

Global Information Access, Local Information Management

# The Story of IRS Tax Map

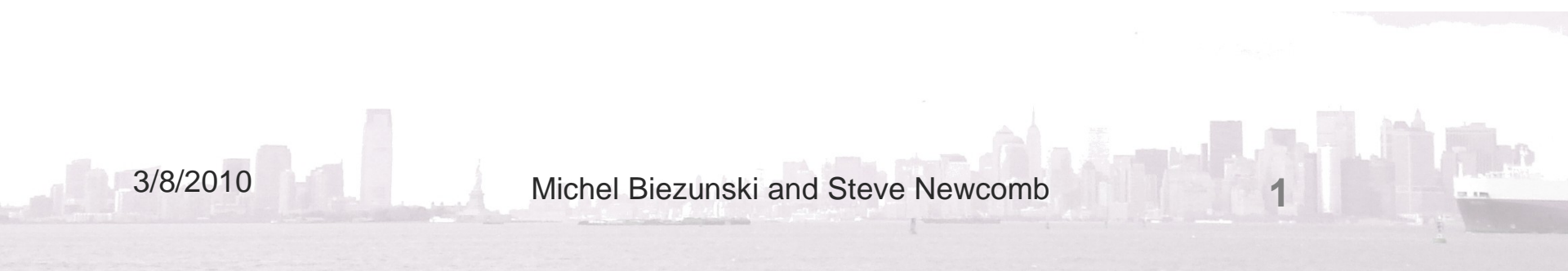
Michel Biezunski

Infoloom

Steve Newcomb

Coolheads Consulting

March 8, 2010  
XML SIG New York  
Morgan Stanley



# Outline

- why Tax Map started
- a Tax Map tour
- bottom-up
- symbols versus meanings
- Tax Map's process
- a topic map
- auditing Tax Map
- lessons learned

# Why Tax Map Started

- IRS responding to criticism:
  - Information delivered to taxpayers lacked accuracy.
  - Telephone assistors had a hard time finding what was needed.

# IRS Tax Map

Updated March 2, 2010

Public version:

<http://taxmap.ntis.gov>

Search All Topics:

  
GO

[Search Help](#)  
[Navigation Help](#)

## Main Topics

A B C D E F G H I  
J K L M N O P Q R  
S T U V W X Y Z #

[FAQs](#)  
[Forms](#)  
[Publications](#)  
[Tax Topics](#)

[Comments](#)  
[About Tax Map](#)

Use the Navigation Bar on the left to:



## Search Tax Map By Topic

**Search All Topics** - Search all 5000 topics in Tax Map. Using as few words as possible, type in the word(s) that represent the topic you are looking for

**Main Topics** - Select a letter and browse through a list of frequently used topics (approximately 400) to start your search



## Browse Tax Map Products

**Frequently Asked Questions** - Browse a list of tax law frequently asked questions arranged by category and subcategory

**Forms and Publications** - Browse a list of Tax Forms and Publications

**Tax Topics** - Browse more than 150 topics written for Tele-Tax Topics, the IRS telephone response system



# Compensation, Wage, Salary

[Compensation](#)[Salary](#)[Wage](#)

Search All Topics:

GO

[Search Help](#)[Navigation Help](#)

## Main Topics

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#)[J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#)[S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) <#>[FAQs](#)[Forms](#)[Publications](#)[Tax Topics](#)[Comments](#)[About Tax Map](#)[Forms](#) [Publications](#) [FAQs](#) [TeleTax](#)

## Forms and Instructions

### Form **W-2** Wage and Tax Statement (Info Copy Only)

[MORE](#)

*W-2 Instructions for Forms W-2 and W-3,  
Wage and Tax Statement and Transmittal  
of Wage and Tax Statements*

### Form **W-2AS** American Samoa Wage and Tax Statement (Info Copy Only)

[MORE](#)

### Form **W-2C** Corrected Wage and Tax Statement (Info Copy Only)

[MORE](#)

*W-2C Instructions for Forms W-2c and  
W-3c, Corrected Wage and Tax Statement  
and Transmittal of Corrected Wage and  
Tax Statements*

### Form **W-2GU** Guam Wage and Tax Statement (Info Copy Only)

[MORE](#)

## Related Topic Links

- [2. Special Wage Payments](#)
- [501\(c\)\(27\) - State-Sponsored Workers' Compensation Reinsurance Organizations](#)
- [Adjustment, Withholding](#)
- [Advance commissions and other earnings.](#)
- [Back pay awards.](#)
- [Bonuses and awards.](#)
- [Child's wages used for own support](#)
- [Compensation for Labor or Personal Services](#)
- [Cumulative Wage Method](#)
- [Deferred Compensation Plan](#)
- [Differential wage payments.](#)
- [Earned Income](#)

## Publications

---

### Related Publications

---

**Publication 15** Circular E, Employer's Tax Guide

[INDEX](#)[PDF](#)[MORE](#)

---

**Publication 15-A** Employer's Supplemental Tax Guide (Supplement to Circular E, Employer's Tax Guide, Publication 15)

[INDEX](#)[PDF](#)[MORE](#)

