



2010 Meeting Minutes

Notice Improvement Project Committee Meetings

- December 9, 2010
- November 10, 2010
- October 13, 2010
- September 8, 2010
- August 11, 2010
- July 14, 2010
- June 9, 2010
- May 25-26, 2010
- April 14, 2010
- March 10, 2010
- February 10, 2010

Annual Meeting
Notices Improvement Issue Committee
Thursday, December 9, 2010
Washington, DC
1:00 pm – 4:00 pm (EDT)

Program Owners

- Patterson, Jodi, Director, Office of Taxpayer Correspondence

Designated Federal Official

- Morizio, Louis, TAP Program Manager

Committee Members Present

- Bernstein, Mark
- Brandewie, Shaun
- Fishman, Annie
- Granger, Jacqueline
- Johnson, Frances
- Kalimeris, Angeliki
- Kelly, Eileen
- Kim, John
- Miller, Ernest, Chair
- Murray, Alan, Vice Chair
- Phillips, Beverly

Committee Members Absent

- Boyle, Raymond
- Feng, Andrew

TAP Staff

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



Welcome/Announcements

Miller welcomed everyone to the meeting. All members and staff introduced themselves. Miller thanked everyone for the flexible cooperation on last year's projects.

2010 Accomplishments

Miller mentioned that one subcommittee is finishing up projects from last year. This project is Frequently Asked Questions on landing pages for new notices.

Completed projects for 2010 were:

- Correspondence letters- editing and reviewing paragraph headings
- Comparing DAT Scoring system which is used to review the letters for clarity and comparing it with a British generic score card.
- Reviewing 20 most frequent used Correspondence letters

Structure of TAP and Notice Committee

- Miller stated that TAP project committees are a representation of the seven areas of TAP. He defined the difference between Area and Project Committees.
- Miller mentioned that the subcommittee always has a lead. Each member must be responsible for their assignment. The team lead is just responsible for coordinating the work, not doing all of the work.
- Program managers are responsible to program owners and must meet deadlines; TAP Staff is not responsible for the projects.
- Jenkins mentioned that some assignments will not be privy to the public, so members should not share assignments with family members and or friends. Jenkins also stated that when members receive emails, it will state TAP: Notice Committee in the subject line as well as ACTION if immediate action is needed.
- Morizio stated that Jenkins is the primary contact, and that members should address Jenkins with a copy to Odom, (back-up) analyst and Morizio as well.

Expectations

Miller stated to members, if they cannot attend meetings, it is their responsibility to inform the TAP staff, and the Chair of the committee.

The face-to-face meeting creates an opportunity to get to work on projects as a team together.

Program Owner Presentation (Making a Noticeable Difference)

Patterson presented a PowerPoint to the members and staff; she discussed the following topics as part of her presentation:

- What's wrong with taxpayer correspondence?
- Current notices are confusing and lack consistency
- IRS Vision is to deliver correspondence to taxpayers
- A study of the initial Under-reporter Notice the CP2000 illustrate the taxpayer's fragmented experience.
- The redesigned CP2000 is expected to make it much easier for taxpayers to understand and comply with their tax responsibilities.
- Improvements in taxpayers correspondence will lead to both taxpayer and business focused outcomes.

2011 Committee Assignment

The committee will be assigned 60 new notices to provide Frequently Asked Questions to be loaded on the landing pages.



Election of new Chair and Vice Chair

Ernest Miller – Chair

Alan Murray - Vice Chair

The committee decided:

- Quorum will be 50% of the membership plus 1.
- Monthly teleconferences on every 3rd Thursday of each month at 2:00pm EST.
- Face-to-Face meeting is May 2, through May 4th, including days for travel. Possible locations are NYC, Seattle, Miami, Denver or Chicago. A cost comparison analysis will be done to decide which city will be chosen.

Closing: Miller stated that he is looking forward to a good year working with each panel member. Murray stated as well "hit the ground running" same as last year.



**Notices Improvement Issue Committee
November 10, 2010
Teleconference
2:00 – 3:00 pm (EDT)**

Program Owners

- Kieliszek, Charlotte, Senior Analyst OTC

Designated Federal Official

- Morizio, Louis, Tap Program Manager

Committee Members Present

- Boyle, Raymond
- Davis-Nozemack, Karie
- Feng, Andrew
- Flanders, Seth
- Gambardella, Linda
- Johnson, Frances
- Lee, Bradford
- Miller, Ernest, Chair
- Murray, Alan
- Woodard, Norma, Vice Chair

Committee Members Absent

- Bernstein, Mark
- Head, Randee
- Holland, Richard

TAP Staff

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

Public Participation

- Ms. Bored, Tax Resources
- Ms. Cummings, Tax Resources
- Rasey, Howard, W&I Research and Analysis

Welcome/Announcements

Miller welcomed everyone to the call. Quorum was met.

