

Ring's Reflections

by Bob Ring

Taxpayer Advocate Saves the Day

How can poor penmanship get you into trouble with the Internal Revenue Service (IRS)? Let me tell you about my seven-month struggle to get my 2011 federal tax return accepted.

First of all, I do have lousy penmanship; I admit it. I remember my sixth grade teacher showing a sample of my writing to the class and remarking that it looked pretty good, if you held the paper up to the light and looked at the writing from the back side.

But this story begins 60 years later on March 12, 2012 when I mailed in my 2011 federal income tax return, filled out in my own hand. I was a month ahead of the April 15th deadline, but I was expecting a sizeable refund, and didn't want to dally.

The first indication of trouble was a letter from the IRS dated April 20th saying that they had received my return, but that they "need more information to process the return accurately," and would I please call them. My personal identification data on the letter was all correct, **except** that my social security number (SSN) was wrong. One digit, a "3," had been incorrectly recorded as an "8." Oh! Oh!

When I finally reached the IRS by telephone on May 21st, having had calls dropped twice and overwhelmed with busy lines, I answered a whole bunch of questions confirming my identity and my tax return data, and told them that they had gotten my SSN wrong, probably an error in entering my return into the IRS computer system. They seemed to accept this, but said they'd need another 4-6 weeks to complete processing my return. Oh my!

Hearing nothing, I again called the IRS on July 24th to find that they had no record of my return under my correct SSN. They suggested that I resubmit the return and they would need another 4-6 weeks to complete processing. Oh s___!

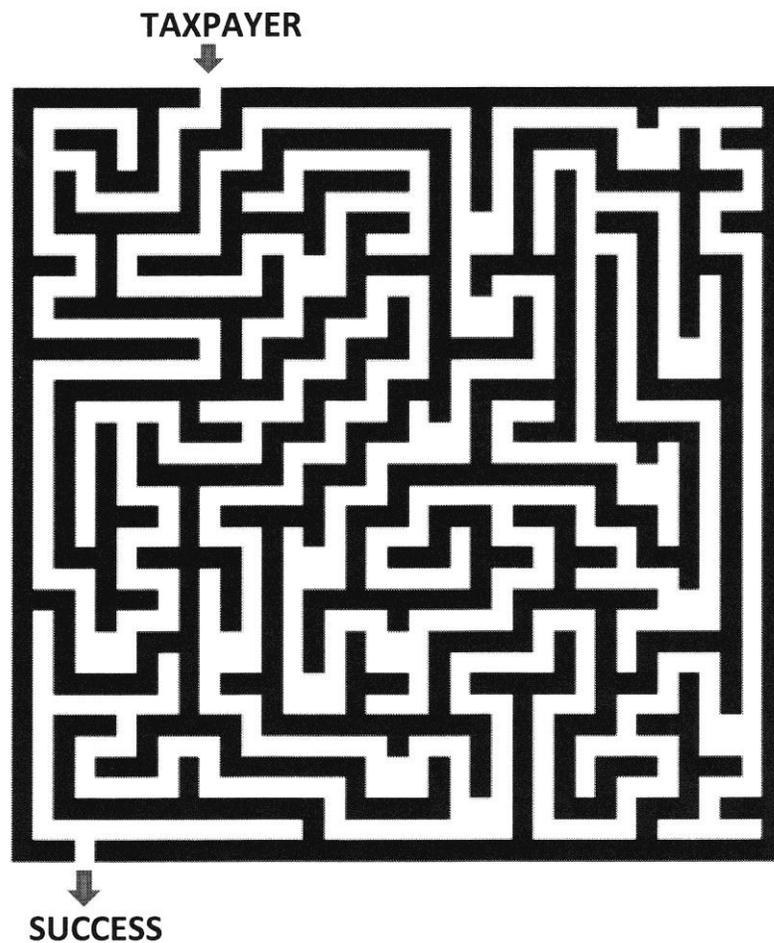
At this point, with me climbing the walls, Pat made a suggestion that changed the ballgame. She wondered if I could find an "advocate" to straighten out this mess.

I discovered that the IRS has a little-known division called the Taxpayer Advocate Service that helps taxpayers solve problems. On July 30th, I successfully passed a screening telephone conversation and by August 2 was hooked up with my advocate to whom I explained my problem for the "umpteenth" time and who agreed to take my case. Her first request was for me to resubmit my return. Oh wonderment!

Just as my advocate was getting started on my problem, I received a letter from the IRS telling me that I owed them almost \$10,000 (based on the incorrect SSN) that must be paid within three weeks "to avoid additional penalty." Oh incredulous!

But my advocate was now on the case and in a timely manner (for the IRS) was able to resolve my issues. On September 5, I received a check for my complete refund, and (with prompting from me) on October 10th, another check for interest on the refund. Oh boy!

On October 13th, I received a “close-out” letter from my taxpayer advocate that speculated that a transcribing error was probably made by a busy tax-season temporary employee and suggested that I might consider filing an electronic return next year. Oh really?



*It took seven months for columnist Bob Ring to get his 2011 federal tax return accepted.
(Courtesy of Bob Ring)*