---

**Publication 15-B** Employer's Tax Guide to Fringe Benefits

[INDEX](#)[PDF](#)[MORE](#)

---

**Publication 15-T** New Wage Withholding and Advanced Earned Income Credit Payment Tables (for wages paid through December 2009)

[PDF](#)[MORE](#)

---

**Publication 505** Tax Withholding and Estimated Tax

[INDEX](#)[PDF](#)[MORE](#)

---

**Publication 507** Business and Personal Expenditures

[PDF](#)[MORE](#)

## Links Inside Publications

### **Publication 15 - Circular E, Employer's Tax Guide - 5.**

#### **Wages and Other Compensation**

5. Wages and Other Compensation. Wages subject to federal employment taxes generally include all pay you give...

### **Publication 15-A - Employer's Supplemental Tax Guide**

#### **(Supplement to Circular E, Employer's Tax Guide, Publication 15) - 5. Wages and Other Compensation**

5. Wages and Other Compensation. Publication 15 (Circular E) provides a general discussion of taxable wages....

### **Publication 17 - Your Federal Income Tax (For Individuals)**

#### **- Tax Withholding and Estimated Tax**

Salaries and Wages. Income tax is withheld from the pay of most employees. Your pay includes your regular...

## ■ Frequently Asked Questions

---

### **FAQ - Interest/Dividends/Other Types of Income > Ministers' Compensation & Housing Allowance**

A minister receives a salary plus a housing allowance. Is the housing allowance income? Where does the minister...

### **FAQ - Small Business/Self-Employed/Other Business > Entities: Sole Proprietor, Partnership, Limited Liability Company/Partnership (LLC/LLP), Corporation, Subchapter S Corporation**

Are partners considered employees of a partnership or are they self-employed? Partners of a partnership are...

## ■ TeleTax

---

### **TeleTax 401**

Wages and Salaries. 401Wages, salaries, and tips received by an employee for performing services for an employer...



# Compensation, Wage, Salary

[Compensation](#)[Salary](#)[Wage](#)

Search All Topics:

GO

[Search Help](#)[Navigation Help](#)

## Main Topics

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#)[J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#)[S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) <#>[FAQs](#)[Forms](#)[Publications](#)[Tax Topics](#)[Comments](#)[About Tax Map](#)[Forms](#) [Publications](#) [FAQs](#) [TeleTax](#)

## Forms and Instructions

### Form W-2 Wage and Tax Statement (Info Copy Only)

[MORE](#)

*W-2 Instructions for Forms W-2 and W-3,  
Wage and Tax Statement and Transmittal  
of Wage and Tax Statements*

### Form W-2AS American Samoa Wage and Tax Statement (Info Copy Only)

[MORE](#)

### Form W-2C Corrected Wage and Tax Statement (Info Copy Only)

[MORE](#)

*W-2C Instructions for Forms W-2c and  
W-3c, Corrected Wage and Tax Statement  
and Transmittal of Corrected Wage and  
Tax Statements*

### Form W-2GU Guam Wage and Tax Statement (Info Copy Only)

[MORE](#)

## Related Topic Links

- [2. Special Wage Payments](#)
- [501\(c\)\(27\) - State-Sponsored Workers' Compensation Reinsurance Organizations](#)
- [Adjustment, Withholding](#)
- [Advance commissions and other earnings.](#)
- [Back pay awards.](#)
- [Bonuses and awards.](#)
- [Child's wages used for own support](#)
- [Compensation for Labor or Personal Services](#)
- [Cumulative Wage Method](#)
- [Deferred Compensation Plan](#)
- [Differential wage payments.](#)
- [Earned Income](#)

# Form W-2--Wage and Tax Statement (Info Copy Only)

[Forms](#) [Publications](#) [FAQs](#)

## [Forms and Instructions](#)

### Form W-2 Wage and Tax Statement (Info Copy Only)

*W-2 Instructions for Forms W-2 and W-3,  
Wage and Tax Statement and Transmittal  
of Wage and Tax Statements*

### Related Forms

**Form W-2AS** American Samoa Wage and Tax  
Statement (Info Copy Only)

[more](#)

**Form W-2C** Corrected Wage and Tax Statement (Info  
Copy Only)

[more](#)

*W-2C Instructions for Forms W-2c and  
W-3c, Corrected Wage and Tax Statement  
and Transmittal of Corrected Wage and  
Tax Statements*

**Form W-2GU** Guam Wage and Tax Statement (Info  
Copy Only)

[more](#)

## Related Topic Links

- Compensation, Wage, Salary
- Form W-2 From Church
- Form W-2 From College
- Form W-2 Wage Reporting
- Form W-2.
- Forms W-2 and W-2G.
- Information Returns
- Reporting SEP Contributions on Form W-2
- Substitute Forms
- Withholding

Search All Topics:

GO

[Search Help](#)  
[Navigation Help](#)

### Main Topics

A B C D E F G H I  
J K L M N O P Q R  
S T U V W X Y Z #

[FAQs](#)

[Forms](#)

[Publications](#)

[Tax Topics](#)

[Comments  
About Tax Map](#)



## ■ Publications

---

### Links Inside Publications

#### **Publication 17 - Your Federal Income Tax (For Individuals) - Credit for Withholding and Estimated Tax for 2009**

Form W-2. Your employer is required to provide or send Form W-2 to you no later than February 1, 2010. You...

