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282B-WF-2896615

Continuation of FD-302 of Interview of [REDACTED], On 08/06/2013, Page 4 of 6

b6 -2
b7C -2

if [REDACTED] still had it. She provided a copy. [REDACTED] found this to be strange, as her letter, even if it had not been sent, should have been in the case file. As a member of QA she is knowledgeable about accuracy statistics for QA reviews. [REDACTED] was guessing, but estimated that 75% of applications for 501(c)(3) status were done right while 85% to 90% were done right for 501(c)(4) status. She keeps a spreadsheet for QA on all statistics. At one point advocacy was tracked separately in QA.

Every application is logged into EDS and TEDS. These systems would show her cases if a query is run with her identification number. [REDACTED] identification number is [REDACTED]. She worked her cases 100% of the time using the hard copy of the case. TEDS is slow and not user friendly for complex cases.

b6 -2
b7C -2

The Tea Party was added to the emerging issues tab of the BOLO list in July or August of 2010. [REDACTED] gave the wording for the Tea Party terminology. She believes [REDACTED] was on the "Cc:" line of that communication. She sent a test run of the spreadsheet first to [REDACTED] and [REDACTED] and then a few days later sent it to [REDACTED]. [REDACTED] had no substantive comment. She tried to send it to EO Technical, but by accident sent it to all personnel in Washington, D.C. She was embarrassed and retracted it, and then resent it to Cincinnati. [REDACTED] from Washington called to ask what the BOLO was, and she told him what it was. Other than that, no one made any comments to her about the content of the BOLO. [REDACTED] was in charge of the other documents in the spreadsheet. [REDACTED] actually came up with the name BOLO (Be On the Look Out). But since he was a manager he could not win a naming contest where the prize was 59 minutes of administrative time. So he gave [REDACTED]. She left [REDACTED] group before she could ever [REDACTED].

b6 -2,3
b7C -2,3

[REDACTED] was shown a copy of a spreadsheet of Tea Party cases (a copy of this spreadsheet will be maintained in the 1A section of the case file). While not the same spreadsheet, she was forwarded one similar by [REDACTED] early on which she used to keep track of the cases and update for her own knowledge.

b6 -2,3
b7C -2,3

In early 2011 [REDACTED] was involved in a meeting with [REDACTED] where new agents had started working the advocacy cases. [REDACTED] was in charge of the advocacy case project, which was hopeful of getting everyone on the same page on working these cases. [REDACTED] had to send a QA reviewer to the meeting since these are mandatory review cases so [REDACTED] went. It was typical of the IRS to create groups like this. The Internal Revenue Manual (IRM) section 7.20.4 defines what are mandatory review cases, which include political activities and all denials. [REDACTED] answered questions about

b6 -2,3
b7C -2,3

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