 2:30 p.m. Eastern Standard Time.



**Taxpayer Advocacy Panel (TAP)**  
**Taxpayer Burden Reduction Project Committee, TBRPC**  
**Wednesday, April 18, 2012**  
**2:30 – 3:30 p.m. (EDT)**

**Program Owners**

- Menefee, Tonjua – Senior Tax Analyst, SBSE
- Marsh, Nadine – Analyst, SBSE

**Designated Federal Official**

- Juncewicz, Tina – LTA, North Carolina
- Morizio, Louis – Acting TAP Director

**Committee Members Present**

- George, Philip
- Kennerty, Michael
- Mikhail, Boris
- Williams, Cindi – Vice Chair

**Committee Members Absent**

- Bentley, Susan
- Flanders, Seth – Chair
- Harrison, Diedre
- Hayes, Herbert
- Pinilis, Russell
- Rodriguez, Luis

**Taxpayer Advocacy Panel Staff**

- Gold, Annie – Management Assistant
- Jenkins, Audrey Y – Program Analyst
- Odom, Meredith – Program Analyst
- Gilbert, Susan – Acting TAP Manager East

**TAS Support**

- De Sousa, Brian
- Blair, Judy
- San Juan, Eric

**Public Participants**

- Wells, Tara – Analyst IRS Health Care Implementation Team

**Welcome/Announcements**

Tina Juncewicz opened the meeting since Flanders was having difficulty signing on to the call. The meeting is an Administrative meeting as quorum was not met.

### **DFO Report**

Juncewicz stated that the National Taxpayer Advocate, Nina Olson has been in the news quite a bit lately. You can go on the website to read about her story. Also it is the cover story in the Bloomberg Business week April 16 episode. She talked about things she has on Blog.

### **Program Office Update**

Menefee informed the committee that Turyzec will be discussing the old TBR Matirx and IRM.

### **Subcommittee Report Outs**

Jenkins stated that the subcommittees have met and went over the items they will be working at the May 1-2, 2012 face to face meeting. Hopefully there will be some recommendations written up and ready for approval.

### **Office Report – Recruitment**

Susan Gilbert stated that to date TAP has received 277 completed and 487 incomplete applications. We will be going out to encourage participation on the 27 of April as the application process ends.

### **Face to Face Logistics**

Louis Morizio stated April 30 is the travel day for the TBR Face-to-Face. May 1 will be a full day meeting. The next day, May 2 will be a half day meeting with everyone traveling back home in the afternoon. Everyone should plan on being there until noon. The Holiday Inn Express is located at 279 Butler Street, Brooklyn. The hotel does offer hot and cold breakfast. There is shuttle service to and from the building. They will give each guest a \$20 dollar coupon for dinner at their restaurant. If anyone is interested in going to Manhattan you would take the subway at Fourth Ave. Take the R line to go to Manhattan for shopping or dinner. The meeting will begin promptly at 8:00 a.m. and end at 4:30 p.m. Tuesday, May 1, 2012. Most of the meeting will be a working meeting. There will be a breakout session for the subcommittees. If you need any research prior to the meeting send Meredith Odom and Audrey Jenkins your requests. They will have ample time to get the information to you. The meeting will be held at 625 Fulton Street (10 Metro-Tech). It is between Rockwell and Hudson across the street from McDonalds.

Eric San Juan, TAS Analyst was extended the invitation to attend the Face-to-Face.

Jenkins stated that Issue 23716 will be presented for approval.

### **Public Participation**

Tara Wells stated she was just listening in. Jenkins explained this call is not the typical call. The calls are usually longer, at least an hour. Our June call will be on the third Wednesday, June 20. Wells informed the committee she will be busy on that day delivering.

Nadine and Laurie Tuzynski will be there present at the face to face meeting.





### **Closing**

Cindi Williams said she will catch up to Seth Flanders and fill him in on what was discussed.

The next meeting is scheduled for May 1 – 2, 2012 face to face meeting in Brooklyn, New York.