Office of Notice Improvement Update, (OTC)

Miller welcomed Charlotte Kieliszek, the liaison from the OTC to the teleconference. She stated the following:

- A permanent liaison will be assigned to the Notices Improvement Issue Committee in January 2011.
- OTC is serving as the central hub for all correspondence within the IRS. In addition, OTC is responsible for implementing the new sign language law.



- Due to the continuing resolution, Kieliszek's office is unable to fill some vacant positions until further notice.
- A few big projects are being looked at; TAP's review of Correspondex letters will be added to a much bigger project.
- OTC is looking for a user friendly system - one that creates a better product that helps taxpayers, since the Correspondex system is over 30 years old.
- OTC is very pleased with the responses from the public on the landing pages FAQ. Kieliszek asked members to go back and look at the ones that were done without TAP's and provide suggestions on how to make it better.
- TAP will continue to do notice reviews using the DAT scoring.

Subcommittee Update (Landing Pages and Correspondex letters)

Boyle stated that he is expecting to have final comments this week. He stated that his subcommittee has reviewed the landing pages and have some recommended questions for - CP12, 16, 24, 25, 71, 171, 259, 566, 504, and 504B. Boyle stated that he will be sending his subcommittee's response to Analyst Knispel this week.

Murray thanked Woodard, Johnson, Davis-Nozemack and Miller for their assistance in completing the 20 Correspondex letters. Jenkins stated that the Correspondex letters were elevated to the OTC.

Annual Meeting

Miller mentioned to members that they should contact the Florida Office secretary, Anita Fields to make their travel arrangements if they have not done so. Miller also stated that if the panel members are interested in running for chair positions, there will be an election at the annual meeting.

Morizio mentioned that TAP's meeting time has been cut from five hours at the last annual meeting to three hours this year. During the three hour meeting time, all administrative items will be discussed. In addition, time will be given to work any projects assigned by Kieliszek and Patterson.

Office Report

Morizio thanked Woodard for her service to the committee. He also thanked the returning members for their service as well. Morizio mentioned to members that when they receive the new project committee list via email, they should check off the Project Committee. Morizio stated to the members that he would love to have them return to the committee to continue their work.

Woodard stated that she appreciates the TAP Staff Support and leadership with Miller. She mentioned to the returning members that they should consider staying on with the Notices Improvement Committee.

Public Participation

The public attendees had no comments or questions for the Notices Project Issue Committee members.

Closing Remarks

Miller thanked everyone for joining the call; he also thanked the Brooklyn, NY staff for their support and the committee members for the job they have done.

Next meeting

December 9, 2010, Washington, DC.



Notices Improvement Issue Committee
October 13, 2010
Teleconference
2:00 – 3:00 pm (EDT)

Program Owners

- Cesarano, Jim

Designated Federal Official

- Morizio, Louis

Committee Members Present

- Bernstein, Mark
- Boyle, Raymond
- Davis-Nozemack, Karie
- Feng, Andrew
- Flanders, Seth
- Head, Randee
- Johnson, Frances
- Lee, Bradford
- Miller, Ernest, Chair
- Murray, Alan

Committee Members Absent

- Gambardella, Linda
- Holland, Richard
- Woodard, Norma, Vice Chair

TAP Staff

- Babb, Rose A.
- Odom, Meredith

Welcome/Announcements

Miller welcomed everyone to the call. Quorum was met. Miller mentioned that at the last Joint Committee teleconference call in September, some issues on the agenda were not addressed due to lack of time. Miller stated that he will ensure that the issue process for submitting project committee issues are addressed at the next JC teleconference call on October 26.

Office of Notice Improvement Update

Cesarano stated the following:

- There are no specifics to discuss at this teleconference. An analysis was done on the OTC, and a reorganization plan has been worked out. There are now 60 positions in their OTC office. His department is waiting for a Request for Organizational Change, (ROC) document to be signed by the for the reorganization to be complete on the new Office of Taxpayer Correspondence (OTC).
- This is Cesarano's last teleconference call as the liaison for TAP. there will be a new liaison from Jodi Patterson's office assigned to work with TAP. The relationship with TAP will remain the same and in addition, the office will improve the project methodology.
- OTC has prepared and drafted responses to the three referrals received. Patterson wants to work on the feed back methodology between OTC and TAP members. The emphasis is now on comments and less on the DAT scores.



