



**2011 Meeting Minutes  
Taxpayer Advocacy Panel (TAP)  
Taxpayer Assistance Centers (TAC) Committee**

- November 22, 2011
  - October 25, 2011
  - September 27, 2011
  - August 23, 2011
  - July 26, 2011
  - June 28, 2011
  - May 19 – May 21, 2011
  - April 26, 2011
  - March 22, 2011
  - February 22, 2011
  - January 25, 2011
- 

**Taxpayer Assistance Centers (TAC) Committee  
Teleconference Meeting Minutes  
Tuesday, November 22, 2011**

**Program Owners**

- |                 |                 |
|-----------------|-----------------|
| • Beth Braddock | Program Analyst |
| • Toni Horton   | Program Analyst |

**Committee Members Present**

- |                     |                  |        |
|---------------------|------------------|--------|
| • Acero, Antonio    | Myrtle Beach, SC | Member |
| • Baldwin, Barbara  | Auburn, CA       | Member |
| • Janci, Jerry      | Pittsboro, MS    | Member |
| • O'Neill, Patricia | San Jose, CA     | Member |
| • Palmer, George    | McLoud, OK       | Member |

**Committee Members Absent**

- |                     |                 |            |
|---------------------|-----------------|------------|
| • Bohrer, Herbert   | Springfield, ID | Chair      |
| • Cabusora, Haidee  | New York, NY    | Member     |
| • Eik, Nancy        | Missoula, MT    | Vice Chair |
| • Kosanovich, Matt  | Columbus, OH    | Member     |
| • McPeak, Catherine | Plano, TX       | Member     |
| • Smith, Toni       | Omaha, NE       | Member     |

**TAP Staff**

- |                 |               |         |
|-----------------|---------------|---------|
| • Gabriel, Lisa | Milwaukee, WI | Analyst |
| • Smiley, Ellen | Milwaukee, WI | Analyst |

## **Guest**

- Bartlett, Steven Analyst

## **Welcome/Announcements/Review Agenda**

Ellen Smiley welcomed everyone to the call.

## **Roll Call (Gabriel)**

Quorum not met.

## **Approval of Minutes**

Minutes approved.

## **TAC Project Committee Report 2011: Improving Access to Self-serve Forms and Publications at the TACs**

Smiley noted everyone in Taxpayer Advocacy Panel (TAP) will be getting a copy of the Taxpayer Assistance Center (TAC) Report once approved on the Joint Committee call.

### **Program Owner Comments (Braddock, Horton)**

Toni Horton expressed thanks to the committee for a really great job on the report, with all the time invested from the panel members. She added Barbara Baldwin did a fabulous job putting together the end product.

## **Office Update (Smiley)**

Smiley announced David Levine resigned due to family matters. Smiley expressed gratitude to the four panel members retiring from the panel this year: Herb Bohrer, Haidee Cabusora, Nancy Eik, and Patti O'Neill – we'll miss all of you. Thanks to everyone for your efforts on the TAC Report.

The project committee's name for 2012 is Face-to-Face Service Methods, instead of being called the TAC Committee.

Jerry Janci expressed appreciation to Smiley for her help and professionalism.

Smiley advised she emailed the panel members the call in numbers and agenda for the Joint Committee call this week when the TAC Project Referral will be reviewed. All panel members are welcome to call in.

## **Member Comments/Closing**

Smiley thanked everyone for being on the call and for the great year!

## **Meeting Adjourned**

**Annual Meeting in Washington DC, December 6 – 8, 2011**

**Taxpayer Assistance Centers (TAC) Committee  
Teleconference Meeting Minutes  
Tuesday, October 25, 2011**

**Program Owners**

- Beth Braddock Program Analyst
- Jane Brough Supervisor

**Committee Members Present**

- |                    |                  |        |
|--------------------|------------------|--------|
| • Acero, Antonio   | Myrtle Beach, SC | Member |
| • Baldwin, Barbara | Auburn, CA       | Member |
| • Bohrer, Herbert  | Springfield, ID  | Chair  |
| • Cabusora, Haidee | New York, NY     | Member |
| • Janci, Jerry     | Pittsboro, MS    | Member |
| • Levine, David    | Reno, NV         | Member |
| • Palmer, George   | McLoud, OK       | Member |
| • Smith, Toni      | Omaha, NE        | Member |

**Committee Members Absent**

- |                     |              |            |
|---------------------|--------------|------------|
| • Eik, Nancy        | Missoula, MT | Vice Chair |
| • Kosanovich, Matt  | Columbus, OH | Member     |
| • McPeak, Catherine | Plano, TX    | Member     |
| • O'Neill, Patricia | San Jose, CA | Member     |

**TAP Staff**

- |                 |               |           |
|-----------------|---------------|-----------|
| • Block, Roy    | Milwaukee, WI | Manager   |
| • Gabriel, Lisa | Milwaukee, WI | Analyst   |
| • Smiley, Ellen | Milwaukee, WI | Analyst   |
| • Annie Gold    | Milwaukee, WI | Secretary |

**Welcome/Announcements/Review Agenda (Bohrer)**

Herb Bohrer welcomed everyone to the meeting.

**Roll Call (Gold)**

Quorum met.

**Approval of Minutes (Bohrer)**

September minutes approved.

### **Approval of Final Draft 2011 TAC Report (Baldwin)**

Barbara Baldwin advised she found some minor corrections to make, but overall the report looks good. Bohrer asked if there were any substantial comments. Baldwin pointed out there was one comment on the cost factor, as it wasn't addressed in the report. Block suggested due to the fact it is the 12<sup>th</sup> hour, it might be too late to bring the cost into it. The committee held discussions on the various corrections to be made to font size, consistency when using apostrophes, headers, and punctuation. One item addressed was the reference to the committee as both the "TAC Committee" and the "TAC Project Committee". This needs to be consistent. It was agreed to list the name as the "Taxpayer Assistance Center (TAC) Project Committee (hereafter TAC Committee)" the first time it is mentioned in the executive summary and the first mention in the body of the report.

Bohrer said once the report is final, a copy will be sent to each of the Joint Committee members and put on the November Joint Committee call for review. Bohrer explained further distribution of the report will not occur until after approval by the Joint Committee. The report is approved with changes discussed. Congratulations to all.

### **Review Joint Committee Project Referral Form**

Approved

### **Program Owner Comments (Brough, Horton)**

Jane Brough shared her retirement date is October 28<sup>th</sup>. Tina D'eredita will be her replacement. She is on leave this week but will be returning on November 3<sup>rd</sup>. D'eredita is looking forward to meeting everyone in December at the Annual Meeting. Brough said it has been fun working with the TAC panel members and stated it was a pleasure working with Block and Smiley. Smiley and Bohrer gave special thanks to Brough for all her help.

### **Office Update (Block)**

Block said this has been another enjoyable assignment. The TAC Committee assignments these past few years have been valuable experiences. This is a good example of what TAP will be in the future. Congratulations to all on a job well done.

The staff is preparing for the annual meeting. They are working on the Bio book for the panel members, Toolkit for next year, and the Handbook all of which you will see at the annual meeting.

Bohrer expressed thanks to all the members of the committee. This is a good committee to be associated with and we have completed good work. The report will now go to the Joint Committee for review. If anyone is interested in attending the Joint Committee call, you are welcome to join in on the call. Bohrer asked Baldwin to participate on the call if possible. The next Joint Committee call is scheduled for Wednesday, November 23, 2011, at 1:00 central time. Smiley will send an email with the call in number and access code.



No committee assignments have been announced yet. If you request to return to your current committee you will have first consideration. The TAC Committee will have new leadership next year. Think about serving as Chair or Vice-chair.

Bohrer said we will have a call in November per the Federal Register. It should be a short call. Smiley said an electronic version of the final report will be sent to everyone for the November call and a hard copy will be provided at the annual meeting.

**Meeting Adjourned**

**Next Teleconference is Tuesday, November 22, 2011 at 2:00 pm CT**

**Taxpayer Assistance Centers (TAC) Committee  
Teleconference Meeting Minutes  
Tuesday, September 27, 2011**

**Program Owners**

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|--|--|
| <ul style="list-style-type: none"> <li>• Toni Horton</li> <li>• Beth Braddock</li> </ul> | <p>Program Analyst<br/>Program Analyst</p> |
|--|--|

**Committee Members Present**

- |  |   |  |
|--|---|--|
| <ul style="list-style-type: none"> <li>• Baldwin, Barbara</li> <li>• Bohrer, Herbert</li> <li>• Cabusora, Haidee</li> <li>• Eik, Nancy</li> <li>• Janci, Jerry</li> <li>• Levine, David</li> <li>• O'Neill, Patricia</li> <li>• Palmer, George</li> <li>• Smith, Toni</li> </ul> | <p>Auburn, CA<br/>Springfield, ID<br/>New York, NY<br/>Missoula, MT<br/>Pittsboro, MS<br/>Reno, NV<br/>San Jose, CA<br/>McCloud, OK<br/>Omaha, NE</p> | <p>Member<br/>Chair<br/>Member<br/>Vice Chair<br/>Member<br/>Member<br/>Member<br/>Member<br/>Member</p> |
|--|---|--|

**Committee Members Absent**

- |   |  |                                     |
|---|--|-------------------------------------|
| <ul style="list-style-type: none"> <li>• Acero, Antonio</li> <li>• Kosanovich, Matt</li> <li>• McPeak, Catherine</li> </ul> | <p>Myrtle Beach, SC<br/>Columbus, OH<br/>Plano, TX</p> | <p>Member<br/>Member<br/>Member</p> |
|---|--|-------------------------------------|

**TAP Staff**

- |  |  |  |
|--|--|--|
| <ul style="list-style-type: none"> <li>• Block, Roy</li> <li>• Gabriel, Lisa</li> <li>• Smiley, Ellen</li> <li>• Annie Gold</li> </ul> | <p>Milwaukee, WI<br/>Milwaukee, WI<br/>Milwaukee, WI<br/>Milwaukee, WI</p> | <p>Manager<br/>Analyst<br/>Analyst<br/>Secretary</p> |
|--|--|--|

**Welcome/Announcements/Review Agenda (Eik)**

Nancy Eik opened the meeting.