#### **Publication 505 - Tax Withholding and Estimated Tax - Credit for Withholding and Estimated Tax for 2009**

Form W-2. Your employer is required to provide or send Form W-2 to you no later than February 1, 2010. You...

## ■ Frequently Asked Questions

---

#### **FAQ - IRS Procedures > W-2 - Additional, Incorrect, Lost, Non-receipt, Omitted**

May an employer provide me my Form W-2 electronically? Yes, an employer may furnish your (PDF) electronically...

#### **FAQ - IRS Procedures > W-2 - Additional, Incorrect, Lost, Non-receipt, Omitted**

I received an incorrect W-2 form. I can't get my former employer to issue a corrected W-2? What should I do?...

## Links Inside Publications

### **Publication 15 - Circular E, Employer's Tax Guide - 5. Wages and Other Compensation**

5. Wages and Other Compensation. Wages subject to federal employment taxes generally include all pay you give...

### **Publication 15-A - Employer's Supplemental Tax Guide (Supplement to Circular E, Employer's Tax Guide, Publication 15) - 5. Wages and Other Compensation**

5. Wages and Other Compensation. Publication 15 (Circular E) provides a general discussion of taxable wages....

### **Publication 17 - Your Federal Income Tax (For Individuals) - Tax Withholding and Estimated Tax**

Salaries and Wages. Income tax is withheld from the pay of most employees. Your pay includes your regular...



Search All Topics:

GO

[Search Help](#)  
[Navigation Help](#)**Main Topics**[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#)  
[J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#)  
[S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) <#>[FAQs](#)  
[Forms](#)  
[Publications](#)  
[Tax Topics](#)[Comments](#)  
[About Tax Map](#)[< Compensation, Wage, Salary >](#)

## 5. Wages and Other Compensation (p10)

Wages subject to federal employment taxes generally include all pay you give to an employee for services performed. The pay may be in cash or in other forms. It includes salaries, vacation allowances, bonuses, commissions, and fringe benefits. It does not matter how you measure or make the payments. Amounts an employer pays as a bonus for signing or ratifying a contract in connection with the establishment of an employer-employee relationship and an amount paid to an employee for cancellation of an employment contract and relinquishment of contract rights are wages subject to social security, Medicare, and federal unemployment taxes and income tax withholding. Also, compensation paid to a former employee for services performed while still employed is wages subject to employment taxes.

### More information. (p11)

See [section 6](#) for a discussion of tips and [section 7](#) for a discussion of supplemental wages. Also, see [section 15](#) for exceptions to the general rules for wages. Publication



Search All Topics:

[Search Help](#)  
[Navigation Help](#)

**Main Topics**  
[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#)  
[J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#)  
[S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) <#>

[FAQs](#)  
[Forms](#)  
[Publications](#)  
[Tax Topics](#)

[Comments](#)  
[About Tax Map](#)

[< Compensation, Wage, Salary >](#)

## Chapter 5

# Wages, Salaries, and Other Earnings (p47)

## What's New (p47)

### Differential wage payments. (p47)

Payments made by an employer to an individual for any period during which the individual is an active duty member of the uniformed services are treated as wages. See the discussion under *Miscellaneous Compensation*.

### Bicycle commuters. (p47)

The qualified employer transportation fringe benefit is expanded to include any qualified bicycle commuting reimbursement. See *Transportation* under *Fringe Benefits*.





## TAX PRODUCTS

IRS TAX MAP 2009

Search All Topics:

GO

[Search Help](#)  
[Navigation Help](#)

## Main Topics

A B C D E F G H I  
J K L M N O P Q R  
S T U V W X Y Z #[FAQs](#)[Forms](#)[Publications](#)[Tax Topics](#)[Comments](#)  
[About Tax Map](#)< [Previous Page: Types of Income](#)> [Next Page: Interest Received](#)

Use &lt; &gt; to find additional instances of index items.

Rev. date: 11/2005

< [Compensation, Wage, Salary](#) >

# Wages and Salaries

## Tele-Tax Topic 401

Wages, salaries, and tips received by an employee for performing services for an employer must be included in your gross income. Amounts withheld for taxes, including but not limited to income tax, social security and Medicare taxes are considered "received" and must be included in gross income in the year they are withheld. Generally, your employer's contribution to a qualified pension plan for you is not included in gross income at the time it is contributed. However, amounts withheld under certain salary reduction agreements with your employer may have to be included in gross income in the year they are withheld. See Publication 17, Chapter 5, *Wages Salaries and Other Earnings*, and Chapter 6, *Tip Income*, for specific information.