- Question 2, 3, 5 and 6 on the DAT are welcomed additions but how to implement it has to be worked out. Patterson is waiting for the Correspondex letter review or the top 20 high volume letters.
- Some examples of prototypes for the landing pages were emailed to Jenkins.

Subcommittee Update (Landing Pages)

Boyle reported that his subcommittee has 30 variations of notices given to them for review. He stated that there are four subcommittees working on the notice reviews. Boyle is reviewing the notices as they are assigned and recommending questions taxpayers need answers on. The first subcommittee group has a deadline of October 20 and the second November 10. Boyle stated that there will be a final report written by him. Each subcommittee will agree before sending him their comments any FAQs to be included in his final report.

For future projects, Boyle suggests the use of the evaluation tool to provide feed-back and information on the Landing page FAQ project. He stated that the subcommittee was asked to address questions in the British DAT Score format that they would like to incorporate in the Landing pages project. Boyle also stated that the use of the evaluation tool will address the Landing Page project that is subjective and open-ended.

Correspondex Letters

Murray stated that he prepared a draft of the Executive Summary. He mentioned that he needs advice from TAP staff on how to format the EC Document. He will attach the comments made regarding the individual correspondex letters. In addition, Murray stated that he is close to the finishing up the write up of the executive summary. Murray thanked the members of the subcommittee; he stated that the suggestions were excellent.

Morizio stated that Jenkins will work with Murray on the heading and summary on the referral form. If the committee is okay with the summary, Morizio stated that it should be forwarded to Cesarano and subsequently to the JC teleconference on October 26.

Morizio stated that there is one more teleconference in November. After that, the New TAP year begins with the annual conference held in Washington, DC in December. He also stated that he would like members to work on completing their annual projects before the next meeting to start fresh in the new TAP year. He also mentioned that the long term projects can roll into the New Year and that a good clean cut off is good for the annual report.

Publication Participation

None.

Closing

Miller thanked everyone for attending the meeting. He mentioned that if panel members need any assistance to complete projects, they should ask for help.

Miller and Morizio both thanked Cesarano for his work as a liaison with TAP.



Notices Improvement Issue Committee
September 8, 2010
Teleconference
2:00 – 3:00 pm (EDT)

Program Owners

- Cesarano, Jim

Designated Federal Official

- Morizio, Louis

Committee Members Present

- Boyle, Raymond
- Davis-Nozemack, Karie
- Feng, Andrew
- Flanders, Seth
- Head, Randee
- Johnson, Frances
- Lee, Bradford
- Miller, Ernest, Chair
- Murray, Alan
- Woodard, Norma, Vice Chair

Committee Members Absent

- Bernstein, Mark
- Davis-Nozemack, Karie
- Gambardella, Linda
- Holland, Richard
- Lees, John

TAP Staff

- Jenkins, Audrey
- Odom, Meredith

Welcome/Announcements

Miller welcomed everyone to the call. Quorum was met. Miller thanked Boyle's subcommittee for the work they have done on British Assessment Scorecard and DAT Assessment Tools. Those projects were elevated and approved by the Joint Committee.

Office of Notice Improvement Update

Cesarano mentioned to members that the end of the fiscal year budget is September 30, and that the new fiscal year begins October 1. He stated that he will be attending a meeting in Washington, DC regarding the new reorganization of the Office of Taxpayer Correspondence. Cesarano will provide feedback to members on what it means to the projects they are working on.

Cesarano stated the following:

- He received some referral forms on British Assessment Scorecard and DAT Assessment Tools from Boyle's subcommittee
- The Office of Taxpayer's Correspondence Executives have changed the process for reviewing Notices. Cesarano will inform TAP Staff and panel members when he receives information on the OTC's new procedures and how stakeholders' opinion will be incorporated.
- The landing pages project's redesign is due on January, 2011. Cesarano discussed the procedures at the last subcommittee call on September 2. Some of those procedures were:
- Members should think about what questions taxpayers would want answered.
- Look at the prototype notices for sections on answers to common questions.



- Regarding the Correspondex comments, members have a choice of using a spreadsheet. Cesarano suggests that the least work would be to prepare an Executive Summary and insert some comments on what the general comments are.

Subcommittee Update

Boyle mentioned the landing pages project that is due for completion on January 2011. He stated that TAP's Office should ensure that the work is spread out evenly to meet that deadline. Boyle stated that for future meetings, he would like to suggest discussions on forming a Quality Review Committee within Notices Improvement Project Committee. This QR would be formed to explore formatting issues for recommendations submitted to the JC. Morizio asked Miller to seek clarification on the Joint Committee's procedures on formatting at the next JC meeting.

