



## 2008 Meeting Minutes Notice Improvement Issue Committee

- December 4, 2008
  - November 19, 2008
  - October 15, 2008
  - September 17, 2008
  - August 20, 2008
  - July 16, 2008
  - June 18, 2008
  - May 21, 2008
  - April 16-18, 2008
  - March 19, 2008
  - February 20, 2008
- 

**Taxpayer Advocacy Panel (TAP)  
IRS Notice Improvement Issue Committee  
Meeting Minutes (Annual Meeting)  
December 4, 2008 at 12:45-4:15PM EST**

**Designated Federal Official (DFO)**

Nancy Ferree, TAP Program Manager, Plantation, FL

**Members Present**

Carolyn Adams-Dodds  
Lee Battershell  
Nancy Eik  
Andrew Feng  
Steve Fulkrod  
Randee Head  
David Kahn  
Susan Lynn  
Robert McQuiston  
Ernest Miller  
Alan Murray  
Lee Stieger  
Chuck Tice  
Harris Widmer

**Members Absent**

Ray Boyle  
Rajiv Shah  
Norma Woodard

**Staff Present**

Sallie Chavez, Analyst  
Marianne Ayala, Analyst  
Anita Fields, Secretary  
Donna Powers, Analyst  
Shelby Jenkins, Secretary



Sidney Gardner, IRS Program Owner  
Jim Cesarano, IRS Program Analyst

### **Guest(s) Present**

None

### **Welcome/Announcements**

Lee opened the meeting and welcomed everyone.

### **Introduction of Committee Members**

Everyone went around the room introducing themselves.

### **Discuss what the Notices Committee does and Meeting Rules**

Lee discussed the duties of the Committee. He also went over meeting rules and etiquette. Sallie advised that there would be some work from the NTA.

### **Comments from the Program Owner**

- Jim Cesarano stated there was a letter sent down from TIGTA (Treasury Inspector General Tax Administration), stating that a good job has been done.
- Sidney stated that he is still working on getting something back on the Vision Impaired project. He also echoed that there would be a lot of work coming down this year. He also stated that the Committee helps with the language in the Notices and how it helps with the budget when errors are made. He also spoke on Pub 8796. Sidney also discussed what the committee would be expecting in the upcoming year, testing of documents in six cities as well as doing comprehension testing. With the budget cut there may not be funds to do these testing and the Committee will be utilized to help facilitate this.
- Jim Cesarano discussed the background and workings of the Committee. He said that a lot what you do is representing the Taxpayer. Our goal is to ensure that the product is understood. You have responsibility being in stakeholder teams representing your point of view from the taxpayer's point of view. You will also be an ADHOC on Notices task work that may need to be done. He also said how the taxpayer's first contact / communications with the IRS should be personable.

Lee expressed his appreciation with the support from Jim and Sidney.

### **Document Assessment Tool (DAT) Training**

Jim discussed the background of DAT and how it is used for the scoring and norming of IRS notices. He also stated that it gives the numerical value to the written quality of the document.

Lee Stieger and Chuck Tice conducted DAT Training for new Notice Committee Members. They discussed what gets scored and normed, document assessment score, and how to use the DAT.

### **DAT Score an Actual Document**

Committee members individually scored an Actual Document. They went over message and task, logical structure and presentation of a notice. After completing the DAT scoring Lee explained how to norm the scores. After the scores are normed the team leader is responsible for getting the spreadsheet to the TAP Analyst, Sallie Chavez. Lee advised Committee Members they need to make an effort to be on the calls for scoring, if they are not available arrangements have to be made for someone to sit in their place.



## **Election of New Chair & Vice Chair**

The Chair and Vice Chair for the 2009 Notices Issue Committee is Chuck Tice and Ernest Miller respectively.

Jim thanked Lee for a job well done.

## **Discuss standing conference call dates and face-to-face meeting locations and dates and quorum**

The committee has agreed by consensus to hold their monthly conference call the 2nd Thursday of each month at 2:00pm Eastern Standard Time (EST). The three tentative locations to hold the face-to-face meeting are Detroit, MI and Salt Lake City, UT, Ogden, UT. The date the committee agreed upon is July 9-10, 2009. The committee agreed by consensus that quorum is 50%.

## **Discuss Subcommittee Assignments**

**DAT Assessment Subcommittee** is an ongoing subcommittee.

**Insert Project**—this is with the reviewing as it now stands is still ongoing.

**Combined Forms & Testing** is closed.

**Notice Review**—this is the quick turn-around committee. They are required to score something within 7 days and if the notice reviewer request it sooner then it is turned around within 3 working days.

**Installment Agreement Letters** is still ongoing.

Lee stated that after reviewing there will be 4 subcommittees. All the subcommittees need to be revamped due to the high turnover of the committee.

## **Meeting Close/ Photo**

Nancy Ferree thanked all members that are rotating off the panel and expressed how much we appreciate all of their hard work. All third year members on the committee said their goodbyes and expressed how much fun they had and that they are going to miss everyone. Lee Stieger closed the meeting by thanking everyone for attending. Meeting was adjourned.