**Roll Call (Gold)**

Quorum met.

**Approval of Minutes (Eik)**

August minutes approved.

**TAC Report Introduction (Baldwin)**

Barbara Baldwin said she briefly went through the comments and asked if everyone would like to discuss them now or another time. Roy Block agreed right now would be a good time to discuss.

- Page 5: where the IRM is listed should also include IRM 21.3.4.9.
- Page 6: talks about the elderly not being computer savvy with the internet, however having broadband does not mean you do not have access to the internet. Jerry Janci sent in other wording we can work with it. Janci advised only 42 percent of Americans over age 65 go on line at all. Seniors are comfortable with familiar ways of doing things. Baldwin will go ahead and incorporate that. The committee discussed the fact that senior citizens will at some point stop requesting paper forms from the IRS.
- Page 7: where it talks about the cost. How much does this adds to the message? Unless we are going to recommend send out another post card, this is a mute point. It would be better to leave this out.

Herb Bohrer joined the call. Apologized for being late.

- Page 8: the information on multilingual assistance will be included.
- Page 9: how many postal workers made this comment? Baldwin said we do not want to make a decision on one or two complaints. Remove or alter this line of thought. Remove this sentence otherwise it may weaken our point.
- Page 11: mobile forms racks are another one of the core findings. Mobile racks are not outside of security. Smiley stated some places had them on racks but not mobile racks. They liked the mobile racks during the tax seasons. The mobile racks could be put outside of security. Bohrer said both points should be made. Placing the racks outside the security zone and still be placed in the building where building layout permits.
- Page 12: include the other IRM.
- Page 14: on the SFA taxpayers can request an account transcript and/or a tax return transcript, but they cannot check their account.
- Page 13: split the second recommendation in two. It includes two different recommendations. Recommendation 5, delete the later part of the recommendation.

Baldwin said she did not have a chance to go over the executive summary. She will go through it at a later date.

Block asked why we did not pick up on the bar coding process for the forms located within the TAC. Baldwin said she removed it wondering what was to be gained by it. Block explained there are a number of discretionary forms both in the Milwaukee and New York TACs. In this case it was a change of address form. In New York City, they had large boxes instead of racks. This must be an older location. They must have at least 4 thousand of these forms. They had been in place for so long they were turning yellow. TAC does a very good job at counting the forms being ordered. IRS needs to look at how many of them are actually being processed. The forms in VITA and even the banks, post office and library programs were marked with an acronym showing where the form came from. The IRS has gotten away from this practice but they need to revisit it.

Herb gave a special thank you to Baldwin for all the work she has put into the report.

#### **Administrative Meeting to Discuss any Changes for the Final Report (Bohrer)**

Bohrer said our goal is to approve the report at the October teleconference meeting. We will have an administrative call to review the draft report. Everyone's concurrence is needed for a date and time for the administrative call. Baldwin suggested October 13 at 1:00 EST, 12:00 CST, 11:00 ST, 10:00P ST.

**Action item:** Smiley she will provide an updated version of the draft with a reminder email for the administrative call.

#### **Report Cover Options**

Smiley asked if there were any suggestion on cover option. We can change the title to whatever you want. The executive summary will cover what is in the report. Smiley suggested everyone email her with their thoughts. The report is going out to all of TAP, Field assistance will post on their website and it will appear on TAP Space.

It was suggest that our TAC trademark be on the cover. It was voted on to have the green one with the wording on it. So it is written so it is done said Block. Green it is.

#### **Program owner comments (Horton)**

Toni Horton said she believes the report will be well received and thank you all for your time in trying to help improve our service. If there is anything else she can assist you with, everyone does know how to reach her.

#### **Office Updates (Block)**

Block said we are trying to bring projects to an end. Areas 4 and 5 were are wrapping up, Web page for comments and preparing for the Annual meeting.

#### **Meeting Adjourned**

**Next Teleconference is Tuesday, October 25, 2011 at 2:00 pm CT**



**Taxpayer Assistance Centers (TAC) Committee  
Teleconference Meeting Minutes  
Tuesday, August 23, 2011**

**Program Owners**

- |   |  |
|---|--|
| <ul style="list-style-type: none"> <li>• Beth Braddock</li> <li>• Jane Brough</li> <li>• Vicky Collins</li> </ul> | <ul style="list-style-type: none"> <li>Program Analyst</li> <li>Supervisor</li> <li>Tax Analyst</li> </ul> |
|---|--|

**Committee Members Present**

- |  |   |   |
|--|---|---|
| <ul style="list-style-type: none"> <li>• Baldwin, Barbara</li> <li>• Bohrer, Herbert</li> <li>• Cabusora, Haidee</li> <li>• Eik, Nancy</li> <li>• Levine, David</li> <li>• McPeak, Catherine</li> <li>• Palmer, George</li> <li>• Smith, Toni</li> </ul> | <ul style="list-style-type: none"> <li>Auburn, CA</li> <li>Springfield, ID</li> <li>New York, NY</li> <li>Missoula, MT</li> <li>Reno, NV</li> <li>Plano, TX</li> <li>McLoud, OK</li> <li>Omaha, NE</li> </ul> | <ul style="list-style-type: none"> <li>Member</li> <li>Chair</li> <li>Member</li> <li>Vice Chair</li> <li>Member</li> <li>Member</li> <li>Member</li> <li>Member</li> </ul> |
|--|---|---|

**Committee Members Absent**

- |   |   |  |
|---|---|--|
| <ul style="list-style-type: none"> <li>• Acero, Antonio</li> <li>• Janci, Jerry</li> <li>• Kosanovich, Matt</li> <li>• O'Neill, Patricia</li> </ul> | <ul style="list-style-type: none"> <li>Myrtle Beach, SC</li> <li>Pittsboro, MS</li> <li>Columbus, OH</li> <li>San Jose, CA</li> </ul> | <ul style="list-style-type: none"> <li>Member</li> <li>Member</li> <li>Member</li> <li>Member</li> </ul> |
|---|---|--|

**TAP Staff**

- |  |   |   |
|--|---|---|
| <ul style="list-style-type: none"> <li>• Block, Roy</li> <li>• Gabriel, Lisa</li> <li>• Robb, Patti</li> </ul> | <ul style="list-style-type: none"> <li>Milwaukee, WI</li> <li>Milwaukee, WI</li> <li>Milwaukee, WI</li> </ul> | <ul style="list-style-type: none"> <li>Manager</li> <li>Analyst</li> <li>Analyst</li> </ul> |
|--|---|---|

**Welcome/Announcements/Review Agenda (Eik)**

Nancy Eik will lead the meeting until Herb Bohrer joins. Eik welcomed everyone to the TAC Committee Meeting.

**Roll Call (Lisa Gabriel)**

Quorum met.

**Approval of Minutes (Eik)**

July minutes approved.

**TAC Report Introduction (Baldwin)**

Barbara Baldwin indicated she had submitted this file to the TAP TAC Analyst Ellen Smiley, who in turn made a couple of comments and Baldwin incorporated those suggestions into the report. Baldwin still needs the remaining sections from the rest of the subcommittees to ensure consistency for the report.

**Recommendation Subcommittees Current Activities and Next Actions:**

**Forms and Publication Distribution Through the TACs Can Be Improved (Smith)**

Toni Smith has not spoken to Matt Kosanovich since the last call. She is working on her portion of the write up. Roy Block asked Smith to send him what she has completed so far and he will work with her on this section.

Eik commented her local Post Office refused to offer any tax forms. Block indicated many Post Offices have opted out of the program and will not offer forms anymore. In addition, some Post Offices are will be closing or consolidating. Smith was thinking about IRS setting up a kiosk and ensures the paper is refilled. However, some of the offices are very small and may not have the room. Post Offices not having IRS forms will be part of the write up as the TACs are more important than ever in distributing forms.

**Some TAC Locations, Especially Those Within Federal Buildings, Hinder the Mission of Forms Distribution (Levine)**

David Levine added a few clarifications and back up examples to this section, which were requested last month. This document was emailed this morning as an additional pre-read. Baldwin indicated she reviewed this briefly. She requested Levine to put the actual locations in the report. It would not actually be listed in the report when it is printed but it would be good to have individual locations for back up as we need to be able to cite sources. Levine stated he actually heard this information at the TAC face-to-face meeting. Las Vegas and Los Angeles were two of the problem offices. Levine will incorporate changes and plans to get the report done by Friday.