Murray stated that his subcommittee is working on the 20 Correspondex letters that were assigned. Each subcommittee member was given 4 Correspondex letters to review. They were reviewed by paragraphs and comments were added. The subcommittee is about to prepare their Executive Summary to submit to Cesarano. Murray mentioned that the use of the DAT Scoring was great and that the new procedures are complex for reviewing the Correspondex letters.

Office Report (DFO)

Morizio mentioned to members that if they need assistance with write ups for recommendations, they should feel free to contact him and Project Committee Analyst(s) Jenkins and Odom for assistance.

Jenkins' detail as the Database Analyst has ended and she is back as the primary analyst for the Notices Improvement Project Committee. Morizio thanked Odom for her work as the primary analyst for the detail period and reminded the committee members that she will continue to be the back up analyst.

Public Participation

None.

Action Plan

- Miller will seek clarification on the next Joint Committee call on the QR procedures that involves formatting issues for project committees.
- Odom will email members a summary of the subcommittee's meeting minutes on September 2nd.

Closing Remarks

Miller thanked members for their hard work.

Next teleconference: October 13, 2010.



Notices Improvement Issue Committee
August 11, 2010
Teleconference
2:00 – 3:00 pm (EDT)

Program Owners

- Cesarano, Jim
- McHenry, June

Designated Federal Official

- Morizio, Louis

Committee Members Present

- Bernstein, Mark
- Boyle, Raymond
- Flanders, Seth
- Gambardella, Linda
- Head, Randee
- Johnson, Frances
- Lee, Bradford
- Miller, Ernest, Chair
- Murray, Alan

Committee Members Absent

- Davis-Nozemack, Karie
- Feng, Andrew
- Holland, Richard
- Woodard, Norma, Vice Chair

TAP Staff

- Babb, Rose A.
- Odom, Meredith

Welcome/Announcements

Miller welcomed everyone to the call, quorum was met.

Office of Notice Improvement Update

Morizio introduced June McHenry as the new program owner contact that has joined the Office of Taxpayer Correspondence. McHenry gave a brief background of herself to the panel members.

Cesarano stated that he received an email with some correspondex letters from Murray's subcommittee. He will review the correspondex comments and then forward them to McHenry for further review. If McHenry approves of the comments, she will send them to Patricia Davis, Supervisory Program Analyst, who will elevate the comments to the executive level.

Subcommittee Update

Murray stated that his subcommittee submitted some correspondex letters to Cesarano for review. Murray will wait for Cesarano to review the correspondex letters and will also set up a teleconference with him for guidance on preparing an executive summary. A completion date on this project is set for mid September.

Boyle stated that he submitted follow-up on two recommendations discussed during the face to face meeting in May – the British Assessment Scorecard and the DAT assessment tool for use with the notices coming from the new IRS Office of Taxpayer Correspondence. Morizio mentioned that Boyle's subcommittee recommendations will be put together by Odom in proper format as a prepread for the next Joint Committee teleconference on August 24.



Miller added that his observation of the correspondex letters and title of subjects contains irrelevant information in the letters sent to taxpayers.

Boyle also mentioned that his subcommittee is working on the new website for landing pages for the new Office of Correspondence. Those comments will be compiled into one report. Overall, the links were good. Some observations of inconsistencies were made to help improve the website. Boyle thanked those panel members on his subcommittee that have responded with comments.

Office Report

Odom stated it was great working with the Notice Improvement Issue Committee for the last three months as the Program Analyst and that Jenkins will be back beginning Monday, August 16 as the Notice Improvement Issue Committee's Primary Program Analyst. Morizio asked panel members to address Jenkins and Odom the back up analyst in all correspondence and copy him as well. In addition, Morizio thanked Odom for doing the job as the Program Analyst for three months.

Public Participation

None.

Closing Remarks:

Miller thanked everyone for joining the call. Next teleconference is September 8, 2010.



Notices Improvement Project Committee
July 14, 2010
Teleconference
2:00 – 3:00 pm (EDT)

Program Owner

- Gardner, Sidney

Designated Federal Official

- Morizio, Louis

Committee Members Present

- Bernstein, Mark
- Boyle, Raymond
- Davis-Nozemack, Karie
- Feng, Andrew
- Flanders, Seth
- Head, Randee
- Holland, Richard
- Johnson, Frances
- Kear, Lea
- Lee, Bradford
- Lees, John
- Miller, Ernest, Chair
- Murray, Alan
- Woodard, Norma, Vice Chair

Committee Members Absent

- Gambardella, Linda
- Holland, Richard

TAP Staff

- Babb, Rose
- Odom, Meredith

Welcome/Announcements

Miller welcomed everyone to the call and introduced the new TAP member Seth Flanders from Allenton, PA. Miller explained to panel members the requirements for the Joint Committee to approve all completed projects. He also mentioned that the DAT Scoring Correspondex letters proposal was approved by the Joint Committee, and thanked Woodard and her subcommittee for working on and completing their projects.