Your employer should provide a [Form W-2](#) showing your total income and withholding. You

# Compensation, Wage, Salary

[Compensation](#)[Salary](#)[Wage](#)

Search All Topics:

GO

[Search Help](#)[Navigation Help](#)

## Main Topics

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#)[J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#)[S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) <#>[FAQs](#)[Forms](#)[Publications](#)[Tax Topics](#)[Comments](#)[About Tax Map](#)[Forms](#) [Publications](#) [FAQs](#) [TeleTax](#)

## Forms and Instructions

### Form **W-2** Wage and Tax Statement (Info Copy Only)

[more](#)

*W-2 Instructions for Forms W-2 and W-3,  
Wage and Tax Statement and Transmittal  
of Wage and Tax Statements*

### Form **W-2AS** American Samoa Wage and Tax Statement (Info Copy Only)

[more](#)

### Form **W-2C** Corrected Wage and Tax Statement (Info Copy Only)

[more](#)

*W-2C Instructions for Forms W-2c and  
W-3c, Corrected Wage and Tax Statement  
and Transmittal of Corrected Wage and  
Tax Statements*

### Form **W-2GU** Guam Wage and Tax Statement (Info Copy Only)

[more](#)

## Related Topic Links

- [2. Special Wage Payments](#)
- [501\(c\)\(27\) - State-Sponsored Workers' Compensation Reinsurance Organizations](#)
- [Adjustment, Withholding](#)
- [Advance commissions and other earnings.](#)
- [Back pay awards.](#)
- [Bonuses and awards.](#)
- [Child's wages used for own support](#)
- [Compensation for Labor or Personal Services](#)
- [Cumulative Wage Method](#)
- [Deferred Compensation Plan](#)
- [Differential wage payments.](#)
- [Earned Income](#)





in All Topics:

GO

[Search Help](#)  
[Navigation Help](#)

#### Main Topics

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#)  
[J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#)  
[S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) <#>

[FAQs](#)  
[Forms](#)  
[Publications](#)  
[Tax Topics](#)

## Back pay awards.

☐ [Publications](#)

### ☐ [Publications](#)

#### [Links Inside Publications](#)

#### **Publication 17 - Your Federal Income Tax (For Individuals)** **- Wages, Salaries, and Other Earnings**

Back pay awards. Include in income amounts you are awarded in a settlement or judgment for back pay. These...

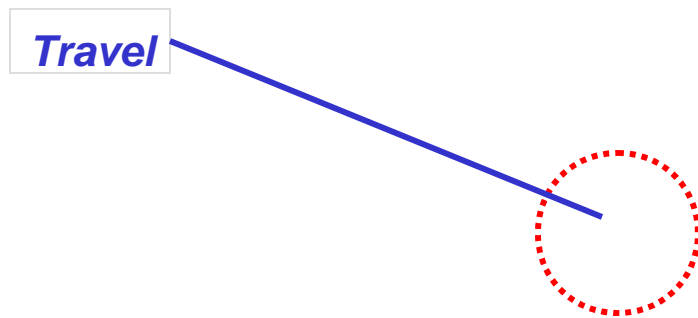
### [Related Topic Links](#)

- [Back Pay](#)
- [Compensation, Wage, Salary](#)

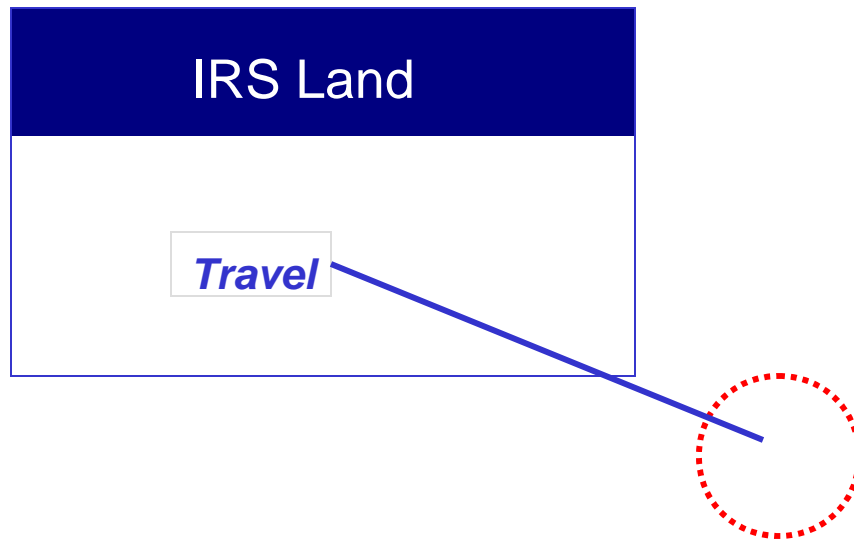
# No workflow change

- IRS didn't want to change anything in their production processes.
- Using Topic Maps would not require changing anything.
- So let's see why...