**ACTION ITEM:** Block will research observation reviews to back up which TAC sites had long wait times through security or had signs displayed that need to be replaced.

**Elimination of Tax Packet Mailing and Late Legislation had an Impact on Taxpayers and TACs (O'Neill)**

Patti O'Neill was not on the call; However Lisa Gabriel did receive a report from O'Neill which was sent to Jerry Janci for his input.

**ACTION ITEM:** Gabriel to email subcommittee report to Herb Bohrer and Baldwin.

**Noteworthy Observations (Cabusora)**

Haidee Cabusora and has not had the chance to review Baldwin's comments on this section. Cabusora will review comments and will send to Baldwin and Catherine McPeak early next week. The final draft will be done for September. Baldwin will incorporate comments once received.

Bohrer is working on the Executive Summary and will forward it to Baldwin as soon as it is completed.

Bohrer stated according to the time line, the final draft should be done by the September conference call. All subcommittees need to forward their reports to Baldwin so she can pull the report together. Please copy Bohrer and Smiley when submitting reports or with any comments.

The report needs to be approved by the Joint Committee before the Annual Meeting in Washington D.C. in December. The final report takes time to put into one voice, so please provide ample time.

### **Program Owner Comments (Jane Brough/Toni Horton)**

Jane Brough invited Vicky Collins, who is the Forms Analyst, to the call. Collins read the reports written and one of the recommendations indicates to look at the order history. Collins explained each TAC does look at their order history to know what to order for the future. Each TAC completes a balance on hand survey to determine the amount left. If any TAC has a remaining stock of 25 percent or more, they have ordered too much. That data is used to determine what needs to be ordered for the next year.

Bohrer noted one of the TAC managers he spoke with did indicate they do order forms and publications based on last year's usage.

### **Office Updates (Roy Block)**

The office is busy with the TAP Restructure as well as preparing for the Annual Meeting. This office worked on an Outreach Lesson which will be presented at the Annual Meeting. Our Communication Committee has been updating the Bio Book, Outreach Toolkit, and Handbook.

### **Member Comments/Closing**

Bohrer thanked Eik for leading the meeting until he was able to join the call. He appreciates the efforts of the panel members on this committee and asked the panel members to support Baldwin with any help she needs. Also, feel free to contact Block or Smiley with any questions.

### **Meeting Adjourned**

**Next Teleconference is Tuesday, September 27, 2011 at 2:00 pm CT**

**Taxpayer Assistance Center (TAC) Committee  
Monthly Meeting Minutes  
Tuesday, July 26, 2011**

**Program Owners**

- |                 |                |
|-----------------|----------------|
| • Jane Brough   | Supervisor     |
| • Toni Horton   | Tax Analyst    |
| • Beth Braddock | Policy Analyst |
| • Vicki Collins | Tax Analyst    |

**Committee Members Present**

- |                     |                  |            |
|---------------------|------------------|------------|
| • Acero, Antonio    | Myrtle Beach, SC | Member     |
| • Baldwin, Barbara  | Auburn, CA       | Member     |
| • Bohrer, Herbert   | Springfield, ID  | Chair      |
| • Cabusora, Haidee  | New York, NY     | Member     |
| • Eik, Nancy        | Missoula, MT     | Vice Chair |
| • Janci, Jerry      | Pittsboro, MS    | Member     |
| • Levine, David     | Reno, NV         | Member     |
| • McPeak, Catherine | Plano, TX        | Member     |
| • Palmer, George    | McLoud, OK       | Member     |
| • Smith, Toni       | Omaha, NE        | Member     |

**Committee Members Absent**

- |                     |              |        |
|---------------------|--------------|--------|
| • Kosanovich, Matt  | Columbus, OH | Member |
| • O'Neill, Patricia | San Jose, CA | Member |

**TAP Staff**

- |                 |               |                 |
|-----------------|---------------|-----------------|
| • Smiley, Ellen | Milwaukee, WI | Program Analyst |
| • Gabriel, Lisa | Milwaukee, WI | Analyst         |
| • Annie Gold    | Milwaukee, WI | Secretary       |

**Welcome/Announcements/Review Agenda – Herb Bohrer**

Herb Bohrer welcomed the panel members to the meeting. He is participating in the Joint Committee meeting in Seattle this week. The TAP Chairs and staff are working on the new TAP direction for the future. Everyone is encouraged to be on their August Area call as the TAP leadership team will be providing an update on the Joint Committee decisions.

**June Meeting Minutes Approval – Herb Bohrer**

Minutes Approved.

## **Recommendation subcommittees Current Activities and Next Actions**

- **Forms and Publication Distribution Through the TACs Can be Improved** ([Matt Kosanovich](#), [Toni Smith](#), and [Tony Acero](#))  
Matt Kosanovich emailed Ellen Smiley to advise he will touch base with Toni Smith and Tony Acero next week.
- **Some TAC Locations, Especially Those Within Federal Buildings, Hinder the Mission of Forms Distribution** ([David Levine](#) and [George Palmer](#))  
David Levine explained the report is complete but they are working on getting it into the right format for Barbara Baldwin. Baldwin advised the topic sentence is there but more detailed information on the locations where this occurred would be helpful. Levine will include this information with each of the headings.
- **Elimination of Tax Packet Mailing and Late Legislation had an Impact on Taxpayers and TACs** ([Patti O’Neill](#) and [Jerry Janci](#))  
Patti O’Neil is also attending the Joint Committee this week. The subcommittee will complete their draft report for next month.
- **Noteworthy Observations** ([Haidee Cabusora](#) and [Catherine McPeak](#))  
Haidee Cabusora advised Catherine McPeak worked with her last week to complete their first draft. The recommendations have been outlined including mobile racks, order quantities based on history, model TACs, and facilitated self-assistance. Work will continue on the draft. Help with the model TAC would be appreciated. Smiley advised the Model TAC Guide is on TAPSpace, in the folder titled additional information from the face-to-face meeting. It is broken down into four parts, as it is too large to post as one document. Jane Brough advised TAC managers do not interact with congressional staffers. Brough explained we have Government Liaisons and Disclosure in each state that contacts the Congressional Offices and provides TAC messages. This might be reinforced within the organization. Brough will email information to Cabusora and McPeak.

Cabusora had questions about the order of information or where the observations should be. Bohrer said the subcommittees develop the recommendations and rationale and Baldwin will move them around.

## **Review of TAC Report Timeline**

Smiley provided the following:

- June and July 2011 the subcommittees will set up time to discuss, work and complete their issue. Provide updates on monthly calls.
- August 2011 have issues and recommendations with rational sections completed and submit your section for all to review. Subcommittee chairs please email these completed write ups to Smiley, who will distribute to the committee for review.
- August 23, 2011 monthly TAC call to discuss any changes to the issue sections.

- September 27, 2011 monthly TAC call to review the final draft of the complete report.
- October 25, 2011 monthly TAC call for approval of the final report.
- November 23, 2011 final Report presented to the Joint Committee on Joint Committee monthly teleconference.

Bohrer will write an executive summary once the first draft is completed. If any subcommittee needs a conference call to discuss their section, please contact Smiley to set up a date and time.

Smiley verified with Baldwin to include the introduction section with the pre-reads for next month's call.

Bohrer expressed appreciation to all for participating on this call. This project committee has spent a lot of time talking about TACs and working the issues. The program owners are really receptive to our suggestions and are really involved with the project.

#### **Office Update**

Roy Block is at the Joint Committee meeting in Seattle this week.

#### **Public Input**

None

#### **Meeting Assessment / Closing**

**Next Teleconference is Tuesday, August 23, 2011 at 2:00 pm CT**

## Taxpayer Assistance Center (TAC) Committee Monthly Meeting Minutes Tuesday, June 28, 2011

### Program Owners

- |                 |                 |
|-----------------|-----------------|
| • Jane Brough   | Supervisor      |
| • Toni Horton   | Tax Analyst     |
| • Beth Braddock | Policy Analyst  |
| • Portia Jones  | Program Analyst |

### Committee Members Present

- |                     |                  |        |
|---------------------|------------------|--------|
| • Acero, Antonio    | Myrtle Beach, SC | Member |
| • Baldwin, Barbara  | Auburn, CA       | Member |
| • Bohrer, Herbert   | Springfield, ID  | Chair  |
| • Cabusora, Haidee  | New York, NY     | Member |
| • Janci, Jerry      | Pittsboro, MS    | Member |
| • Levine, David     | Reno, NV         | Member |
| • O'Neill, Patricia | San Jose, CA     | Member |
| • Palmer, George    | McLoud, OK       | Member |
| • Smith, Toni       | Omaha, NE        | Member |

### Committee Members Absent

- |                     |              |            |
|---------------------|--------------|------------|
| • Eik, Nancy        | Missoula, MT | Vice Chair |
| • Kosanovich, Matt  | Columbus, OH | Member     |
| • McPeak, Catherine | Plano, TX    | Member     |

### TAP Staff

- |                 |               |                 |
|-----------------|---------------|-----------------|
| • Smiley, Ellen | Milwaukee, WI | Program Analyst |
| • Gabriel, Lisa | Milwaukee, WI | Analyst         |
| • Annie Gold    | Milwaukee, WI | Secretary       |

### Welcome/Announcements/Review Agenda (Herb Bohrer)

Herb Bohrer welcomed everyone and asked if there were any changes needed to the agenda. Bohr thanked everyone for being at the face-to-face meeting. It was a successful meeting and he appreciates the members participating and working together.