**\*Certification: These minutes were approved by the committee by consensus.**



**Taxpayer Advocacy Panel (TAP)  
IRS Notice Improvement Issue Committee  
Meeting Minutes  
November 19, 2008 at 12:30PM EST**

**Designated Federal Official (DFO)**

Nancy Ferree, TAP Program Manager, Plantation, FL

**Members Present**

Carolyn Adams-Dodds  
Ben Chapman  
Steve Fulkrod  
Joe Hurr  
David Jones  
Neil Mitchell  
Max Scott  
Lee Stieger  
Chuck Tice  
Edward Uhrig

**Members Absent**

David Meister  
Norma Woodard  
Howard Stahl

**Staff Present**

Sallie Chavez, Analyst  
Anita Fields, Secretary  
Jim Cesarano, IRS Program Owner

**Guest(s) Present**

None

**Welcome & Roll Call/Quorum**

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

**Approval of Meeting Minutes**

Minutes for September and October were approved by consensus.

**Comments from the Program Owner**

Jim Cesarano stated there are a couple things we need to follow-up on. Another appointment is needed to discuss the 9183. The issue that concerns me the most is that the members that scored it will be leaving before we can reschedule. Jim also stated that Charmaine Johnson is putting together a team to work on the Installment Agreement (correspondex) letters that the panel scored. Jim mentioned that there was talk on having a meeting with Kevy and the Insert subcommittee.

**Publication 3498A**

Steve reported that a norm score was sent to Sallie and Jim today.

Sallie reported that all notices have been scored and sent to Jim this morning.

**DAT Scoring All DAT scores have been completed except for one that Jim sent to Sallie this morning. Review of Open Projects**



Lee stated that Sallie sent out a list of projects the committee still have open.

Sallie reported that CP 13 is the only project that is currently open.

**Visually impaired** the committee agreed by consensus to close this out. If something comes back then we can re-open at a later date.

#### **Subcommittee Assignments**

**DAT Assessment Subcommittee** is an ongoing subcommittee.

**Insert Project**—this is with the reviewing as it now stands is still ongoing.

**Combined Forms & Testing** is closed.

**Notice Review**—this is the quick turn-around committee. They are required to score something within 7 days and if the notice reviewer request it sooner then it is turned around within 3 working days.

**Installment Agreement Letters** is still ongoing.

Lee stated that after reviewing there will be 4 subcommittees. All the subcommittees need to be revamped due to the high turnover of the committee.

#### **Year End Review & Related Subjects**

Lee asked that the committee members complete the year-end assessment form and have it completed and sent to Sallie by next month's meeting. Lee wants to use that to assist in planning for the annual meeting.

Lee asked that Sallie send the assessment form out to the members by email.

Jim mentioned that there was an interesting comment regarding responses on the DAT scores. He explained that there will probably only is a response if you are working directly with a team.

#### **Annual Meeting**

Sallie reported that the Notices meeting is 1245 to 4:15 on Thursday December 4, 2008. There is a rough draft of the agenda in the agenda folder. There is going to be a Document Assessment Training (DAT) at the annual meeting. We are looking for someone to volunteer to do the training. Jim will give background on how the DAT tool is used and how it was developed.

#### **Meeting Close**

Nancy Ferree thanked all members that are rotating off the panel and expressed how much we appreciate all of their hard work. All third year members on the call said the goodbyes and expressed how much fun they had and that they are going to miss everyone. Lee Stieger closed the meeting by thanking everyone for attending. Meeting was adjourned.

**\*Certification: These minutes were approved by the committee by consensus on December 4, 2008.**



**Taxpayer Advocacy Panel (TAP)  
IRS Notice Improvement Issue Committee  
Meeting Minutes  
October 15, 2008 at 12:30PM EST**

**Designated Federal Official (DFO)**

Nancy Ferree, TAP Program Manager, Plantation, FL

**Members Present**

Ben Chapman  
Joe Hurr  
Max Scott  
Lee Stieger  
Chuck Tice  
Norma Woodard

**Members Absent**

Carolyn Adams-Dodds  
Steve Fulkrod  
David Jones  
Neil Mitchell  
David Meister  
Howard Stahl  
Edward Uhrig

**Staff Present**

Sallie Chavez, Analyst  
Marianne Ayala, Analyst  
Anita Fields, Secretary  
Jim Cesarano, IRS Program Owner  
Sidney Gardner, IRS Program Owner

**Guest(s) Present**

None

**Welcome & Roll Call/Quorum**

Lee opened the meeting and welcomed everyone. Quorum was not met.

Lee mentioned that he thought it was really good for the Notices Committee to get mentioned in the W&I newsletter. He said it was a great article to give them more support and work.

**Approval of Meeting Minutes**

Minutes were not approved because we did not have quorum.

