

## Meeting Subject:

**Date: August 1, 2006**

**City, State: Albuquerque, New Mexico**

**Time: 8:30 am – 12:00 pm**

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## Attendees: Name, Title & Organization

- Larry Hess, NM Society of CPA's
  - Billie J. Thompson, NM Society of CPA's
  - Katherine M. Rowe, NM Society of CPA's
  - Anita Lovato, NM Society of Enrolled Agents
  - Nancy Duben, New Mexico NATP
  - Barbara Sawyer, APA Albuquerque
  - Gail Martinez, APA Albuquerque
  - Sherri Reading, Taxpayer Advocacy Panel
  - Willis Carter, NM Society of Public Accountants
  - Mae S. Yee, NM Society of Public Accountants
  - Robert Pasquale, NM Society of CPA's
  - Linda Martinez, Local Taxpayer Advocate, Albuquerque
  - Monica Orona, IRS GL
  - Steven Phillips, IRS SL
  - Gene Moren, IRS SL
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## Meeting Summary

**Guest Speaker 1** – Steven Phillips, Stakeholder Liaison opened the meeting and discussed priority issues for the upcoming year, Forms 944, Electronic Catalog and Online Payment Agreement Application. Larry Hess wants to be kept up-to-date on the online payment process and needs the date that it will be fully launched and any new developments.

**Guest Speaker 2** – Linda Martinez, Local Taxpayer Advocate discussed an open IMRS issue involving extensions not being stamped when they were received in Fresno. She advised the attendees that the problem has been resolved and if a practitioner has any problem they can self-identify and have penalties removed.

**Guest Speaker 3** - Gene Moren, Stakeholder Liaison discussed changes to the OIC program based on TIPRA. Discussed the 20% down payment, first installment with deferred payment offers, two-year timeframe and processability issues.

**Guest Speaker 4** - Larry Hess, New Mexico Society of CPA's discussed Headliner 163 – Health Insurance Covering S Corporation Shareholders. Larry stated that the headliner is worded wrong and conveys incorrect information. He discussed how members of a S-Corp should be treated and wants further clarification on the headliner. He also would like some type of disclaimer on the as to the legal authority, if any, of an IRS Headliner.

**Guest Speaker 5** – Monica Orona, Governmental Liaison discussed the function of GL and specifically how she can assist the practitioners.

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## **Issues & Status**

**Issue** – Form 8655 – Gail Martinez stated that there have been problems with the cal site recognizing her 8655. She stated that every time she calls, the Service will not discuss account information without a 2848. The practitioner hotline has not been any help in resolving the issue.

**Issue** – Cannot talk to anyone in the Entity Section of the Campus, (W&I). Items are faxed in but no response is ever received and the Toll-free Number and the Practitioner Hotline says that they cannot transfer calls to the Entity Section. Form says that a response will be received in 60 days, but there is no response and there is no way to follow up. They will not return phone calls when a request for a phone call is faxed in.

**Issue Status Report** – Linda Martinez, TAS – Problem with Fresno SC extensions ha been resolved.

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## **Roundtable & Comments**

Gail Martinez - Filing 941 and 940 electronically requires a third-party transmitter. Practitioners want a way to file the forms themselves without having to go through a third-party.

Gail Martinez – Overall it seems that people answering calls at the IRS are rude and not helpful. She has had instances where they have refused to give their name and ID number a second time and refused to allow her to speak to a supervisor. ACS is not recording information given during the phone calls and often they have to go back over issues they have discussed before. Several other practitioners agreed that they have had the same problems.

Anita Lovato – How does IRS pick up the checkbox that authorizes the return preparer to discuss the return. She has had several instances where the Campus will not discuss the return with her without a POA – even during the initial processing phase.

Katherine Rowe – Different processes for each type of tax (1120, 1065) and/or form (1099, W-2) is creating extra burden on the practitioners.

Willis Carter – Would like more information on tip reporting specifically the Attributed Tip Income Program (ATIP).

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**Next Scheduled Meeting**

November 14, 2006