### May Face-to-Face Meeting Minutes Approval (Herb Bohrer)

Minutes Approved.

## **Recommendation Subcommittees Current Activities and Next Action:**

- **Forms and Publication Distribution Through the TACs Can be Improved (Matt Kosanovich and Toni Smith)**

Toni Smith stated she and Matt Kosanovich are working the issues separately and then will combine the information. They are coming together with the information they both have to prevent any overlapping of work.

The objective is to make it easier for the taxpayers. They are familiarizing themselves with any procedures already in place for possible changes so when taxpayers come into the TAC they will not have to stand in long lines or wait for a long period of time.

- **Some TAC Locations, Especially Those Within Federal Buildings, Hinder the Mission of Forms distribution (David Levine and George Palmer)**

David Levine stated the subcommittee is working on the outline of the report. He received information from Toni Horton and will incorporate it into the report before obtaining additional input from George Palmer. Levine will contact Barbara Baldwin with information.

- **Elimination of Tax Packet Mailing and Late Legislation had an Impact on Taxpayers and TACs (Patti O'Neill and Jerry Janci)**

Patti O'Neill said she and Jerry Janci are working on the outline and write up. They will connect next week to revise and should have a finished product within two weeks.

- **Noteworthy Observations (Haidee Cabusora and Catherine McPeak)**

Haidee Cabusora advised she is working on the outline. She will reorder the six observations for better flow and incorporate additional information received before having Catherine McPeak review and revise.

Baldwin is ready to start putting the report together once the information is received from the members. Smiley suggested Baldwin look at the last year's report for format on the introduction, background, purpose, etc. Bohrer will complete the Executive Summary and transmittal letter. Smiley advised she is available for assistance.

Bohrer stated how pleased he is with all the work everyone is committed to doing.

### **Review of TAC Report Timeline**

Smiley gave an overview of the timeline. Subcommittees will continue to work on their sections during July and provide updates on monthly calls. Submit completed recommendations with rational sections to Smiley for distribution to all members as pre-reads prior to the August meeting. Discuss any changes to these sections on the August call. In September review the final draft and October approve the final report. The final report will be submitted to the Joint Committee in November.

### **Program Owner Comments (Toni Horton/Jane Brough)**

There are no updates at this time.



### **Office Update**

Smiley noted Tony Acero is not assigned to a subcommittee. Tony Acero will join Kosanovich and Smith to work on the section titled Forms and Publication Distribution Through the TACs Can be Improved.

Smiley pointed out if any subcommittee would like to use the conference call in number to discuss their sections they are welcome to do so. Please let her know when scheduling a subcommittee call to ensure no overlapping of calls.

Bohrer stated he will be attending the Joint Committee face-to-face meeting in July. The meeting will cover the TAP Refocus and how the organization will operate. There is a survey out and Bohrer would like everyone to complete it. Smith will send it to Smiley who will forward a copy on to the TAC Committee. Please return the completed survey to Smiley.

Levine asked Acero if he would review their section of the recommendations to have a fresh view point. Acero agreed and Levine will email it to him. Acero would like to view the Charleston TAC to compare the layout with Myrtle Beach. Bohrer stated there is no problem with additional TAC visits.

### **Public Input**

None

### **Meeting Assessment / Closing**

**Next Teleconference is Tuesday, July 26, 2010 at 2:00 pm CT**



### **Program Owner Opening Comments/Review of Assignment (Jane Brough/Toni Horton)**

Jane Brough stated she was pleasantly surprised to read in the panel members observations that the forms racks were stocked and that most forms were available. In reading the observations, two sites visited had Facilitated Self Assistance (FSA) but one was not properly staffed. These observations are taken seriously. TAC management's intention is to review the staffing and determine why they didn't have someone available to assist the taxpayers, as well as reasons why FSAs are not used.

The Treasury Inspector General for Tax Administration (TIGTA) report will be released soon and in the report it basically states the FSAs are not being offered. Brough likes the idea of mobile forms racks. As far as TAC structure and locations, it's on their list to make changes, however the budget has been cut for real estate, and only a few sites will be moved or upgraded. However, none of the TACs are being eliminated.

Toni Horton provided a power point presentation to give the committee an idea of the mission of Field Assistance / TAC. The presentation included information on the Field Assistance structure, definition of a TAC, key services, amount of taxpayers served, TAC staffing, technology portfolio, and accomplishments.

Brough stated TACs will stay open until all taxpayers are helped even if they are scheduled to close at 4:30 p.m. However, TIGTA reported one office did close their doors an hour early due to people traffic.

### **Observation Review (Observation Booklet Provided)**

- Haidee Cabusora spoke of her observation in downtown Manhattan, New York. She noted there were newer racks and they were well stocked. They do not have a kiosk. The employees like to help, but it depends on the amount of customer to employee ratio for the day.
- Matt Kosanovich visited three TACs in Ohio: one in Columbus, one in downtown Cincinnati, and one in West Chester.

At the Columbus TAC, parking is an issue as well as the line going through security. This site is not user friendly for customer's who are trying to access it. The forms rack looked new and was neatly stacked, well stocked, and labeled. This site did not have local or state forms. When forms need to be ordered, the office does a review of last years order and current year's usage. All the employees took part in stocking the forms. The waiting area for this TAC is at the front of the office, but the kiosk is down a hallway. Customers would not know there was a kiosk without having assistance.

In the downtown Cincinnati TAC there is a massive directory when you first walk in. The directory did not list the Taxpayer Assistance Center but it did list the IRS. You must go through security at this building, but they were helpful in pointing out where to go. There was a kiosk in the outer hallway but it wasn't a FSA. Brough indicated it was a forms kiosk. The TAC staff did not have a group manager and ran out of forms early in the filing season. But there were plenty of forms available at this time, including W-2s and 1099s. This TAC was consistent with the Columbus TAC.

The West Chester TAC was easy to get to and park. Signage in this office was the best out of the three TAC offices observed. This is a smaller TAC and the group manager floats between two TACs. The forms rack shelves were very thin and only had a couple of racks. The receptionist did mention many taxpayers have asked about envelopes and labels and noted there were more comments about that than the fact forms were not being mailed out. This TAC actively used Publication 4893, which is a brochure titled, "Important Information for Taxpayers Who No Longer Receive Tax Packages."

- Toni Smith visited the Omaha, Nebraska TAC and the Nashville, Tennessee TAC.

Smith visited the TAC office in Omaha, Nebraska shortly after the Annual meeting in December, just to have a quick overview. This TAC is in a new location. There is meter parking or garage parking. At the new location you must go through security. Once through the security checkpoint the TAC is right there and is well labeled. W-2s and 1099s were accessible in boxes and the form racks were well labeled and in order. TAC staff would only print up to a certain number of pages of forms, instructions, or publications. If the document was a lengthy document, the staff would tell customers to call the Tax Forms and Publications toll free number. Ordered forms were received in a timely matter. The forms racks were still fully stocked even after tax season.

The Nashville, Tennessee TAC had basically received the majority of the forms, but were waiting on forms such as W-2s and 1099s. Smith was not familiar with the area and did not know which way to go in. Customers have to walk past the waiting area to get to front desk. There is a Forms Coordinator on site who was responsible for ordering and stocking the forms. If a customer needed a certain form that was not in, the TAC staff would direct the customer to the website. This TAC office received the publications they needed at the end of tax season instead of during tax season.

- Catherine McPeak visited the TAC in Farmers Branch, Texas. The TAC is on the first floor of the building. She had to leave her driver's license with security when she entered the building. She observed 39 forms racks were empty. Touch screens were initially being set up or were being maintained. The printers would only print up to 50 pages and the employees barely had enough time to help customers with the kiosk. This TAC did have a designated Forms Coordinator, however the other employees are familiar with these items and do stock in addition to the forms coordinator. At the Farmer's Branch TAC they did offer tax preparation if the Adjusted Gross Income (AGI) was under \$49,000. It has been observed that tax practitioners come into the office at the last minute and bring in multiple boxes of tax returns. Overall the TAC was orderly. McPeak also stopped by a library and noted they had minimal forms and the United States Postal Service (USPS) didn't have any forms.

Brough added banks have decided against having tax forms. Ellen Smiley provided a handout to the panel members regarding the Tax Forms Outlet Program (TFOP).

- Barbara Baldwin visited the following TACs in California: Sacramento, Fresno, Los Angeles, and Modesto.