**Comments from the Program Owner**

Sidney mentioned that he has been in contact with David Krieg's office for a follow-up on the memo that was sent up pertaining to the Visually Impaired Project. He is diligently working to get a response to the committee from that office. He also mentioned that his office will be involved in the Commissioner's new group. The Taxpayer Communications Liaison Team will have approx 5 different teams. He



just wants the committee to continue their efforts in helping out with the insert effectiveness team where the committee provides feedback on the letters that go out to taxpayers.

Sidney said that he agrees with Lee in reference to the newsletter. He stated what he was trying to do is get the information out there to let people know how they have worked with TAP in the past and how they will continue to work with TAP in the future. Hopefully that can open up some new avenues in terms of people trying to get you to help them out in the decisions they make with their Notices.

Lee said that not only Notices as a committee but TAP as a whole is real proud of the piece in the newsletter because it gives us more emphasis in some areas where we are not getting recognition or good responses from IRS. This just adds to the things that says at least part of the IRS appreciates us.

Sidney thanked Lee for the comment, but said that Jim Cesarano was the one responsible for the article and made sure that it got into the W&I newsletter.

Jim Cesarano stated that he, Sallie and Kely is trying to get a good time for everyone to meet on a call to talk about the inserts.

Jim also mentioned that there are two issues with the Compliance team that is going to be started. 1. We are on a Continuing Resolution (CR), so the SME would not be able to get funds for a new team until we are past the CR. She is now putting in patches and changes on the letters that the Notices Committee have been scoring on compliance. They are probably going to be handling the changes without a formalized team for now. There is also an interest in following-up on the DAT scores that the committee has been doing so somewhere down the line there may be a focus group on why some things were scored the way they were.

Lee mentioned that if they want a response back they need to try and set that up in about a month, because most of the members that did the scores will no longer be on the committee. Jim said that he has made the SME aware of that, but there in not much she can do at this time.

Jim asked that when the members rotate off can they put together something to let the new member know how to use the tool to score correspondex letters.

Lee stated if anyone has any comments to forward them to him and he will put something together and give it to Sallie and Jim to use next year.

**Publication 3498A**

There was no update.



## **Review of Open Projects**

Sallie Chavez stated that there are only two open projects out there and they are 3498A and one insert that need to come back.

Lee asked about the penalty letters. The Penalty Letters are completed and we are just waiting on a response from the IRS. Jim stated that the response has been sent and it is closed.

**Visually Impaired** is complete but is still open waiting on comments back so that we can close that.

**Forms and Testing** is inactive because they came back and told us what they wanted us to do, but never gave the committee a project on it. Jim will check on the status of that. Sidney said there are opportunities for testing, but just don't have a calendar but by next meeting they will have something more concrete next month.

Lee asked that Sallie send out an updated list with the meeting agenda for next month's call.

## **Year End Review & Related Subjects**

Lee asked that the committee members complete the year-end assessment form and have it completed and sent to Sallie by next month's meeting. Lee wants to use that to assist in planning for the annual meeting.

Lee asked that Sallie send the assessment form out to the members by email.

## **Annual Meeting**

Lee mentioned that the Annual Meeting is going to be 1-5 December 2008. Travel days are Monday and Friday, unless you are elected Chair or Vice Chair, then your return travel day will be Saturday. He mentioned this year that the annual meeting this year is going to have more committee sessions than joint sessions. Lee said that he is going to try to have a draft agenda for the November meeting. He also mentioned that it was suggested that elections are held later in the meeting, so that the outgoing chair handle the majority of the meeting. He asked that members think about that and once the entire committee is present next month we can make a decision.

Lee asked Nancy and/or Sallie if there was anything left to mention that he have not already covered. Sallie will send out another set of letters to be scored tomorrow and Lee mentioned that they should try to get them completed by next month's meeting.

## **Meeting Close**

Lee Stieger closed the meeting by thanking everyone for attending. Meeting was adjourned.

**\*Certification: These minutes were approved by the committee by consensus on November 19, 2008.**





**Taxpayer Advocacy Panel (TAP)  
IRS Notice Improvement Issue Committee  
Meeting Minutes  
September 17, 2008 at 12:30PM EST**

**Designated Federal Official (DFO)**

Nancy Ferree, TAP Program Manager, Plantation, FL

**Members Present**

Carolyn Adams-Dodds  
Ben Chapman  
Steve Fulkrod  
David Jones  
Neil Mitchell  
David Meister  
Max Scott  
Lee Stieger  
Chuck Tice  
Edward Uhrig

**Members Absent**

Joe Hurr  
Howard Stahl  
Norma Woodard

**Staff Present**

Donna Powers, Analyst  
Anita Fields, Secretary  
Jim Cesarano, IRS Program Owner

**Guest(s) Present**

None

**Welcome & Roll Call/Quorum**

Lee opened the meeting and welcomed everyone.

**Approval of Meeting Minutes**

Minutes were approved by consensus.

**Comments from the Program Owner**

Jim stated that emails have been going back and forth regarding the Visually Impaired. Sidney is going to follow-up to see what happened to the memo that was sent to SPEC and if there is going to be any follow-up.