Office of Notice Improvement

Gardner mentioned that his office is still working on its reorganization and that it has been very busy recently. He reiterated Cesarano's discussion at the last teleconference on the assignments panel members were given

- Landing Pages FAQ – the first 9 notices; the remaining 11 notices are still being prepared by the Office of Taxpayer Correspondence and will be available within the next few weeks.
- The top 20 Correspondex letters will be reviewed for clarification issues before they are sent to taxpayers. The Correspondex letters were sent to Odom for distribution to the panel members.

Subcommittee Update

Boyle stated that his subcommittee is up to a great start. He asked panel members to look at the letters page by page including the Q and As. He has received a few evaluations from panel members. In a few weeks, he will have a committee conference call to discuss those evaluations. Boyle sent Odom an evaluation page. Boyle added that he will be writing up the issue on the DAT Scoring



changes related to the new Correspondex notices along with the integration on British model score card recommendations.

Murray stated that he is looking at the 20 Correspondex letters that are sent most frequently to taxpayers. He stated that his subcommittee is not using the DAT Scoring System but is simply reviewing the letters from the taxpayer's viewpoint. There was a teleconference with Cesarano for guidance on how to go about the review. The Correspondex letters were assigned to each panel member. Each member were given four letters as the first reader and then reviewed by other panel members. Murray sent his copies to Cesarano. The review will be sent to Odom and Morizio. Murray said that the August 20th deadline will be met.

Office Report

Morizio stated to panel members that he appreciates the job they are doing. Woodard's subcommittee issue was presented to the Joint Committee, where it was reviewed and approved. Gardener will receive a copy. Boyle's subcommittee issue from the face to face meeting in May will be presented to the Joint Committee and Gardner as well when Boyle completes the write-up.

Morizio informed panel members of some discussions at the Joint Committee face to face meeting last week. One of the issues he highlighted to panel members was the Notice and Tax Forms and Publications Committees are usually presented with very short turn around projects that need to be responded to immediately. At times a response is required to the program owner before the issue can be presented to the Joint Committee. The Joint Committee has decided that a draft of the project should be presented to Cesarano or Gardner while the committee awaits the approval of the Joint Committee subsequently. Once approved, the issue is finalized.

Closing Remarks

Miller thanked everyone for joining the call.

Next Teleconference

August, 17, 2010 at 2:00pm.



Notices Improvement Issue Committee
June 9, 2010
Teleconference
2:00 – 3:00 pm (EDT)

Program Owner

- Cesarano, Jim

Designated Federal Official

- Morizio, Louis

Committee Members Present

- Bernstein, Mark
- Boyle, Raymond
- Johnson, Frances
- Lee, Bradford
- Miller, Ernest, Chair
- Murray, Alan
- Woodard, Norma, Vice Chair

Committee Members Absent

- Case, Ann
- Davis-Nozemack, Karie
- Feng, Andrew
- Gambardella, Linda
- Head, Randee
- Holland, Richard
- McQuiston, Robert

TAP Staff

- Babb, Rose A.
- Odom, Meredith

Welcome/Announcements

Miller welcomed everyone to the call, but quorum was not met; therefore, the meeting was administrative. The minutes for the face to face meeting in Detroit, MI were posted to TAP Space for review and will be discussed at the next teleconference on July 14.

Office of Notice Improvement Update

Cesarano discussed the following:

Patterson would like panel members to review a list of 20 Correspondex letters; the letters are available on the intranet through the link SERP. Odom would provide panel members with the list of letters. Cesarano also stated that DAT scoring may not be necessary. Patterson is concerned about the impression of the Correspondex letters from the taxpayers' perspective, so quality and style is not important for this review.

On the new notices, Cesarano stated that Patterson would like panel members to take a look at the landing pages FAQ section. She thinks that panel members may find that there are questions that need to be added to assist taxpayers; this is a long term project. Morizio stated that Cesarano will provide the details to Odom for distribution to the panel members. Morizio suggested that the committee be separated into two sub committees - (1) Top 20 Correspondex letters for Review and (2) Landing Pages FAQ. Odom will send an email to panel members requesting their choice of subcommittee to join.

Subcommittee Update

Boyle stated that the subcommittee provided a report for the face to face meeting in Detroit, MI in



May. His subcommittee looked at DAT Scoring and how it would be applicable to the new Correspondex that was recommended. Some additional changes were suggested after reviewing the British model provided by Cesarano. Those changes will be written up by Boyle.