The building for the Sacramento TAC was difficult to find. It was located in the back of a big parking lot, which did allow for plenty of parking. There is a security guard who screens all the customers going into the TAC. His job is also to announce to the customers every ten minutes if they only needed forms they could proceed to the forms racks and bypass the line to ask questions. The forms rack was along one long wall and was 20% empty, which happen to be the forms affected by legislative changes. Baldwin did ask the TAC manager about having a forms rack outside the TAC office and the manager noted it would be a moot point since the building is locked outside of operating hours. This office is based on the old TAC Model, but will be updated to the new TAC Model in a few months. Baldwin indicated that none of the four TACs she visited had any kind of problem keeping up with the demand of forms.

The Fresno TAC was located in the middle of the government section of town. The building was a little hard to find and there is no free parking available. There is security when entering the building and then customers are screened by a greeter in the TAC. The forms racks were well stocked. When asked about having a forms rack outside the TAC office, the response was the building is locked outside the TAC hours.

The Los Angeles TAC is located in the center of town and difficult to get to. Parking is a minimum of \$6 for half a day. Once inside the building there was a long line going through security. Customers are able to follow the signs to IRS, but it didn't specify anything for TAC. The Los Angeles TAC does have a FSA which the manager was pleased with and provided a demonstration. This TAC does put a forms rack out in the lobby. The TAC manager also put in a request to expand the hallway by six feet to make it easier for taxpayers to get to the forms rack.

The Modesto TAC was easy to get to and the racks were well stocked. This TAC provided pamphlets which instructed taxpayers how to get forms if they were not on the racks. In this TAC the building closes after hours so there is no need to have a forms rack outside of the TAC Office. The manager of this TAC also manages the TACs in Stockton and Walnut Creek. The Walnut Creek TAC seemed to get quite a few complaints regarding the non receipt of tax packages.

- Patti O'Neill visited the San Jose and Oakland, California TACs. Both TACs have heard a significant amount of comments regarding the non receipt of tax packages. Most of the comments were expressed by the elderly.

In the Oakland TAC there is a rotunda in the building and they are allowed to put a forms rack there during the filing season. There isn't an employee out there to police how many forms are taken. This TAC was upgraded from the old model to the new model and there were more customers due to forms not being mailed out.

At the San Jose TAC the parking was difficult and the office itself was being remodeled. It's located in an older building, and since the TAC was being remodeled they were able to obtain space on the first floor to put out tables and have boxes with forms on the tables.

### **Highlights of Prior Reviews**

Jerry Janci stated all the TACs he observed seemed to have had all their forms.

Dave Levine was impressed with the Reno, Nevada TAC, and noted the one concern was they didn't open until 8:30 a.m. It would be helpful if they could open the outside doors to let people in and leave the inside doors locked until the office opened. He also stated the Las Vegas, Nevada TAC was an excellent office, however there is no way to get there with public transportation. He cannot understand why the TAC office was put in the location it now sits, as it is totally inaccessible to a taxpayer trying to get forms.

Bohrer noted in the Boise, Idaho TAC there were a few forms which they were low on, but in the Pocatello, Idaho TAC the racks were full. The Boise forms area is a separate room from the TAC itself. Bohrer asked one customer "How do you know which forms you need to take?" The customer responded that she did not know. At this TAC if a customer goes to the greeter, the greeter will tell them what forms they may need. The Pocatello TAC displayed Publication 4893, which explains what forms you may need.

### **Observation Matrix (Baldwin)**

A matrix created by Baldwin was handed out to the panel members. She explained the matrix is to provide a quick overview of the observations and help pin point patterns. It was pointed out the adequate supply of forms was a 'yes' across the board. The matrix is set up with the TAC cities across the top and the questions down the left side.

### **Development of Findings and Recommendations (Bohrer)**

This step requires the committee to look for findings and conclusions based on the TAC observations.

Brough commented we need to be advocates and advise Congress that forms need to be approved before January 1<sup>st</sup>.

### **Clarify Issues / Identify Observations / Identify Concerns (Bohrer)**

The following Observations were identified

- Process used in TACs
- Availability of Forms
- Form Distribution in TACs
- Limited Distribution
- Quantity of Forms Ordered
- Physical Location of TACs

- Impact of IRS's Decision to Eliminate Mailing Tax Packages
- Prior Year Forms
- Alternative Distribution Centers
- Noteworthy Observations

## **Recommendations with Rationale (Bohrer)**

### **A. Form distribution in TACs are a vital function and needs to continue.**

There are only 401 TACs in the country. The TACs are not the only way to get forms, however when all else fails taxpayers will drive any distance to get a form, because they need it.

#### Areas of Interest:

##### 1. Prior Year Forms

- Question: Are prior year forms stocked?  
Answer: According to IRM 21.3.4.27 when there are space limitations, prior year Filing Season products will not be stocked in TAC offices. Per Brough, the usage of Facilitated Self Assistance (FSA) tripled from last year.
- Question: Who makes the decision of how the space of each TAC is used?  
Answer: Per Brough, the Territory Manager has the signature authority on the blueprint when a TAC relocates. The TACs that have been stationary for some time can write a ticket for alterations as long as there is no cost. The blueprint is called Authorization Staffing Plan (ASP).

##### 2. Alternative Distribution Centers other than TACs

Note: Alternate sites such as libraries, post offices, banks, churches and other sites should participate in providing tax forms. Media and Publications run the distribution centers, and so far only banks and post office that are currently enrolled get these forms mailed. The current program Tax Forms Outlet Program (TFOP) is not open for new membership per Smiley. Per Block, it was a dying program because IRS was leaning toward electronic filing.

##### 3. Distribution Limited

Note: Is there evidence of abuse on the amount of forms being taken? There is speculation practitioners are taking a significant amount of forms and the opinion on this is because they wait until the last minute and are not prepared. It was indicated we are using the word practitioner loosely, as licensed professional are generally not the ones taking these forms.

One suggestion was to have practitioners provide their PTINs, however there is a concern about the perception of 'Big Brother'. It was questioned if the TACs are limiting the amount of forms taken because they could run out? Brough indicated we would be doing a disservice if we limit the amount of 1099 forms taken. Herb Bohrer

indicated perhaps the employees have it in their mind to control the amount of forms taken.

**B. Physical location of TACs can be a barrier.**

It should be easy to get a tax form. Some obstacles are finding a place to park and going through security. There is a difference between federal buildings and non-federal buildings. Brough indicated the determination to have a guard in the TAC has to do with the threats that have occurred, such as physical and verbal attacks. Please see IRM 1.4.11.4.1 to 1.4.11.4.3 for security.

George Palmer advised tax forms being provided or not in post offices has to do with IRS sending a post card to the Post Master asking for the amount of forms needed. Only one person in the post office would get this post card, and they are very busy and may not have responded. Then they are removed from the mailing.

**C. Impact of IRS's decision to eliminate the mailing of tax packages**

The post cards mailed to taxpayers advising of this information was not very effective. Per the matrix created by Baldwin, the majority of TACs were not affected by this. President Obama's budget plan was the directive for IRS to reduce the cost of publishing and postage by \$26 million. Is there another way to inform taxpayers of all the ways to obtain forms? Haidee Cabusora suggested having a forms kiosk at state government buildings. It's frustrating to a taxpayer to have to go to two tax sites to get forms. If the taxpayer goes to one site to get all the state and federal forms they need, then it would save the taxpayer time. Availability of forms was a problem at the beginning of the year.

**D. Noteworthy observations**

1. Have mobile form racks
2. Encourage the marketing and utilization of FSA's
3. Customer Service
4. Congressional Staffer Interaction
5. Process used in the TACs has generally been in compliance with the IRM, as the supervisor and employees are aware of the requirements and the procedures work.
6. Quantity of Forms Ordered - based on history

Brough stated TACs place their orders in July. Upper management decided to increase every order by ten percent across the board. TACs do count the amount of forms taken each year. The order amount for the next year is based on how many forms the TAC distributed. It's more cost effective to order the forms the first time. To order forms a second round costs more. The reprint of forms is expensive. The only time there is a hold on the amount of forms a TAC orders is if the order is doubled what they have ordered in the past. Brough said they can tell you how much each TAC ordered for the past three years. Field Assistance looks at the balance on hand at the



end of the year. Catherine McPeak indicated IRS should know who used paper forms in the past and that is who the tax packages should be sent to. Block advised this is how it was done in the past.

### **Program Owner Comments (Jane Brough / Toni Horton)**

Brough presented a power point containing information regarding Internal Revenue Manual (IRM) 21.3.4.9 dated 10-01-2010, titled Taxpayer Forms, Instructions, and Publications Request. She also spoke of the TIGTA Audit which concluded in February and drew the panel to page two of the report under “What TIGTA Recommends,” it reads, “A strategy should be developed to ensure that publishing and mail costs are continually evaluated. The strategy should include goals and measures as well as steps to monitor the effect.” Brough also spoke of two programs, Community Based Outlet Program (CBOP) as well as Tax Form Outlet Program (TFOP).

**ACTION ITEM: Smiley to send out to Panel members via email IRM 21.3.4.9 and TIGTA Audit Reports.**

**ACTION ITEM: Smiley to find out what research was conducted regarding TIGTA Recommendation #2.**

### **Next Steps (Bohrer)**

- **Formation of Subcommittees**

- A: Matt Kosanovich (lead) and Toni Smith
- B: David Levine (lead) and George Palmer
- C: Patti O’Neill (lead) and Jerry Janci
- D: Haidee Cabasora (lead) and Catherine McPeak

- **Writing Report – Report Format**

Discussion of the report format took place. Baldwin will be the TAC Committee’s report writer, combining the sections to sound as one voice.