There are new things happening with the review process. Things are coming in slow. We are going to work on ways to market using the pilot program to the analyst.



The Commissioner has formed a task force on taxpayer communications. There are going to be different teams formed. Right now an Insert Team has been formed and we don't know if the current insert project will be affected. There will be certain things that the task force is looking at that will impact Notices. There is really nothing formal that have come out yet. We do know that the way Notices are reviewed will change. Not really sure how this will affect the day to day workings of Notices. The website for the marketing firm that was hired to head this up is [www.siegelgale.com](http://www.siegelgale.com).

Jim talked about the document 9183 which was a desk guide that went obsolete approx. 8 years ago. He feels that it can still be a useful document. He wants to know if the TAP can/will help build a case to bring this document out of obsolete.

David Jones asked if it would be feasible for Area 7 to work on an issue dealing with Vision Impaired and Large Print tax forms. He was advised to speak with his analyst and have them do research for prior efforts before pursuing. Nancy indicated that Area 2 had worked this issue a few years ago. Also if it is dealing with forms it should be sent to the Tax Forms and Pubs Issue Committee first.

Jim will forward document 9183 to Sallie for you to take a look to see if you want to work it. If you decide not to work it, then Jim would like to have it DAT scored.

#### **Publication 3498A**

Steve Fulkrod reported that there is a new version that he has been asked to score. Steve and his subcommittee will work on it and have a report next month.

#### **Insert (Stuffer) Project**

From the three projects that were assigned all have been confirmed to have been forwarded to Sallie. Jim has confirmed that he forwarded them to Kevi. Jim will contact Kevi so that she can give the committee feedback on the work they have done.

Dave Jones is concerned that in two months the members that worked on the CP 12 will be rotated off the panel. They would like to get some sort of feedback within the next two months or there will not be anyone who worked on the project around.

**ACTION: Lee Stieger to follow-up with Sallie to see where we are on the Insert Project.**

#### **Installment Agreement Letters**

Jim reported that the review hasn't been started yet. Charmaine is trying to make a case. It will probably start the next fiscal year. The compliance team has not been formed yet, but it is still in the works.



**Vision Impaired**

Lee reported that we are just waiting on feedback from the last set of memos that was forwarded up the channel. It is basically closed; we are just leaving this open until we hear back from Sidney Gardner on the status.

**Meeting Close**

Ben asked if it is possible to go back and ask former members if they have anything on scoring Correspondex letters. He thinks it is worth a try.

Lee Stieger closed the meeting by thanking everyone for attending. Meeting was adjourned.

**\*Certification: These minutes were approved by the committee by consensus on November 19, 2008.**



**Taxpayer Advocacy Panel (TAP)  
IRS Notice Improvement Issue Committee  
Meeting Minutes  
August 20, 2008 at 12:30PM EST**

**Designated Federal Official (DFO)**

Nancy Ferree, TAP Program Manager, Plantation, FL

**Members Present**

Carolyn Adams-Dodds  
Ben Chapman  
Steve Fulkrod  
Joe Hurr  
David Jones  
Lee Stieger  
Chuck Tice  
Norma Woodard

**Members Absent**

Neil Mitchell  
David Meister  
Max Scott  
Howard Stahl  
Edward Uhrig

**Staff Present**

Donna Powers, Analyst  
Anita Fields, Secretary  
Jim Cesarano, IRS Program Owner

**Guest(s) Present**

None

**Welcome & Roll Call/Quorum**

Lee opened the meeting and welcomed everyone. Lee mentioned that if anyone send the response to the installment letters directly to Jim, please copy Nancy Ferree and Sallie Chavez.

Ben mentioned that last month the committee decided not to send comments directly to Jim Cesarano and Sallie will have a prompt turn-around. Ben thinks everyone should be doing the same thing and forwarding the information to Sallie and not copy Jim and allow the TAP Staff to forward to Jim to meet the due date.

Nancy agreed that it would be extremely helpful if the committee adapt that procedure because Sallie sometimes consolidates responses.



Lee said that if the responses are not sent through Sallie then he is afraid that the committee will not get credit because something will be missed.

Jim clarified that when something comes down for the Notice Review Subcommittee there is a 7 day turn around for DAT scoring. If it is urgent then there is a 3 day turn-around with only narrative comments.

Dave Jones requested that when something comes down can you please indicate the deadline. Jim stated that he will place the please respond by in the subject line.

Jim has clarified the difference between the Correspondex letters and CP notices. Jim suggested that the committee might want to establish an archive of knowledge that can be passed to new members on how to score correspondence letters.

Dave Jones suggested that new members or 2nd year member be head of subcommittees when assigning new issues so there will be continuity.

#### **Approval of Meeting Minutes**

Minutes were approved by consensus.

#### **Comments from the Program Owner**

Jim just mentioned that Kevi might have some new assignments coming down the line soon. If Notice Governance goes through, there will probably be an impact on actual notice reviews, in terms of correspondence going through DPTs, rather than going through reviews. There may be more of an emphasis on formalizing or moving more of the programs to work with the Dynamic Process Team procedure.