During the subcommittee break out, Boyle mentioned that they were given another assignment Quality Score Card concept. Two questions were asked, can the British score card be used and is there anything else than can be considered to make it better? One of the issues that were looked at was the evaluation of penalties and interest.

Woodard stated that Murray and her subcommittee combined and discussed the issues that Cesarano had previously raised to ensure that the subcommittees had normed all aspects and that individual scores are compiled into total scores. She stated that this can be accomplished by making some adjustments to the scoring sheets. Odom will provide the adjustment pages to the panel members.

Office Report

Morizio stated that TAP is in the middle of scheduling interviews for TAP positions and that Area 1 had their face to face meeting June 4 and 5. The TAP office is very busy but, will be back on a normal routine in another week. The Joint Committee face to face will be on July 8, 9 and 10 in Chicago, IL.

Public Participation

None.

Closing Remarks: Miller thanked everyone for joining the call. Next teleconference is July 14, 2010.



**Taxpayer Advocacy Panel (TAP)
Notices Improvement Issue Committee
Face to Face Meeting – Detroit, Michigan
Meeting Minutes
May 25-26, 2010**

- Tuesday, May 25, 2009
- Wednesday, May 26, 2009

Designated Federal Official

- Morizio, Louis

Committee Members Present

- Bernstein, Mark
- Boyle, Raymond
- Davis-Nozemack, Karie
- Head, Randee
- Holland, Richard
- Johnson, Frances
- Lee, Bradford
- McQuiston, Robert
- Miller, Ernest, Chair
- Murray, Alan
- Woodard, Norma, Vice Chair

Committee Members Absent

- Case, Ann
- Feng, Andrew
- Gambardella, Linda

Staff Present

- Babb, Rose, Management Assistant
- Odom, Meredith, Program Analyst
- Patterson, Jodi, Director of Office of Taxpayer Correspondence
- Gardner, Sidney, Program Manager Office of Taxpayer Correspondence

Tuesday, May 25, 2010

Welcome/Announcements

Miller opened the meeting and welcomed everyone. Quorum was met.

Office of Taxpayer Correspondence

Before beginning her presentation, Patterson asked each panel member including IRS staff members to introduce themselves.

Patterson began the meeting with a presentation on Redesigning of Correspondence Notices. She discussed the following:

- New centralized responses to Notices
- Logic, layout, design and readability of Notices
- Areas of differences and low comprehension
- Identify areas of confusion and redesigning of Notices
- Centralized authority and responsibility for redesigning Notices.
- DAT Testing Format surfaced issues from May 2010 Report from Bernstein, Boyle, Holland and McQuiston
- Continue using DAT- Limited use does not tell why a "grade" was received



- Review highest volume letters, get copies to TAP panel members on the top 10-20 letters
- Review of the new letters for generic or systemic comments
- Send in mark-up for review and feed back
- Q & A for Notice on the webpage

Patterson mentioned that:

1. The OTC is in the process of redesigning the office.
2. There will be centralized authority and responsibility for redesigning the logic, layout and readability of the Correspondex Notices.
3. The role of her office is to use simplified language for all Notices by January 11, 2010.
4. A (FAQ) list of the most critical math errors should appear on the IRS website for Notices.

McQuiston mentioned that he thinks focus groups are helpful for Notices CP-08 and 130. He noted that Notice CP-130 has many grammatical errors. He mentioned that the design is fine but, there is a huge problem when dealing with specifics writing and language in notices.

DFO Report

Morizio thanked everyone for their work and mentioned beginning the first week of June; interviews for new panel members will be conducted. Morizio also mentioned that he needs panel volunteers' assistance to interview applicants for the TAP volunteer program.

TAP Program Manager Nicholas from IRS Seattle Office, is on a Detail assignment as the Local Taxpayer Advocate for Seattle. William Mezger is the Acting TAP Manager until further notice. Gardner commented on some points highlighted in Patterson's presentation. He stated that the Notices should be looked at in terms of the language and that most inserts with Notices sent to taxpayers are no longer needed.

Subcommittee Breakout

Members worked with their respective committees to discuss their assignments.

Vice Chair Woodard's subcommittee along with Alan Murray collaborated on determining the best way to norm scores for Correspondex Letters. After considerable discussion, the subcommittees recommended that some modifications be made to the existing DAT Score sheet that will allow for each part of the Correspondex letters (Introduction, Body, and Conclusion) to be scored individually and then normed by the assigned committee. Odom will add some columns to assist with DAT Scoring.

Boyle reported that his subcommittee looked at the British Scorecard for specific questions that can be added to DAT. The subcommittee also discussed using an average rather than norming. This will allow the committee to accomplish short deadline projects and still submit the draft proposals, which can then receive the approval of the Joint Committee.