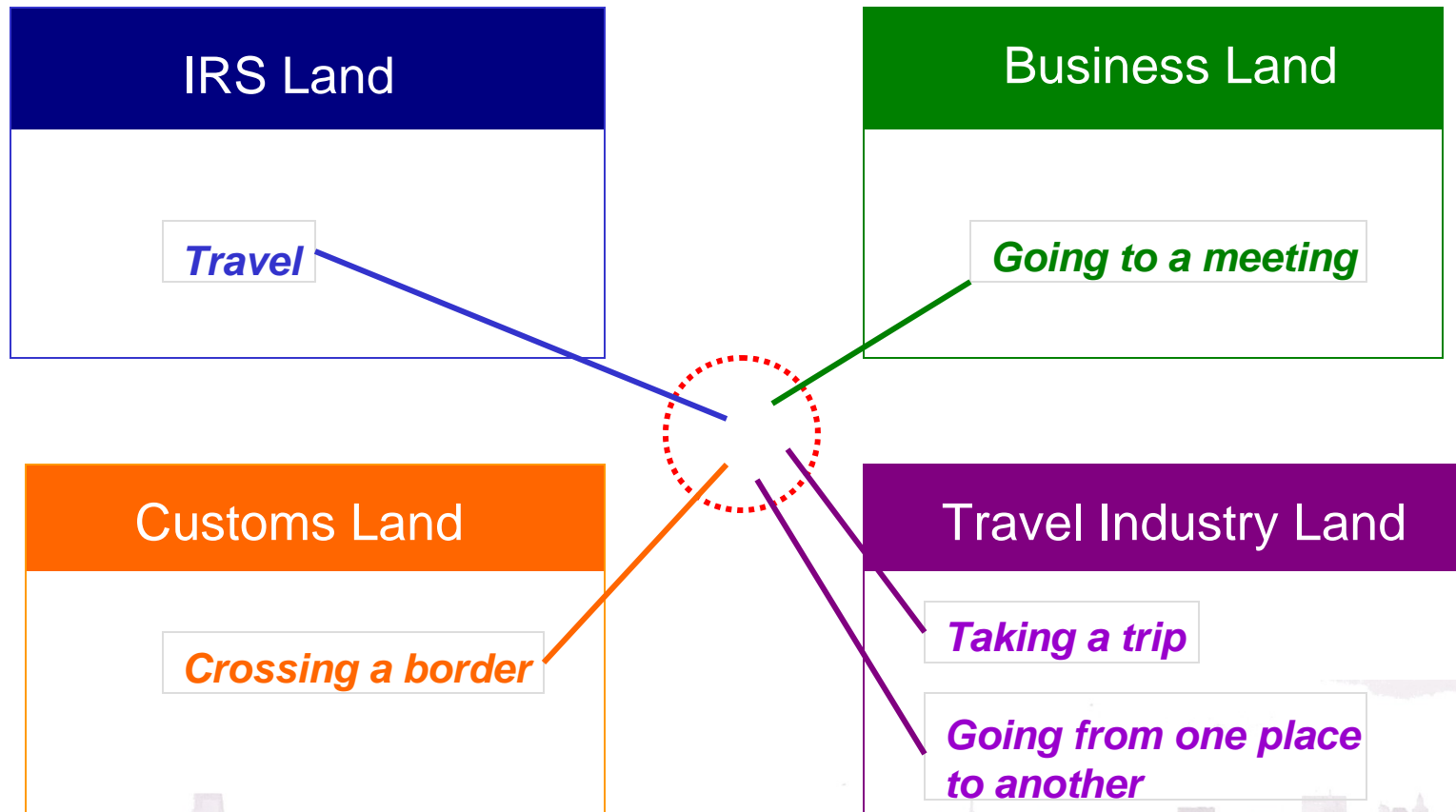
# 1 term, 1 subject



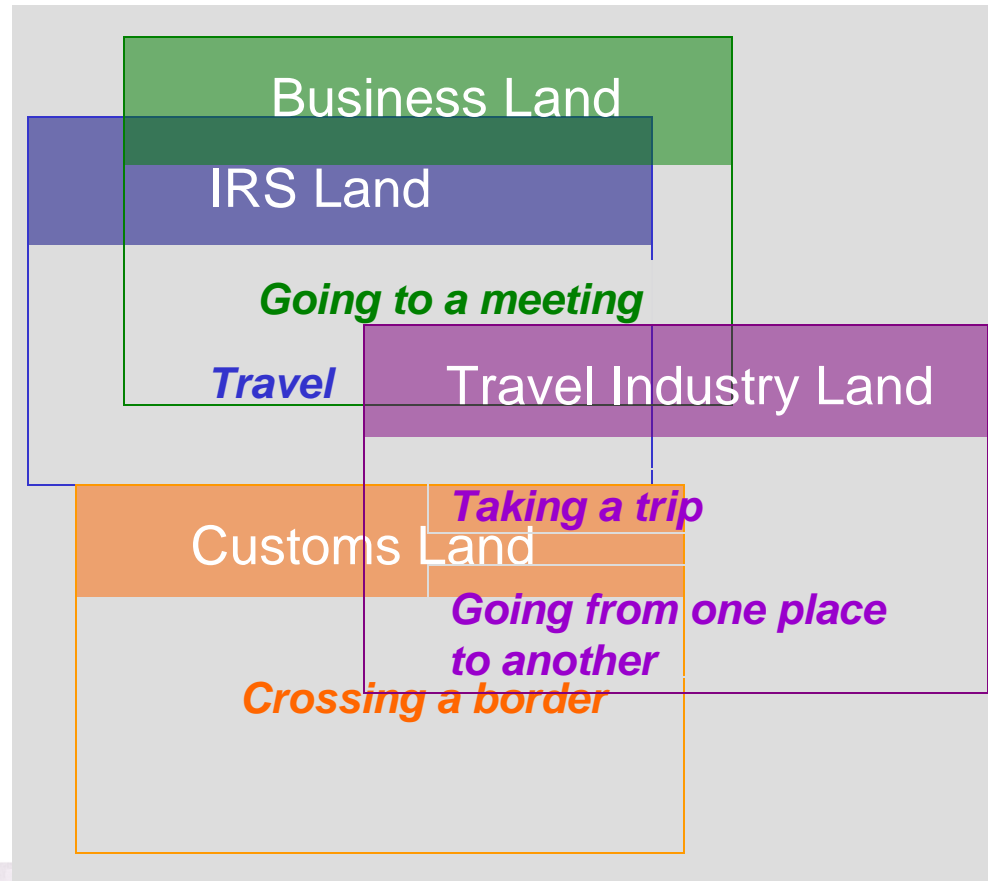
# 1 world, 1 term, 1 subject



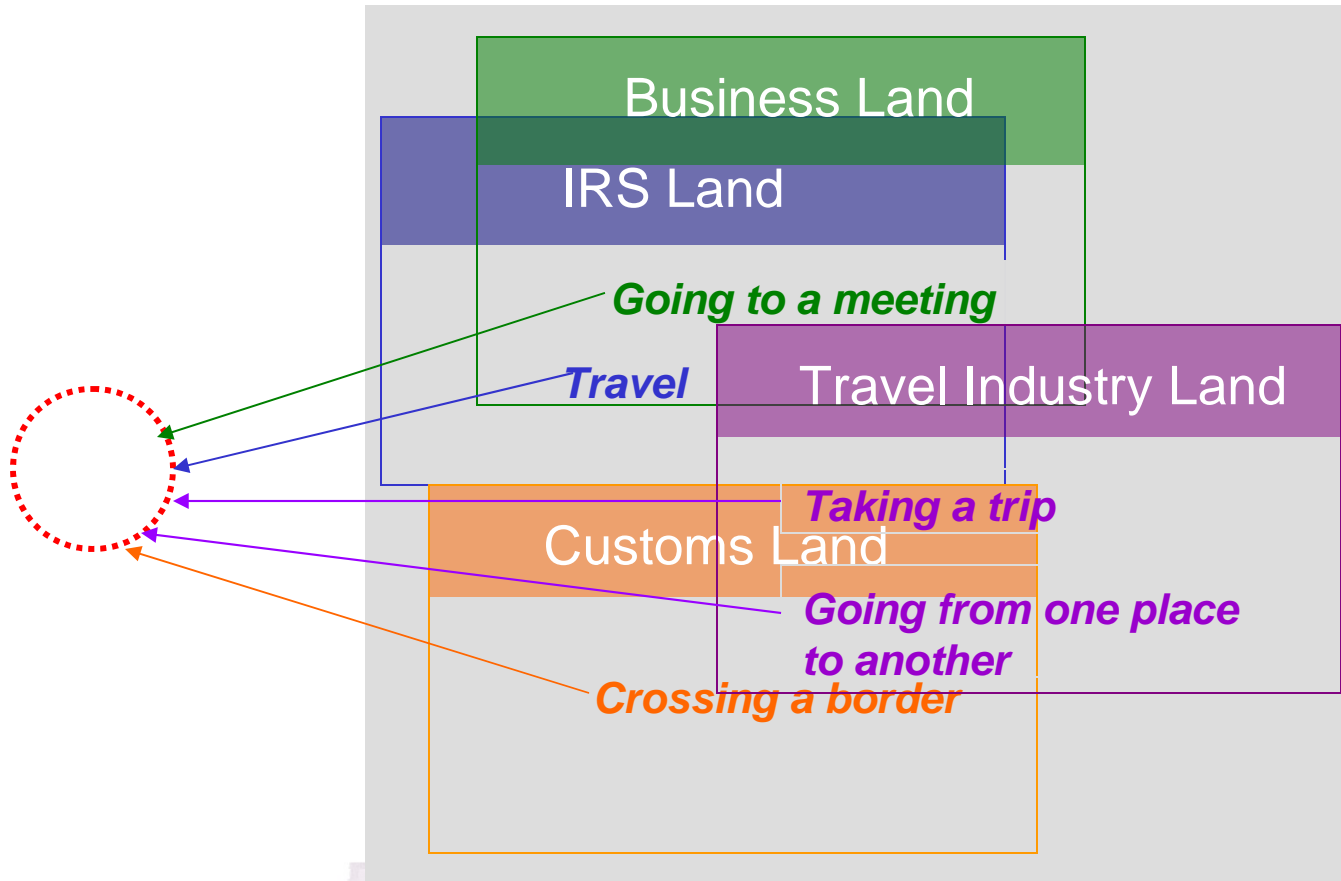
# 4 worlds, 5 terms, 1 subject



# 1 topic



# Every topic has 1 subject



# 3 Strategies

Full text Searching	Colocation by subject	Artificial Intelligence
You need to know the vocabulary... And be lucky	Able to exploit the common sense and multiple community memberships of others	One world. Machine inferencing.