Lee said that in early spring there was a memo sent on the Visually Impaired Project to David Krieg, Director, Leadership and Education (HCO) and Julie Garcia, Director, Stakeholder Partnership, Education & Communications (SPEC) following up on the response memo (February 2008) sent by the Notice Improvement Office (NIO) to TAP. NIO's response memo had informed the committee its recommendations were beyond the NIO's scope and it was forwarding TAP's memo to David Krieg and Julie Garcia. We haven't heard anything back. We are still waiting to hear something back.

**ACTION: Jim will follow-up with Sidney on his intent to contact David Krieg and Julie Garcia to determine if they had a response to the follow-up memo.**

#### **Publication 3498A**

Steve Fulkrod doesn't have anything new on this. Ben reported that last month Sidney thanked the committee for their comments and he may ask the committee to DAT score the 3498 in August or



September.

Jim stated that he hasn't heard anything from the team lead. Therefore there is not anymore work to be done on this form. If the team has more work to be done he will contact Sallie.

This project is now closed.

### **Insert (Stuffer) Project**

The subcommittee members were not available; therefore we will have a report next month.

### Installment Agreement Letters

Tice stated that he have his and Norma Woodard's scores, but doesn't have any of the other scores. Dave Jones stated that he sent his scores to Sallie and apparently she couldn't read the file, therefore he is going to resend them to Sallie.

### FAT Update

Ben Chapman reported for Max. Right now all work has been completed for the FAT and it is still in draft format until we get a consensus from the entire committee. After that the next step is to present it to the Tax Forms and Pubs committee.

Nancy stated that she spoke with the Program Owners from the Tax Forms and Pubs committee and they thought it was a wonderful product, but were not interested in using the FAT form for scoring their forms.

Jim mentioned that although Tax Forms and Pubs don't want to use it, the Notice Committee can use the FAT informally to score forms that come to them from SMEs.

It is placed in an in-active status for the Notice Committee. They also agreed to send it to the chair of Tax Forms and Pubs, Al Rodriguez.

Lee asked if there should be standard developed. Ben stated no, he don't think so. Maybe we should take Dave Jones one page standards and adopt that instead of putting effort into creating pages on top of pages.

**ACTION: Lee is going to send an email of the FAT to Al Rodriguez and Ken Wright and inform them that the form is complete and they can use it if they want.**

### Meeting Close

Follow up on correspondence letters, may need to form committee to look at this.

Lee Stieger closed the meeting by thanking everyone for attending. Meeting was adjourned.



\*Certification: These minutes were approved by the committee by consensus on 9-17-2008.



**Taxpayer Advocacy Panel (TAP)  
IRS Notice Improvement Issue Committee  
Meeting Minutes  
July 16, 2008 at 12:30PM EST**

**Designated Federal Official (DFO)**

Nancy Ferree, TAP Program Manager, Plantation, FL

**Members Present**

Carolyn Adams-Dodds  
Ben Chapman  
David Jones  
Neil Mitchell  
Max Scott  
Lee Stieger  
Chuck Tice

**Members Absent**

Steve Fulkrod  
Joe Hurr  
David Meister  
Howard Stahl  
Edward Uhrig  
Norma Woodard

**Staff Present**

Donna Powers, Analyst  
Sallie Chavez, Analyst  
Lisa Gabriel, Secretary  
Sidney Gardner, IRS Program Owner  
Jim Cesarano, IRS Program Owner

**Guest(s) Present**

None

**Welcome & Roll Call/Quorum**

Lee opened the meeting and welcomed everyone.

**Approval of Meeting Minutes**

Minutes were approved by consensus with some minor corrections. Under Welcome and Roll Call/Quorum, Lee Stieger opened the meeting. One page 2 (2nd paragraph) there is something missing. It was agreed to add "asked Kevlyn". On page 3, under FAT Update, should read Bob Erickson and not Ben Erickson. Also on page 3 (first full paragraph), it should be Charmaine Johnson, not Charmayne Jackson. With these changes, meeting minutes are approved.

**Comments from the Program Owner**

Program Owner Rep Jim Cesarano stated the SME looked at comments from Sub-Committee on the Pub 3498A. Next step is comprehensive testing which takes place last week of July. It will be available after that for another review in August or September.





SME requested a short meeting about the scoring of the CP91. The SME would like to talk to folks who score, find out more about scoring.

Kevlyn, the lead for stuffer elimination team contacted, would like to meet Tuesday at 2:30 pm to talk about the report sent on CP161.

The Notice Review Team has already been assigned their first project and has completed it. This was Jim Cesarano's own Notice Review. He will look at comments when writing review.

The Installment Letters that need to be DAT scored have been sent out. They are all correspondex letters. There are some issues about correspondex letters. Original purpose is response letters, generated to answer taxpayers. There are centralized approved paragraphs put in letters. There are no records kept of paragraph usage, no statistics on this.