**Taxpayer Advocacy Panel (TAP)**  
**Taxpayer Burden Reduction Project Committee (TBRPC)**  
**Wednesday, February 15, 2012**  
**2:30 – 3:30 pm (EDT)**

**Program Owners**

- Menefee, Tonjua – Senior Tax Analyst, Small Business Self Employment, SBSE
- Chambers-Brown, Barbara – Technical Advisor, SBSE
- Tuzynski, Laurie – Senior TBR Advisor

**Designated Federal Official**

- Morizio, Louis – TAP Program Manager – Acting DFO

**Committee Members Present**

- Bentley, Susan
- Flanders, Seth
- George, Philip
- Hayes, Herbert
- Kennerty, Michael
- Mikhail, Boris
- Rodriguez, Luis

**Committee Members Absent**

- Harrison, Diedre
- Pinilis, Russell
- Williams, Cindi

**Taxpayer Advocacy Panel Staff**

- Babb, Rose A. – Management Assistant
- Jenkins, Audrey Y. – Program Analyst
- Odom, Meredith – Program Analyst

**Public Participants**

Pierce, Pamela – TAP Alternate

**Welcome/Announcements**

Flanders welcomed all to the first TBR Project Committee Teleconference.

**DFO Report**

Morizio welcomed all and mentioned the following:

National Taxpayer Advocate, Nina E. Olson has released her *Fiscal Year 2012 Objectives Report to Congress*. Olson identified the priority issues that TAS will address during this fiscal year, and expressed particular concern about the impact of IRS budget cuts on taxpayer service and tax compliance.

### **Program Office Update**

Tuzynski welcomed all to the teleconference and mentioned that her office is working on a number of things:

- Spoke to some external groups; National Practitioners Liaison meeting last week.
- Working on a booth for the Nationwide Taxpayer Forum to get the word out on TBR to the public.
- Working on an internal webpage for IRS employees to use as a tool. This tool will be used when employees are considering TBR implementation programs and changes.
- Currently involved in discussions on Affordable Care Act, ACT.
- IRS – Website has a Form 13285A – (TBR Suggestions to help the IRS Identify meaningful Burden Reduction Opportunities)

Action Item: Jenkins will provide the webpage to view Form 13285A via email to members.

### **Subcommittee Report Out (Technology)**

Bentley stated that her subcommittee met three weeks ago, some of their discussions were:

- Flanders gave his vision on how TBR issues will be processed;
- Flanders also discussed the procedures that will be used to elevate the solutions up through TAP and, subsequently to the IRS.
- Issues are being grouped into categories for further work

### **Subcommittee Report Out (Process)**

Rodriguez mentioned that when his subcommittee met earlier this month, they discussed the following:

- The subcommittee is reviewing the open issues report.
- The members agreed to take a look at 1099 issues and information matching.

Flanders mentioned to members that if they have any ideas or thoughts for the subcommittee's assignment, please inform Jenkins.

The new outreach spreadsheet form will have two tabs, one for outreach and the other for outreach hours report. This report will represent all work done for TAP outreach and other forms of TAP member contact with taxpayers.

The hours spent on outreach and other TAP Business will be used to determine which members are eligible for the Presidential Volunteer Service Awards annually. Morizio



mentioned that the spreadsheet will keep a running total throughout the year. Time frames may have to be adjusted if there were outreach events done in December, 2011.

### **Office Report**

Jenkins asked members to take a look at their profile in TAP Space. Members should ensure that they have checked off the appropriate boxes to receive email notifications for their project committee work.

National Taxpayer Advocate, Nina Olson, has a daily blog discussing Taxes and the Taxpayer Advocate Service. Members were encouraged to take a look at the daily blog.

### **Outreach**

Bentley mentioned that she has a food and travel blog and that she added the TAP logo and web link to the blog.

Kennerty mentioned that he has an outreach scheduled at the end of February.

Mikhail mentioned that he discusses TAP with his clients. He also stated that he has received some suggestions with issues his from his clients.

### **Public Participation**

Pierce stated that the meeting was very informative.

### **Miscellaneous**

Returning members were asked to consider volunteering their time to mentor the new members. Some members stated that they will submit their names to Jenkins via email.

Morizio mentioned to avoid a conflict of interest, there must be a separation between TAP and your professional interests.

### **Closing**

Flanders thanked the members for joining the call; he looks forward to having a great year. The next meeting is scheduled for March 21, at 2:30pm EST.