\$0

\$\$\$



# Tax Map's Process

## Editorial Product:

- Ingest the source materials emanating from diverse communities.
- Integrate the knowledge about each subject.
- Make renderings customized for various audiences.

# Tax Map Rules Processing

- Containment
- Three words in common
- Patterns in topic names (e.g. “step x”)
- Plural and singular nouns

# Input of Tax Experts

- Annual workshops
- Handling new topic names
- Tweaking the results of Tax Map processing

# Tax Map as a Topic Map

- XTM model served to design the initial model: Topics, Occurrences, Associations
- In Tax Map, some occurrences also are topics: publications, forms.
- Presentation blurs distinction between occurrences and associations.

# Tax Map Auditing

- All processes acting on all topic names are recorded,
  - including the names that are deleted, renamed, synonymized, or recognized as related to others.
- Based on the “Data Projection Model”
  - inspired by RDF (triples)
  - general “Semantic Microscope”
  - considers topic names as “accounts”

# Compensation

Index

TaxMap

1	<u>alternate name PFT</u>	<u>Compensation, Wage, Salary</u>	>
2	<u>privileged name is</u>	<u>Compensation, Wage, Salary</u>	>
3	< <u>What Is Compensation?</u>		
4	<u>replaced PFT by</u>		
	<u>disrelated:Comma-Other</u>	<u>Allowance, Differential, and Other Special</u>	
	<u>Topic-0 occ</u>	<u>Pay</u>	>
5	<u>disrelated:Comma-Other</u>	<u>Compensation, Miscellaneous</u>	>
	<u>Topic-0 occ</u>		
6	<u>disrelated:Comma-Other</u>	<u>Includible Compensation, Change</u>	>
	<u>Topic-0 occ</u>		
7	<u>disrelated:Comma-Other</u>	<u>Pay, Kinds</u>	>
	<u>Topic-0 occ</u>		
8	<u>disrelated:Comma-Other</u>	<u>Wage Paid, Graduated Withholding</u>	>
	<u>Topic-0 occ</u>		
9	<u>disrelated:Comma-Other</u>	<u>Wage, Pension, or Annuity</u>	>
	<u>Topic-0 occ</u>		
10	<u>disrelated:Comma-Other</u>	<u>Wage, Supplemental</u>	>
	<u>Topic-0 occ</u>		



 Compensation		
11	<u>disrelated.Comma-Other</u> <u>Topic-0 occ</u>	<u>Withholding, Wage</u>
12 < <u>501(c)(27) - State-Sponsored Workers' Compensation Reinsurance Organizations</u>	<u>related by containment</u>	
13 < <u>Compensation for Labor or Personal Services</u>	<u>related by containment</u>	
14 < <u>Compensation for Services</u>	<u>related by containment</u>	
15 < <u>Compensation Information</u>	<u>related by containment</u>	
16 < <u>Compensation, Miscellaneous</u>	<u>related by containment</u>	
17 < <u>Compensation, Wage, Salary</u>	<u>related by containment</u>	
18 < <u>Deferred Compensation Plan</u>	<u>related by containment</u>	
19 < <u>Determining the Source of Compensation for Labor or Personal Services</u>	<u>related by containment</u>	
20 < <u>Employee Compensation Record</u>	<u>related by containment</u>	
21 < <u>Employee Compensation Exemption From Withholding on</u>	<u>related by containment</u>	
22 < <u>Compensation for Independent (and Certain Dependent) Personal Services of a</u>	<u>related by containment</u>	

Compensation		
	<u>Most Recent Year of Service</u>	
25 <	<u>Includible Compensation for Your Most Recent Year of Service</u>	<u>related by containment</u>
26 <	<u>Includible Compensation, Change</u>	<u>related by containment</u>
27 <	<u>Includible Compensation</u>	<u>related by containment</u>
28 <	<u>Nonemployee Compensation</u>	<u>related by containment</u>
29 <	<u>Nonqualified Deferred Compensation and Section 457 Plans</u>	<u>related by containment</u>
30 <	<u>Nonqualified deferred compensation plans.</u>	<u>related by containment</u>
31 <	<u>Not Compensation</u>	<u>related by containment</u>
32 <	<u>Other compensation.</u>	<u>related by containment</u>
33 <	<u>Section 457 Deferred Compensation Plans</u>	<u>related by containment</u>
34 <	<u>September 11th Victim Compensation Fund of 2001</u>	<u>related by containment</u>
35 <	<u>Unemployment Compensation</u>	<u>related by containment</u>
36 <	<u>What Is Compensation?</u>	<u>related by containment</u>
37 <	<u>What Is Not Compensation?</u>	<u>related by containment</u>
38 <	<u>Withholding From Compensation</u>	<u>related by containment</u>
39 <	<u>Workers' Compensation</u>	<u>related by containment</u>
40 <	<u>Workmans' Compensation</u>	<u>related by containment</u>
41 <	<u>Reemployment After Retirement</u>	<u>related PFT</u>
42	<u>normalizes as</u>	<u>COMPENSATION</u> >
43	<u>URL</u>	<u>ts0/compensationwagesa o 43762ca6.htm</u> >