Public Participation

None

Closing

Miller closed the meeting and reminded panel members to meet on Wednesday, Morning, May 26th for the Notices tour.

Wednesday, May 26, 2010

Designated Federal Official

- Morizio, Louis



Committee Members Present

- Bernstein, Mark
- Boyle, Raymond
- Head, Randee
- Holland, Richard
- Johnson, Frances
- Lee, Bradford
- McQuiston, Robert
- Miller, Ernest, Chair
- Murray, Alan

Committee Members Absent

- Case, Ann
- Feng, Andrew
- Gambardella, Linda
- Davis-Nozemack, Karie
- Woodard, Norma, Vice Chair

Staff Present

- Babb, Rose, Management Assistant
- Coleman, Sherjuna, Supervisor Analyst, Distribution – Detroit
- Gardner, Sidney, IRS Program Manager
- Grysiak, Hildi, Chief, Technical Support Section
- Kilcoin, John, Program Analyst
- Odom, Meredith, Analyst
- Smith, Keith, CPS Branch Chief

Public Participation None

TAP members and IRS staff were given a tour of the IRS CPS Detroit Site. Handouts were given to all panel member and IRS staff employees. The handouts provided an overview of the IRS taxpayer correspondence printing system. Kilcoin gave a presentation and tour of the correspondence production service printing site.

Closing Remarks

Morizio thanked the members for their work.

Miller thanked the panel members for their participation and hard work.

Next teleconference will be Wednesday, June 9th at 2:00 pm.



Notices Improvement Issue Committee

April 14, 2010

Teleconference

2:00 – 3:00 pm (EDT)

Program Owner

- Cesarano, Jim
- Gardner, Sidney

TAP Director

Collins, Shawn

Designated Federal Official

- Morizio, Louis

Committee Members Present

- Bernstein, Mark
- Boyle, Raymond
- Davis-Nozemack, Karie
- Head, Randee
- Holland, Richard
- Johnson, Frances
- McQuiston, Robert
- Miller, Ernest, Chair
- Murray, Alan
- Woodard, Norma, Vice Chair

Committee Members Absent

- Case, Ann
- Feng, Andrew
- Gambardella, Linda
- Lee, Bradford

Other Attendees (Office of Taxpayer Correspondence, OTC)

- Faye, Denise
- Kieliszek, Charlotte
- Patterson, Jodi, Director of OTC

TAP Staff

- Babb, Rose
- Odom, Meredith

Welcome/Announcements

Miller welcomed everyone to the call.

Office of Taxpayer Correspondence

Patterson gave an over view of her office and asked panel members for ways her office can work with them in the future. She discussed that her department is in the process of redesigning the notices that are sent to taxpayers. There are over 1,000 types of letters designed for taxpayers, but wants the message in each letter to be simplified. Patterson stated that her staff is working with an outside contractor that specializes in simplifying communications across the board. The objective is to look at the process holistically from the taxpayer's view and create a contact repository.

Murray noted to Patterson that TAP uses a scoring system to review the Notices and that there are various criteria used for grading documents before returning them to the IRS. Murray also noted that



Patterson mentioned having the notices reviewed by an outside company and that TAP is already charged with the responsibility of reviewing the notices.

Patterson stated that the Murray's feedback is helpful in understanding what the Notices Improvement Issue Committee is charged with.

Collins mentioned that since Patterson's office is now the Office of Taxpayer Correspondence, she foresees that TAP members will be able to play a role in providing assistance through the Notice Improvement Issue Committee.

Morizio mentioned that Gardner and Cesarano have given the committee an assignment to re-evaluate the DAT Scoring System. The objective is to decide if the DAT Scoring System should be changed or not. Morizio also mentioned that he thinks the panel members would like to have more input into the Notices and that the DAT Scoring sheet should have additional spaces for more comments. Morizio provided clarification to Patterson on what panel members look for in the DAT Scoring process.

Office of Notice Improvement

Gardner mentioned that at the Annual Meeting last December, he discussed DAT Scoring, and provided TAP group with other types of projects that would impact Notices Improvement and the process for evaluation of inserts that were mailed with letters to taxpayers.

Gardner and Cesarano's office will be migrating into the Office of Taxpayer Correspondence effective the last week of May. Gardner mentioned that he would like to continue working with TAP Notices Improvement Committee. Patterson will inform the TAP office if there are any changes with regard to Gardner and Cesarano's assignments within the OTC. For the face to face meeting in Detroit, Gardner mentioned that he has arranged for a presentation at the print site.