- **Tasks**

Subcommittees will set up time to discuss, work, and complete their recommendation with rationale section. These sections will be discussed on the monthly teleconference for the next few months.

- **Review/Update/Deadline**

The final draft should be completed by September 27<sup>th</sup> which is when it will be reviewed on the TAC Committee teleconference call. Final Report presented to Joint Committee in November.

### **Subcommittee Breakout**

- **Organize**
- **Begin Work on Specific Issues**

It is suggested when the subcommittees are writing up their portion of the report to think in terms of issue statement, back ground and conclusions. Once we get to the first stage of the rough draft we will have Baldwin bring it together so it looks like the entire report comes from the same person.

### **Subcommittee Update on Progress**

Bohrer requested Baldwin to have a topic sentence at the beginning of each section. Committee members are to email Smiley their section when completed for review on the monthly calls.

### **Meeting Assessment / Closing**

**Next Teleconference is Tuesday, June 28, 2010 at 2:00 pm CT**

**Taxpayer Assistance Center (TAC) Committee  
Meeting Minutes  
Tuesday, April 26, 2011**

**Program Owners**

- Toni Horton Tax Analyst
- Beth Braddock Program Analyst

**Committee Members Present**

- |                     |                  |            |
|---------------------|------------------|------------|
| • Acero, Antonio    | Myrtle Beach, SC | Member     |
| • Baldwin, Barbara  | Auburn, CA       | Member     |
| • Bohrer, Herbert   | Springfield, ID  | Chair      |
| • Cabusora, Haidee  | New York, NY     | Member     |
| • Eik, Nancy        | Missoula, MT     | Vice Chair |
| • Janci, Jerry      | Pittsboro, MS    | Member     |
| • Kosanovich, Matt  | Columbus, OH     | Member     |
| • Levine, David     | Reno, NV         | Member     |
| • O'Neill, Patricia | San Jose, CA     | Member     |
| • Palmer, George    | McCloud, OK      | Member     |
| • Smith, Toni       | Omaha, NE        | Member     |

**Committee Members Absent**

- |                     |           |        |
|---------------------|-----------|--------|
| • McPeak, Catherine | Plano, TX | Member |
|---------------------|-----------|--------|

**TAP Staff**

- |                 |               |                 |
|-----------------|---------------|-----------------|
| • Block, Roy    | Milwaukee, WI | Manager         |
| • Smiley, Ellen | Milwaukee, WI | Program Analyst |
| • Gabriel, Lisa | Milwaukee, WI | Program Analyst |
| • Gold, Annie   | Milwaukee, WI | Secretary       |

**Welcome/Announcements/Review Agenda (Bohrer)**

Herb Bohrer welcomed everyone.

**Roll Call (Gold)**

Quorum met.

**Approval of Minutes (Bohrer)**

March, 2011 minutes approved.

## TAC Visits

- **Observation Reviews**

- **Los Angeles, CA (Barbara Baldwin)**

Barbara Baldwin visited the Los Angeles TAC, on March 22<sup>nd</sup>. She observed how difficult it was to park and get to the TAC. The TAC is located in a large building and there was a long line to get into the office. It is like going through a maze to get there as it is located in a corner around another corner. The practice is to help yourself to forms without standing in line. There are several computer cubicles that have access to [www.irs.gov](http://www.irs.gov). Someone who is not used to using a computer wouldn't be comfortable using these computers. Taxpayers can print out forms, publications, and tax transcripts from the computers. The manager would like taxpayers to be able to print only the pages needed instead of the total document. This is costly and not time effective. To obtain the printed information from the reception desk, you need to show identification. In addition, the manager thought expanding the waiting area another six feet would be helpful due to the numerous participants and the office being so small. A seasonal forms clerk would be helpful. Forms are restocked twice a day. During tax season, the manager will move the tax forms out into the lobby of the building for convenience.

- **Reno & Las Vegas, NV (David Levine)**

David Levine reported he makes regular visits to the Reno TAC and stated it is an excellent facility. The place is clean and well stocked. There are no print stations. To find the location is rather difficult and there is no assistance from the security personnel.

The Las Vegas TAC is a beautiful facility. Staff is very knowledgeable and there are multilingual personnel available. The manager was very helpful. Parking is six dollars for fifteen minutes and is not accessible without a car. It is easier to walk from the Nugget Hotel where the parking is free. The TAC is located in downtown Las Vegas or sometimes called Old Town. There is no public transportation. It is located outside of the city and people without cars have no way of getting there unless they walk. They have a rack filled with forms that is located in the lobby. Security is the same in most offices. Ellen Smiley added having the security officer inside the TAC was the result of the Austin tragedy. A plane flew into the Austin campus and the President raised the security level.

- **Gulfport, Clarksdale, & Tupelo, MS (Jerry Janci)**

Jerry Janci reported the Clarksdale TAC office is open four hours one day a week. The TAC office is located on the 3<sup>rd</sup> floor of the building. Forms were on racks in the waiting room. No Federal tax returns are prepared in this office. There was only one employee with the manager located around the corner. The manager explained most taxpayers know what form they need based on the color of the form they used in previous years. No empty racks were observed. The taxpayers are satisfied with the service they receive. This is a poor area. There is no charge for parking. The office has easy access and serves the public very quickly.

The Gulfport TAC is located in a dedicated IRS building. The building is only five years old. There is a security guard in the office. There are three IRS employees working there. The forms are on the racks, but the space is small. The manager commented room availability determines how many forms are placed on the racks. There are twenty seats in the office area. They do prepare Federal and State tax returns. Most all tax forms are available. They are monitored but not limited on the number of forms the taxpayers can take. Many elderly people do not have and do not want a computer. Instead, they will go to the TAC office to get forms.

The Tupelo TAC office is located in the brand new section downtown. There is no problem with parking on the street. They have arrows at the door showing the direction for forms. There was no manager on site due to the death of the manager's father. They do have security on site. Federal and State tax return are prepared in this office. It was mentioned the Publication 17, Form 1040, and 1099 are high in demand. There were no survey forms in the area. The biggest problem for taxpayers seems to be the non-mailing of tax packages this year and finding out where the TAC offices are located.

Publication 4893 was available in the Gulfport office. An overview of the pub was shared with the committee. There is a lot of good information in this publication. Bohrer stated the form was not available in two of the TACs he visited. The pub is not readily available in all TAC offices but it should be.

**Action item:** Smiley will find out background information on this pub.

- **Oklahoma City, OK (George Palmer)**

TAC office is in a bad location. Free parking is over 6 blocks away and when things are busy downtown there is no place to park. Taxpayers should not have to show identification to pick up a form or walk a long distance to get to the TAC office. Taxpayers have to go through a metal scanner to get the forms they may need. All the forms were available. It was observed none of the Post Offices have forms. The majority of panel members agree the Post Offices do not have tax forms available.

### **Identify common observations and Concerns (Bohrer)**

During the Face-to-Face we will try to formulate the common observations and the ones we want to discuss in more detail. Barbara Baldwin volunteered to prepare a matrix on the observations and email a copy to the committee prior to the meeting.

Smiley asked everyone to submit their reports to her by May 10<sup>th</sup>, or the 11<sup>th</sup> the latest. This will give her time to make copies and have them available at the face-to-face meeting.

## **Next Steps**

- **What to expect at the Face-to-Face (Bohrer)**

The meeting will start on Thursday, May 19<sup>th</sup> at 1:00 pm; we'll meet 8:00 am to 5:00 pm Friday, May 20<sup>th</sup>; and finish on Saturday, May 21<sup>st</sup> 8:00 am to noon. We will review the observations Thursday, discuss findings and observations on Friday, and break out into subcommittees on Saturday to start work on the written report. Dinner plans were discussed and reservations will be made.

The Hotel information is:

San Diego Marriott Gaslamp Quarter  
660 "K" Street  
San Diego, CA 92101  
(619) 696-0234

The hotel does not have free internet access in the rooms; however there is free access in the lobby and business center.

## **Program Owner Comments (Toni Horton/Beth Braddock)**

No comments at this time.

## **Office Updates (Roy Block)**

Thanks to everyone who have completed their TAC visits and provided their observation review. There is a new SATO telephone number to use if you encounter problems when traveling: 1-866-671-2253 option 3.

May 2 – 5 , 2011 the Communication Committee will be at their face-to-face meeting so Roy Block, Annie Gold, and Patti Robb will not be in the office. If anyone needs anything during that time, please contact Ellen Smiley or Lisa Gabriel

## **Member Comments/Closing (Bohrer)**

Thanks to everyone for their good reviews and observations during their TAC visits. We are coming up with good findings.

## **Meeting Adjourned**

**Next Meeting is Face-to-Face Meeting in San Diego May 19 – 21, 2011**



George Palmer provided written observations of his TAC visits to Enid, Lawton, and Tulsa OK, and asked the group if anyone had any questions. Palmer added he was impressed with the smaller TAC offices he visited. They are concerned with customer service and are more capable of providing good service. He would not go to a large TAC as they are not serious about customer service.