## Deleted Topic Names

266	< <u>F13206</u>	in product database, inactive	>
267	< <u>F13217</u>	in product database, inactive	>
268	< <u>F13266</u>	in product database, inactive	>
269	< <u>F13582</u>	in product database, inactive	>
270	< <u>F13315</u>	in product database, inactive	>
271	< <u>F13614</u>	in product database, inactive	>
272	< <u>F13614SP</u>	in product database, inactive	>
273	< <u>IITEST</u>	in product database, inactive	>
274	< <u>Line 6 (Parent's Taxable Income)</u>	RegExp	>
275	< <u>Step 2. Figuring a Tentative Tax at the Parent's Tax Rate (Form 8615, Part II)</u>	RegExp	>
276	< <u>Line 1 (Investment Income)</u>	RegExp	>
277	< <u>Step 1. Figuring the Child's Net Investment Income (Form 8615, Part I)</u>	RegExp	>
278	< <u>Line 3</u>	RegExp	>
279	< <u>Line 2 (Deductions)</u>	RegExp	>

349	< <a href="#"><u>Box 10-Country</u></a>	<a href="#"><u>RegExp</u></a>
350	< <a href="#"><u>Box 1-Name</u></a>	<a href="#"><u>RegExp</u></a>
351	< <a href="#"><u>Box 4-Benefits Repaid to SSA in 2008</u></a>	<a href="#"><u>RegExp</u></a>
352	< <a href="#"><u>Box 2-Beneficiary's Social Security Number</u></a>	<a href="#"><u>RegExp</u></a>
353	< <a href="#"><u>Box 5-Net Benefits for 2008</u></a>	<a href="#"><u>RegExp</u></a>
354	< <a href="#"><u>Schedules (Form 1040) D</u></a>	<a href="#"><u>PFT //</u></a>
355	< <a href="#"><u>Schedule D, (Form 1040), how to report</u></a>	<a href="#"><u>PFT //</u></a>
356	< <a href="#"><u>Examination of Returns, Appeal Rights, and Claims for Refund</u></a>	<a href="#"><u>PFT //</u></a>
357	< <a href="#"><u>HOW TO GET MORE INFORMATION</u></a>	<a href="#"><u>PFT -/</u></a>
358	< <a href="#"><u>HOW TO GET TAX HELP</u></a>	<a href="#"><u>PFT -/</u></a>
359	< <a href="#"><u>2002 Change</u></a>	<a href="#"><u>PFT //</u></a>
360	< <a href="#"><u>2002 Forms W-2 and Form 1099-R</u></a>	<a href="#"><u>PFT //</u></a>
361	< <a href="#"><u>2003 Change</u></a>	<a href="#"><u>PFT //</u></a>
362	< <a href="#"><u>52-53-Week Tax Year</u></a>	<a href="#"><u>PFT //</u></a>
363	< <a href="#"><u>Accounting to Your Client</u></a>	<a href="#"><u>PFT //</u></a>
364	< <a href="#"><u>Additional Information</u></a>	<a href="#"><u>PFT //</u></a>
365	< <a href="#"><u>Additional Taxes</u></a>	<a href="#"><u>PFT //</u></a>

1267 < <u>Forms 1099</u>	<u>in PFT but not in product list</u>	>
1268 < <u>Fuel</u>	<u>in PFT but not in product list</u>	>
1269 < <u>F940 and 940-EZ Employer's Annual Federal Unemployment Tax Returns</u>	<u>in PFT but not in product list</u>	>
1270 < <u>F940 and 940-EZ</u>	<u>in PFT but not in product list</u>	>
1271 < <u>FUTA</u>	<u>in PFT but not in product list</u>	>
1272 < <u>Federal Unemployment (FUTA) Tax-U.S. Virgin Islands Employers Only</u>	<u>in PFT but not in product list</u>	>
1273 < <u>F8027</u>	<u>in PFT but not in product list</u>	>
1274 < <u>F8027T</u>	<u>in PFT but not in product list</u>	>
1275 < <u>2003 Withholding Rate Changes</u>	<u>no occurrence, except for key topics, forms and pubs</u>	>
1276 < <u>2007 Estimated Tax Worksheet</u>	<u>no occurrence, except for key topics, forms and pubs</u>	>
1277 < <u>AEIC</u>	<u>no occurrence, except for key topics, forms and pubs</u>	>
1278 < <u>ATF Form 5630.5</u>	<u>no occurrence, except for key topics, forms and pubs</u>	>

# Lessons learned

- Reality is semantically messy.  
There are multiple perspectives on reality, and we'd better respect them.
- Nobody can prevent information from changing all the time. Accommodate change!
- Knowledge integration skills are different from domain specific skills – and sometimes the reflexes conflict.
- Perfection is not affordable and not necessary.



# Questions?

Michel Biezunski

Infoloom

[mb@infoloom.com](mailto:mb@infoloom.com)

<http://www.infoloom.com>

Steve Newcomb

Coolheads Consulting

[srn@coolheads.com](mailto:srn@coolheads.com)

<http://www.coolheads.com>