Jim Cesarano stated correspondex letters were previously scored by TAP Members but he and Analyst Sallie Chavez are unable to find the information on how the previous TAP Members scored the letter. We may need to set up another meeting on how to score these letters.

Some issue with bolding and italics not being an option. There was a discussion whether this is applicable or not.

Correspondex is hooked into IDRS (Integrated Data Retrieval System). Master file system is older and IRS is trying to centralize everything.

#### **Publication 3498A**

DAT scoring follow-up on Fulkrod

#### **Notice Review-Letter 4384C**

The new Notice Review sub-committee met last month on June 25, 2008. They discussed the guidelines, rules, pilot program with Jim Cesarano. They agreed to get back to the Notice Reviewer with comments within three business days and with DAT score within seven business days.

Notice Review Sub-Committee had three people working on it and responded within the time frame. If this takes off and we get some volume of letters with three business day turnaround, we may need to change committee members so no one can get too burdened. We may need to rotate people in and out.

#### **Direct Mail Marketing Plan**

Joe Hurr participated in a conference call with the IRS SME and contractors. The contractors asked about direct market methods, asking feedback, and answered other questions. The contractors were happy with answers. There should be no additional requests on this issue. Closed as completed issue.



### **Insert (Stuffer) Project**

The CP161 committee, scheduled to have meeting next Tuesday.

### **Installment Agreement Letters**

Tice has no information to give on this. The Program Owner provided a response to the feedback on the CP501, 503 and 504.

### **FAT Update**

Chavez informed Max Scott that Bob Erickson does not have any interest in the FAT. He asked for any additional comments and he will provide a draft to committee for approval.

Stieger will get a copy and read and give comments.

### **Meeting Close**

Follow up on correspondex letters, may need to form committee to look at this.

Lee Stieger closed the meeting by thanking everyone for attending. Meeting was adjourned.

**\*Certification: These minutes were approved by the committee by consensus.**



**Taxpayer Advocacy Panel (TAP)  
IRS Notice Improvement Issue Committee  
Meeting Minutes  
June 18, 2008 at 12:30PM EST**

**Designated Federal Official (DFO)**

Sallie Chavez, Acting TAP Program Manager, Plantation, FL

**Members Present**

Carolyn Adams-Dodds  
Ben Chapman  
Joe Hurr  
David Jones  
David Meister  
Neil Mitchell  
Max Scott  
Lee Stieger  
Chuck Tice  
Norma Woodard

**Members Absent**

Steve Fulkrod  
Howard Stahl  
Edward Uhrig

**Staff Present**

Anita Fields, Secretary  
Jim Cesarano, IRS Program Liaison  
Sidney Gardner, IRS Program Owner  
Ann Gelineau, IRS Program Owner

**Guest(s) Present**

Kevlyn Painter, Ogden, UT

**Welcome & Roll Call/Quorum**

Lee Stieger opened the meeting and welcomed everyone.

**Approval of Meeting Minutes**

Minutes were approved by consensus with the correction of Jim Cesarano, IRS

**Inserts Project—from Program Owner (Kevlyn Painter)**

Kevlyn said there are 13 notices that we want you to look at, and Jim has a handout he will be forwarding. The insert effectiveness team identifies 13 notices to find a process to remove inserts if they are not needed by the taxpayer or they don't find them useful. We want you to look at instances where some of the information can be combined into the notice. Kevlyn is interested in getting the view point of the taxpayer's perspective of the 13 notices and their related inserts. If they read them, find them useful, help relieve their burdens or are we sending them things they don't need. They chose the inserts that was not mandated so they were more informational. We are trying to develop a process to run the notices and inserts



through and the information we are sending is useful. We don't want to do anything to increase taxpayer burdens.

Lee Stieger asked Kevlyn what exactly do you want us to report back to you on and how do you want the report. There was a rough draft on the report out of the three notices we reviewed at our face to face. Lee asked Sallie to forward the report she received from Ben to Jim and Kevlyn for them to let us know how they would like to have the feedback. Lee stated to Kevlyn, feel free to make any changes to the format of the form that will give you the information you want.

#### **Comments from the Program Owner**

Sidney thanked everyone for doing the DAT scoring. He also informed the committee that they are in the process of forwarding Publication 3498A for you all to score. Jim Cesarano said that there's a lot of new news. One relates to Kevlyn's team. It is different than acting as an external stakeholder and it is different those notices she wants you to look at. The team is working with a contractor and the contractor is in their research phase and they want to interview someone that worked with the direct marketing project. They are looking to talk about insert effectiveness, and direct marketing. It will last approximately 45 min to 1 hour and will be directed. The hours are between Monday-Friday 1-4 pm EST. If you have someone interested give the name to Nancy and she will get it to Jim to schedule the interview. Joe Hurr volunteered to do the interview the week of June 30, 2008.