Herb Bohrer added he had the same observation with the larger offices. It is an observation we have all talked about. There is more information included on the TAC visits in the reports sent out as pre-reads. Bohrer reminded the committee to keep in mind we will address these observations at the face-to-face meeting.

Bohrer said in the Boise office the racks are generally filled with forms. They are checked on a daily basis. They are on order if the rack is empty. The Boise office has an Interactive Tax Law Assistant (ITLA) to help determine which forms the taxpayer needs. Taxpayers were disappointed when IRS failed to mail out the tax packages. They thought it would have been nice if the distribution would have given them notice which forms they filed. These were some of the overall observations.

Ellen Smiley asked if the taxpayer had to take a Q-Matic ticket and wait for an assistor to go through the ITLA questions, as a taxpayer could go through the process on [www.irs.gov](http://www.irs.gov) at home. Most taxpayers would not know to do that, though.

A question was asked if the TACs are set up for tax preparers or for taxpayers. Tax preparers bring in a huge number of returns at one time. It seems TACs are geared more to preparers than taxpayers. Beth Braddock said TACs assist anyone who comes in, whether they are a preparer or a taxpayer. Toni Horton said preparers usually bring in a huge number of returns at one time to get a date stamp receipt. That is not an uncommon practice.

Our next call is at the end of April and the face-to-face meeting is in May. The goal is to be done with the observations and be ready for the May meeting.

Smiley suggested we go over Barbara Baldwin's observation review that was just emailed to everyone yesterday. Baldwin went to the Fresno TAC, which is a mid to large size TAC. Signs are visible and taxpayers were waiting to get in. The taxpayers are screened by a greeter who advised there was a 2 hour wait. The forms were visible although there were about 20 percent missing. There were signs posted advising the taxpayers not to take more than 5 forms. The manager said it was an honor system. The TAC has no forms clerk therefore the greeter replenishes the forms. There are no self help stations. LA had three self help stations. Nothing in particular stood out. Smiley asked about the pilot project where computers were available. Are there actual volunteers from the public or TAC volunteers? This would be something the employees would do.

Bohrer said at the face-to-face meeting we'll get organized and then start working on the report. The meeting will be in San Diego. Smiley advised the dates are May 19, 20, and 21.



Travel in the morning on May 19<sup>th</sup>; the meeting will start at 1:00 pm. We'll meet all day May 20<sup>th</sup> and one-half day on May 21<sup>st</sup>, with travel home in the afternoon.

**Program Owner Comments (Horton)**

Toni Horton advised she had nothing to report at this meeting

**Office Updates (Roy Block)**

Block is glad to be able to offer San Diego instead of Denver for the face-to-face meeting this year.

**Approval of Minutes (Bohrer)**

Smiley asked the committee for review and approval of the February minutes. Minutes approved.

**Member Comments/Closing**

Bohrer said he appreciates the effort and energy everyone is putting into the TAC observations. Bohrer advised Audrey Child-Tomie is no longer on the TAC Committee as she resigned from TAP. Block added it was a little late to bring someone new on the TAC Committee; therefore we have elected not to back fill the vacancy.

**Meeting Adjourned**

**Next Teleconference is Tuesday, April 26, 2010 at 2:00 pm CT**

**Taxpayer Assistance Centers (TAC) Committee  
Teleconference Meeting Minutes  
February 22, 2011**

**Program Owners**

- |   |   |
|---|---|
| <ul style="list-style-type: none"> <li>• Beth Braddock</li> <li>• Jane Brough</li> <li>• Toni Horton</li> </ul> | <p>Program Analyst<br/>Supervisor<br/>Tax Analyst</p> |
|---|---|

**Committee Members Present**

- |   |  |   |
|---|--|---|
| <ul style="list-style-type: none"> <li>• Acero, Antonio</li> <li>• Baldwin, Barbara</li> <li>• Bohrer, Herbert</li> <li>• Cabusora, Haidee</li> <li>• Eik, Nancy</li> <li>• Janci, Jerry</li> <li>• Kosanovich, Matt</li> <li>• Levine, David</li> <li>• McPeak, Catherine</li> <li>• O'Neill, Patricia</li> <li>• Palmer, George</li> <li>• Smith, Toni</li> </ul> | <p>Myrtle Beach, SC<br/>Auburn, CA<br/>Springfield, ID<br/>New York, NY<br/>Missoula, MT<br/>Pittsboro, MS<br/>Columbus, OH<br/>Reno, NV<br/>Plano, TX<br/>San Jose, CA<br/>McLoud, OK<br/>Omaha, NE</p> | <p>Member<br/>Member<br/>Chair<br/>Member<br/>Vice Chair<br/>Member<br/>Member<br/>Member<br/>Member<br/>Member<br/>Member<br/>Member</p> |
|---|--|---|

**Committee Members Absent**

- |   |                  |               |
|---|------------------|---------------|
| <ul style="list-style-type: none"> <li>• Child-Tomie, Audrey</li> </ul> | <p>Brick, NJ</p> | <p>Member</p> |
|---|------------------|---------------|

**Guest**

- |  |                        |
|--|------------------------|
| <ul style="list-style-type: none"> <li>• Figueroa, Wilma</li> <li>• Vaughn, Geraldine</li> </ul> | <p>TIGTA<br/>TIGTA</p> |
|--|------------------------|

**TAP Staff**

- |  |  |  |
|--|--|--|
| <ul style="list-style-type: none"> <li>• Block, Roy</li> <li>• Smiley, Ellen</li> <li>• Gabriel, Lisa</li> </ul> | <p>Milwaukee, WI<br/>Milwaukee, WI<br/>Milwaukee, WI</p> | <p>Manager<br/>Program Analyst<br/>Program Analyst</p> |
|--|--|--|

**Welcome/Announcements/Review Agenda (Bohrer)**

**Roll Call (Gabriel)**

Quorum met.

**Approval of Minutes (Bohrer)**

Minutes approved.

## **TAC Visits**

- **Observation Review (Baldwin)**

Barbara Baldwin visited the Sacramento, California TAC. Baldwin commented most racks were empty and had a pink sheet indicating more forms were on order. Baldwin asked the manager what she felt was her biggest challenge with the new procedure of the tax packages not being mailed out. The manager indicated there was an increase in taxpayers coming to the TAC, but the biggest complaint she has been hearing are how the libraries and post offices did not carry any tax forms any more. Taxpayers did not like having to drive the extra distance to the TAC to get a form. Baldwin asked the TAC manager why a taxpayer should wait in line if all they needed were forms. The manager indicated the guard has been instructed to call out every ten minutes to find out if anyone waiting in line only needed forms and to inform those taxpayers they may go directly to the forms rack.

Forms are not available to the public once the TAC office is closed. The employees are given training on IRM Directive 21.3.4.27. Employees can order forms for the taxpayers' and have them mailed to their home. There is concern with tax preparers taking a large amount of forms. The TAC staff will politely intervene and ask them not to take any more than five, but some tax preparers ignore them.

The current IRM procedures allow the TACs to use a pre-determined list of forms they need to have on hand. The Sacramento TAC manager would like to have a part time forms clerk as this would spare her staff from having to get and stack the forms.

Two main points from Baldwin's observations: 1) the atmosphere at the Sacramento TAC felt chaotic and 2) some forms and publications are not available at the libraries or post offices.

Panel member comments:

Antonio Acero explained he is a retired postal employee and stated about three years ago the post office stopped carrying tax forms.

Herb Bohrer noted at the TAC he visited the tax preparers are taking a lot of forms from the forms room.

Patti O'Neill informed the panel five years ago the state of California required any practitioners doing more than 100 returns to E-File. She also stated practitioners can order 1099s and not pay for them.

Nancy Eik noted if a person only needed a few W-2 forms they have to buy a whole pack, where as if you go to IRS you can take the small amount you need.

Bohrer stated his visit with the Boise TAC was very similar to Baldwin's visit to the Sacramento TAC. While Bohrer was in Boise he also visited a congressional office and talked to a manager who indicated she received 63 calls regarding IRS not mailing out tax packages. The public was calling her for help to get tax forms.

- **Identify common observations and concerns (Bohrer)**

1. Perhaps we need to look at people taking many forms such as tax preparers. TACs don't have control, but maybe a limit can be established.
2. At times a taxpayer isn't sure what they need and walks out with a stack of forms an inch thick just to be sure they have everything. An example when this may occur is if the taxpayer filed electronically last year, but is not able to electronically file this year and now has to get paper forms and does not know which ones are needed.
3. When a taxpayer comes in for forms, have the TACs do everything they can for that taxpayer so they leave with everything they need and not have to return for additional forms.

Brough indicated in December IRS had to go back and reformat many forms and publications, which is why so many are going out as late as the end of February and beginning of March. Many forms and publications are affected due to law changes.

The 1040 and 1040A Forms were shipped on January 7, and normally are shipped in December.

ACTION ITEM: Brough will send the link which provided the above information to Roy Block. This information is only for the TACs.

Comments: Block expressed how IRS is not ready for business when the taxpayers are. He suggested adding the information regarding shipments of forms to the TAC Report when it is written at the end of the year.