**Taxpayer Advocacy Panel (TAP)**  
**Taxpayer Burden Reduction Project Committee (TBRC)**  
**Wednesday, January 18, 2012**  
**2:30 – 3:30 p.m. (EDT)**

**Program Owners**

- Menefee, Tonjua – Senior Tax Analyst, Small Business Self Employment, SBSE

**Designated Federal Official**

- Juncewicz, Tina, LTA North Carolina

**Committee Members Present**

- Bentley, Susan
- Flanders, Seth, Chair
- George, Philip
- Hayes, Herbert
- Kennerty, Michael
- Mikhail, Boris

**Committee Members Absent**

- Harrison, Diedre
- Pinilis, Russell
- Rodriguez, Luis
- Williams, Cindi, Vice Chair

**Taxpayer Advocacy Panel Staff**

- Babb, Rose A., Management Assistant
- Collins, Shawn, TAP Director
- Jenkins, Audrey Y, Analyst
- Morizio, Louis, TAP Program Manager
- Odom, Meredith, Analyst

**Other Attendees**

- Chambers-Brown, Barbara – CSO-SLHQ Technical Advisor, SBSE
- Gilmore, Lisa – Senior Tax Analyst
- McPhail, Jennifer – Senior Program Manager
- Haskell, Susan – Tax Analyst
- Terri Willert, SA Senior Analyst
- Stephen Halker, LTA New Mexico
- Eric San Juan, TAS Attorney Advisor

**Public Attendees**

None

### **Welcome/Announcements**

Flanders welcomed all to the first TBR Project Committee Teleconference.

### **DFO Report**

Juncewicz stated the following:

National Taxpayer Advocate, Nina E. Olson has released her *Fiscal Year 2012 Objectives Report to Congress*. Olson identified the priority issues that TAS will address during this fiscal year, and expressed particular concern about the impact of IRS budget cuts on taxpayer service, tax compliance, and IRS lien filing practices.

Jenkins stated she provided a link via email to view the NTA, Report to Congress on the IRS/TAS Website.

EITC Awareness Day is January 27. Juncewicz mentioned to the members that this is a good opportunity to coordinate with their Local Taxpayer Advocates, LTA to perform outreach. Jenkins mentioned that Susan Gilbert the TAP Senior Analyst had previously emailed the list to members.

### **Committee Focus**

Flanders stated that both he and Williams had discussions with TBR Program Owners and the TAP staff on the direction of TBR for 2012. A list of issues to be worked along with a pre-read was sent via email to members regarding the direction of the TBR committee.

Flanders informed members that there will now be two Subcommittees – Technology and Process Improvement. Process improvement will cover methods used and the coordination between IRS and other business areas. Technology Improvement will cover ways that technology can be used or improved within the organization.

The following Subcommittees were formed:

#### **Process Improvement**

Rodriguez, (Chair)  
Williams  
Philip

#### **Technology Improvement**

Bentley, (Chair)  
Kennerty  
Mikhail  
Flanders

Jenkins will contact those members that were absent via email to make their selection on which subcommittee they wish to join.

Flanders mentioned to members that if they have any ideas or thoughts for the subcommittee's assignment, please inform Jenkins.

Morizio mentioned to the members that most of the project committee work will be done on a subcommittee level. This includes assignments via email and phone discussions

amongst members. At the full project committee teleconference each month, the sub leads will report out on the status of assignments worked on. Any clarifications that are required by members should be brought up at that time.

### **Office Report**

Morizio informed the members that the face to face meeting for the TBR Project Committee will be held on April 30 through May 2. The travel days are April 30 and May 2. The meeting begins on May 1 all day and May 2 half day meeting. The other half day on May 2 will be travel back to residence. As a reminder, members were asked not to make any travel arrangements outside of TAP; they **will not** be reimbursed if they make their own reservations.

### **Subcommittee meeting dates**

The Technology Subcommittee has agreed to meet on the 4 Thursday of each month at 3:00 pm. The Process Improvement Subcommittee will inform Jenkins of the time and date they plan to meet each month.

### **Closing**

Flanders thanked the members for joining the call; he looks forward to having a great year. The next meeting is scheduled for February 15, 2012, at 2:30pm EST.