Publication 3498 has been re-written and the team would like for stakeholders to comment on it as an external stakeholder on whether it help or hurt the taxpayer, what you want to see, what you don't want to see, what changes you like and what changes you don't like. The changes need to be in by the 24th of June. Jim also mentioned that he would like to get a DAT scoring of the re-written Pub 3468. Dave Jones asked if a Pub 1 would go out with the form also, he stated that a lot of the same info is covered in Pub 1. Jim mentioned if it is going out with Pub 1 then it doesn't need all the information that is contained in the 3468.

Sallie stated that she will put a team of three or four people together along with Chuck and get the Pub 3498 DAT scored.

Jim announced a pilot program during a branch meeting he had at the end of May. This program is for their reviewers when they are reviewing correspondence and letters to have a short comment period where they can get comments from TAP. Jim wants to set up a committee to discuss the logistics of this pilot program. The program is called Notice Review Subcommittee. There is a tentative meeting schedule for the Notice Review Subcommittee for next week the date and time to be determined.

Jim has another new project. Charmayne Johnson is a Notice Writer. She is starting changes in her program. She thinks the changes are going to affect about 30 letters that she has responsibility for. She would like DAT scores for the letters that have



not been scored yet. These letters will have priority over the priority letters. Jim and Sallie will go over the list to determine what letters have already been scored. Sallie and Chuck will meet and put some teams together to score these letters.

**Insert (Stuffer) Project**

Sallie stated that stuffer project is going to be put on hold until Kelvyn gets back to us with her thoughts on the CP 161.

**Form 886H-HOH**

Dave Meister stated that the 886H-HOH is complete. He sent in the completed DAT score worksheets to Sallie on Monday.

**FAT Update**

Max stated he only received comments from Ben and Chuck and he will fold that into the FAT and send that in. He is still waiting on the call with Bob Erickson to discuss if there is anything else that need to be included. He will get the revised FAT out to the committee before the next meeting.

**Meeting Close**

Dave Jones requested to receive an updated list of the committee and the subcommittee lists. Lee Steiger closed the meeting by thanking everyone for attending and being involved with the call. Meeting was adjourned at 1:50pm.

**Next Meeting is a teleconference on July 16, 2008 at 12:30pm EST.**

**\*Certification: These minutes were approved by the committee by consensus on July 16, 2008.**



**Taxpayer Advocacy Panel (TAP)  
IRS Notice Improvement Issue Committee  
Meeting Minutes  
May 21, 2008 at 12:30PM EST**

**Designated Federal Official (DFO)**

Nancy L. Ferree, TAP Program Manager, Plantation, FL

**Members Present**

Carolyn Adams-Dodds  
Ben Chapman  
Steve Fulkrod  
Joe Hurr  
David Jones  
David Meister  
Max Scott  
Chuck Tice  
Norma Woodard

**Members Absent**

Neil Mitchell  
Howard Stahl  
Lee Stieger  
Edward Uhrig

**Staff Present**

Anita Fields, Secretary  
Sallie Chavez, TAP Analyst  
Donna Powers, TAP Jr. Analyst  
Jim Cesarano, IRS Program Liaison  
Sidney Gardner, IRS Program Owner  
Ann Gelineau, IRS Program Owner

**Guest(s) Present**

No guests were present.

**Welcome & Roll Call/Quorum**

Chuck Tice opened the meeting and welcomed everyone.

**Approval of Meeting Minutes**

Minutes were approved by consensus with the correction of Jim Cesarano, IRS

**Comments from the Program Owner**

Sidney stated that he will respond back to the group at a later date regarding the CD on direct marketing after he takes another look at it and have their research folks look at it. The teleconference that was held last week with Howard Rasey and Barbara Powell from W & I on testing was a success. There were two things that they felt the TAP could help with. 1) To serve as a roundtable or informal focus group in which they could bounce some things off them regarding



some of the questions or test participants. 2) Looking at some of the scenarios that we will be providing the test participants and allowing the issue committee to comment on that. We think that will make our product a little better and help us gather information to aide in us moving forward. Sidney Gardner stated that Kevlyn Painter the team leader for the insert project will be joining the next call to discuss the 13 Notices that the team received in Salt Lake City. Sidney Gardner also mentioned that Sallie will have to do some leg work to see if it is permissible to allow former TAP members to participate in the testing project.

Jim Cesarano let the team know they should keep the TAP scoring of the penalty letters at a higher priority than the regular list. Ben Chapman informed Jim that there will be a call this afternoon to reach consensus on the scoring. The final scores will be sent to Sallie no later than Friday.

Jim discussed the SPOC review process. He stated that it will come without any background information. He mentioned that if it is possible to DAT score the product and get it back to the reviewer would be excellent. The review time frame is very short; therefore it will not be as extensive as you are use to and we are not looking for anything formal for the reviewer and you will not receive anything back. We may be able to send out an approved version of the letter to see if any of the comments were incorporated. Nancy asked what will call the subcommittee. Sidney suggested Notice Review. It was agreed to call it Notice Review Subcommittee. Jim mentioned that once the subcommittee is formed and have a meeting he would be interested in joining to get some insight on how you all will go about reviewing the letters. Ben Chapman wanted to confirm that the subcommittee be formed after they receive the first letter. Jim stated that there needed to be an organization meeting to sort out some of the logistics. He re-iterated that this is only a pilot and he is the only reviewer at this time.