Bohrer noted the TACs are willing to print off forms but not publications as they are a large document.

### **Next Steps (Bohrer)**

- **Observation review for March and April**

Ellen Smiley emailed an updated spreadsheet on TAC visits and the Manager contact information. Panel Members should call the manager to set up a mutually agreeable date and time for the TAC visit. It is important to get these reviews completed before the face to face meeting.

### **Program Owner Comments (Brough)**

Jane Brough noted that all the TACs are in government leased buildings and the space they get is based on what GSA allows.

A question came up about having a form kiosk in a public location. Brough indicated they had just under 20 kiosks in public places and found they were hard to maintain and costly. Today

there are four left as they have long term contracts not yet expired. One of the kiosks is in the IRS building in Washington D.C. We have found they are not efficient and therefore did not retain them. Less than 100 individuals visited them. It was more costly to run them than the amount of service provided.

Some TACs however do have self assistance kiosk. These Facilities Self Assistance Kiosk have access to the internet and have buttons to click on to retrieve forms. It has menu driven options which are being tested this year. There will be 37 sights set up by March.

Currently there is a card system used by the TACs. If the card stock is yellow, this means the forms should be in the back, if the card stock is another color it could be there are no forms available at this time due to law changes. This information was shared at the Annual Meeting.

### **Office Updates (Roy Block)**

There are four TAP Offices across the country and each of those TAP offices has an ASPECT line, which is a toll free line TAP answers. The offices are receiving many telephone calls about IRS not sending out the tax packages. There was a suggestion to code the paper returns and see where these returns are coming from. There is a concern those in remote areas are not getting the correct forms.

### **Office Note**

Smiley noted the Milwaukee office needs to make sure each panel member is authorized for travel to their TACs. It is important to let Smiley know when you are scheduled for your visit. After your visit, please send an email to Smiley indicating your mileage, as well as any parking or toll fees. In addition panel members need to email Smiley their observation review for their TAC visit.

### **Member Comments/Closing**

Face to Face meeting is in May.

### **Meeting Adjourned**

**Next Teleconference is Tuesday, March 22, 2010 at 2:00 pm CT**

## Taxpayer Assistance Centers (TAC) Committee Teleconference Meeting Minutes January 25, 2011

### Program Owners Present

- Beth Braddock                      Program Analyst

### Committee Members Present

- |                           |                 |        |
|---------------------------|-----------------|--------|
| • Baldwin, Barbara        | Auburn, CA      | Member |
| • Bohrer, Herbert         | Springfield, ID | Chair  |
| • Child-Tomie, Audrey     | Brick, NJ       | Member |
| • Janci, Gerald           | Pittsboro, MS   | Member |
| • McPeak-Tolle, Catherine | Plano, TX       | Member |
| • O'Neill, Patricia       | San Jose, CA    | Member |
| • Palmer, George          | McLoud, OK      | Member |
| • Smith, Toni             | Omaha, NE       | Member |

### Committee Members Absent

- |                    |                  |            |
|--------------------|------------------|------------|
| • Acero, Antonio   | Myrtle Beach, SC | Member     |
| • Cabusora, Haidee | New York, NY     | Member     |
| • Eik, Nancy       | Missoula, MT     | Vice Chair |
| • Kosanovich, Matt | Columbus, OH     | Member     |
| • Levine, David    | Reno, NV         | Member     |

### TAP Staff

- |                 |               |                 |
|-----------------|---------------|-----------------|
| • Block, Roy    | Milwaukee, WI | Manager         |
| • Smiley, Ellen | Milwaukee, WI | Program Analyst |
| • Gabriel, Lisa | Milwaukee, WI | Program Analyst |
| • Robb, Patti   | Milwaukee, WI | Program Analyst |
| • Gold, Annie   | Milwaukee, WI | Secretary       |

### Guest

- Bob Fett                              Burlington, VT                      Local Taxpayer Advocate

### Welcome/Announcements/Review Agenda (Herb Bohrer)

There are no changes to the agenda

### Roll Call (Annie Gold)

Quorum met.

### **Approval of Minutes**

The minutes were approved by the committee.

### **Review of the Project**

Herb Bohrer advised the pre-reads included the TAC Project Committee Proposal and the TAC Project Committee Scope, Description, and Timeline. The Scope, Description, and Timeline was prepared for the Joint Committee (JC), as all Project Committee Chairs provided a description for the JC so all JC members had an understanding of the project assignments.

Ellen Smiley included a list of TAC Questions 2011 in the pre-reads. These questions will be used for the interviews at the TAC offices. Bohrer reminded everyone the questions did not need to be asked verbatim but more like an information gathering assignment.

Beth Braddock added, the issue is very important this year. The IRS has decided not to provide direct mailing of the tax packages this year to taxpayers. This was a budget decision. The effects of recent legislation will prevent many taxpayers from filing early because the IRS computer programming has not yet been completed. The affected taxpayers file Form 1040 Schedule A, *Itemized Deductions*. Braddock went on to say the TAC offices are still getting many of the forms delivered to the offices as IRS releases them. The committee members mentioned how the TAC racks for the forms are pretty empty. Some of the forms are kept behind the customer counter so taxpayers should go to the front desk to ask for the specific forms if they do not see them.

It was suggested to separate the TAC Questions in groups so that observation questions can be answered prior to the interview. The panel members can look at and ask the TAC staff the other questions during the interview process. Smiley offered to group the questions by topic. Bohrer stated he would work with Smiley.

**Action item: Smiley and Bohrer to reformat questions and email to group.**

A member asked if they are required to ask all the questions. There are a couple of duplicate questions, for example #22 and #11 are the same question. This will be corrected once Smiley and Bohrer go through the process and fine tune the questions that were sent in by the panel members. The name of the person stocking the forms does not matter only the person's job title. The employee at the front desk should be able to answer your questions generally.

Toni Smith met with Eric Russ in the TAC in Nashville and will prepare a report of her visit for discussion next month. Mr. Russ was wondering if they will find out the results of the visit? His office likes to keep informed. Bohrer stated it is up to each panel member to decide whether or not to provide a copy of their write up to the manager.

## **TAC VISITS**

The steps to take:

- Make contact with manager of the office and set up a visit.
- Brief the manager on the purpose of your visit
- Find out what is going on in the TAC offices
- Write up a TAC Visit Report about your findings and observations
- If you choose, contact the manager to go over your observations/feedback

Ellen Smiley pointed out that W&I Field Assistance shares the final TAC Report each year on their website. The Program Owner is always very receptive to sharing the information with its employees.

Roy Block pointed out at the end of the year a copy of our report is shared with the TAP Panel members on this committee and the TAP family of volunteers across the country. We can provide copy's to the managers of the TACs visited during the year.

## **Next Steps**

The large majority of the site visits need to be completed by the face-to-face meeting in May. The field work needs to be written and shared with the rest of the committee. We will go through the reports during the face-to-face to come up with the recommendations. All site visits should be completed by the first of May. February is very busy for the TAC offices. This may create a problem trying to get in for a visit if the office manager asks you not to do your observations during this time, please be considerate of the manager's request.

Block indicated there are peaks and valleys of the filing seasons. Most returns come in early (January through February). The offices do see a slow down in foot traffic in March. In April the TAC offices are very busy as the deadline is approaching and the majority of returns are coming in.

Smiley shared the TAC site visit schedule with Toni Horton to obtain the managers name and telephone number and will forward the results to all members once she receives feedback from Horton. Smiley advised Barbara Baldwin the manager in the San Diego TAC office is retiring; therefore that visit will be eliminated. The TAC Visit Questions for 2011 will be emailed along with the manager's name and telephone number.

The cost comparison analysis for this committee has been completed. The results show Denver, CO as the city for our face-to-face meeting. The staffers from IRS are now completing the final segments with the hotels and meeting rooms, etc. The dates for the face to face are May 18 – 21, 2011, but due to budget may need to be changed to three days.



### **Office Updates**

Block explained each TAP office has a toll-free number where the staff receives telephone calls from taxpayers who talk about IRS change. The fact that IRS is not mailing out forms is a definite impact on taxpayers.

We are getting a lot of these types of inquiries. This committee and project is very important. The taxpayers who are affected the most are the ones coming forth and saying you are not giving me what I want in the TAC offices. Maybe we need to take a look at the IRS procedures. Taxpayers who are traveling long distance want to be in compliance but there are no forms in the TAC offices.

We have seen employees who will go out of their way to offer assistance. And then there are some that do not offer any assistance to the taxpayers. That's when the taxpayers call TAP. There are early patterns being seen of this. We need to address this as a committee.

What is the procedure if the form is not available in the TAC? Will the employee offer to mail out the forms to the taxpayers? They will print the form from the web site and give it to the taxpayer. The instruction booklet may be too large to print but they will provide them with the website and give them the toll-free forms order number. .

People living in rural areas are source of interest. Taxpayers are advised to access via internet or call 1-800-829-3676 for the forms. The problem is many of these taxpayers do not have this access.

Note: The time for our next conference call has changed to **3:00 pm ET / 2:00 pm CT / 1:00 pm MT / Noon PT.**

### **Meeting Adjourned**

**Next Meeting will be Tuesday, February 22, 2011 at 2:00 pm Central Time.**