Morizio mentioned that panel members are flexible with their assignments. They are dependent on Patterson for projects to work on.

Kieliszek stated that during the next few months, the IRS website will have notices translated into five most common languages. These translated notices will be in a template format.

New Procedures

Morizio informed panel members, that according to the newly revised TAP Charter, every issue must be approved by the Joint Committee. Except for a focus group, anything decided by consensus must be approved by the Joint Committee. Morizio also mentioned that panel members should be careful with any issues assigned with a short turn for example (7-10days) turn around time. If panel members receive projects with short turn around times, they should provide a draft to Gardner in order to meet the time frame and also send a copy of the draft to the Joint Committee as well for final approval.

Subcommittee Update

Boyle stated that his subcommittee is looking at the current DAT Tool and how applicable it is in evaluating the new correspondence from the OTC. Boyle also stated that his subcommittee plans to finish up their assignment on the DAT Tool at the face to face meeting in Detroit, MI on May 25 & 26.

Public Participation None.

Closing Remarks: Miller thanked everyone for joining the call.

Closing Remarks: Notices Improvement Committee will meet on May 25th and 26th in Detroit, MI for a face to face meeting.



Notices Improvement Issue Committee

March 10, 2010

Teleconference

2:00 – 3:00 pm (EDT)

Program Owner

- Cesarano, Jim

Designated Federal Official

- Jenkins, Audrey, Acting, DFO

Committee Members Present

- Bernstein, Mark
- Boyle, Raymond
- Davis-Nozemack, Karie
- Holland, Richard
- Johnson, Frances
- McQuiston, Robert
- Miller, Ernest, Chair
- Murray, Alan
- Woodard, Norma, Vice Chair

Committee Members Absent

- Case, Ann
- Feng, Andrew
- Gambardella, Linda
- Head, Randee
- Kear, Lea
- Lee, Bradford

TAP Staff

- Babb, Rose
- Jenkins, Audrey
- Odom, Meredith

Welcome/Announcements

Miller welcomed everyone to the call.

Subcommittee Update

Subcommittee 1 – Raymond Boyle

No assignments at this time.

Subcommittee 2 – Alan Murray

The subcommittee completed the assignment of comparing the current Letter 4516 to the revised Letter 4516 using DAT Scoring. Letter 4516 is sent to a taxpayer who has a net operating loss carry back and received a tentative refund. The notice stated that upon further investigation, the taxpayer was not entitled to the refund and that the amount received would have to be paid back. The notice also stated that details were to be provided later. Neither the current or revised new notice specified the amount that will be paid back; it was provided in a subsequent mailing. The current notice started out with a citation of the code sections. The new notice omits those references of code sections and makes it easier to read. There was no big improvement over the current notice.

Subcommittee 3 – Norma Woodard

The subcommittee has not met but, they have an assignment. She will be making some adjustments to DAT Score for correspondex letters. In addition, she also mentioned that last week she had a



conference call with Cesarano, Jenkins, Murray, Boyle and Miller. Cesarano requested some work to be done on the proposed instructions that she presented at the Annual Meeting in December 2009. Woodard stated that she did some rewriting and received some additional information that she had requested. She will review that information and subsequently set up a subcommittee call.

Office Report – Audrey Y. Jenkins

It was discussed that the DAT Score training will be done by each individual subcommittee for new members but that Cesarano is available to give the training. Jenkins asked the committee if they would prefer Cesarano to give training to the new members. Miller stated he thinks Cesarano would be best to give the training to new members so that every one will have the same level of training. Jenkins will work with Cesarano on a training schedule that will accommodate new members.

2010 Assignment – Jim Cesarano

Received the new notices for DAT scoring. He will review them before passing it on. It is a little different from the standard review. He also stated that the notice startup project is finished. Cesarano will go through the scanned copies of the improved notices to ensure that they are sanitized of taxpayer's information. He will provide Jenkins with copies of the new notices for the committee to review. Boyle's subcommittee has accepted the assignment to review the DAT Score letters new style to see if it requires any new cells added. Jenkins will provide some samples to the sub committees. Each subcommittee will be given copies of both the old DAT Score letters and the New Style to make comparisons.

Miller mentioned that he would prefer that Boyle's subcommittee work this project. If it is too much work, then it can be shared with other subcommittee. Cesarano suggested that the material emailed to the committee for DAT Scoring be reviewed prior to training.

Public Participation

None

Closing Remarks: Next Teleconference will be April 14, 2010 at 2:00pm EDT.



Notice Improvement Committee Meeting
February 10, 2010
Teleconference
2:00 – 3:00 pm (EDT)

DFO cancelled the meeting due to weather related closure of the office. There were no members in attendance.