### **Insert (Stuffer) Project**

Dave Meister submitted to Sallie on April 26, 2008 the subcommittee report on CP 12. Sallie mentioned that Lee Stieger wanted the report placed in the format that was discussed at the Face-to-Face meeting. She sent the document to Lee and is waiting for his approval before he gets back to the subcommittee.

Steve Fulkrod asked if there is a response on the three page recommendation that went to the Program Owners. Jim Cesarano stated that Kevlyn has drafted a response memo for the 501, 503 and 504. She will be on next month's meeting. Jim is hoping that the memo get approved and signed before the meeting so that he can get it out to the committee.



### **Combine forms & Testing Project**

David Jones gave a review for those that are not familiar with the project. The committee was asked to review a 40 page manual. There was a lot of technical material in there. The opinions of the committee members were probably beyond their expertise. They focused on what TAP could do for the process. Basically the memo that was sent stated that we were to provide the IRS with the assistance in the testing process and also to critique the testing process and may involve TAP in pre-testing or in pilot projects.

### **Penalty Letters (DAT)**

Ben Chapman said that there is a call schedule for 5:00 May 22, 2008 to go over consensus of the scores. After the call we will send scores to Sallie.

### **Form 886-H HOH**

Dave Meister stated that the 886H-HOH should be closed out no later than June 2, 2008.

### **FAT Update**

Max said that he has not received any comments for the draft FAT. He is waiting to hear from the remainder of the committee before he can do anything on that. Max stated that he would like to be on the call with Bob Erickson regarding the FAT being that he is the chair of the subcommittee.

### **Meeting Close**

There was a new subcommittee called Notice Review was formed with Dave Meister, Chuck Tice, Carolyn Adams-Dodds, Joe Hurr and Ben Chapman. Ben Chapman is the lead. Dave Jones asked Sallie to send out a new subcommittee list. Jim informed Sallie that he will not be available for any meetings next week. Chuck thanked everyone for participating today and not to forget to complete the meeting survey.

**Next Meeting is a teleconference on June 18, 2008 at 12:30pm EST.**

**\*Certification: These minutes were approved by the committee by consensus on June 18, 2008.**





**Taxpayer Advocacy Panel (TAP)  
IRS Notice Improvement Issue Committee  
Meeting Minutes (Face to Face)  
April 16-18, 2008 at 1:00PM MT**

**Designated Federal Official (DFO)**

Nancy L. Ferree, TAP Program Manager, Plantation, FL

**Members Present**

Ben Chapman  
Steve Fulkrod  
David Jones  
David Meister  
Neil Mitchell  
Max Scott  
Lee Stieger  
Chuck Tice  
Edward Uhrig

**Members Absent**

Carolyn Adams-Dodds  
Joe Hurr  
Howard Stahl  
Norma Woodard

**Staff Present**

Anita Fields, Secretary  
Sallie Chavez, TAP Analyst  
Jim Cesarano, IRS Program Liaison (April 16-17)  
Sidney Gardner, IRS Program Owner

**Guest(s) Present**

No guests were present.

**Welcome & Roll Call/Quorum**

Lee Stieger opened the meeting and welcomed everyone.

**Introduction of Committee Members**

Lee suggested that we go around the room and introduce ourselves.

**Approval of Meeting Minutes**

Minutes were approved by consensus with the correction of Jim Cesarano, IRS Program Liaison instead of Program Owner.

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**Wednesday, April 16, 2008**

**National Office Report**

Nancy Ferree gave the national office report. She mentioned that the budget is suffering from budget cuts. We as a staff are adjusting ways that we can save on the budget. She discussed the Town Hall meetings which occurred in Alabama and Durham. The next scheduled Town Hall is Springfield, IL. She mentioned that Barbara Foley has been promoted to a grade twelve and will be leaving TAP soon. Inez De Jesus is leaving May 31st due to retirement. There is a new Jr. Analyst that will start April 27th in the Plantation office. Recruitment is going well. We have more applications in draft and final this year than last year. There are 568 drafts and 328 in final. Max Scott suggested that we get harder on the interviews. We need to try and impress upon the candidates how much volunteer time is required. Nancy Ferree reported that the Annual Report is coming out soon; it is coming along well. She recalls that Steve Berkey stated that there have been 305 issues elevated in the five years TAP has been in existence.

**Expectations from the Program Owner**

Sidney Gardner wanted to let the group know that the work you do is important to us. He wants to ensure his recommitment to the group. He stated that the DAT is going to dry up soon. He wants to try and come up with new ideas on how you can continue to help. Testing is one area he feels that the panel can help. There is a meeting scheduled for May 13, 2008 at 10:00 am EST to discuss the possibilities. He would like to have conversations around the scores and know how the committee gets that score. Jim suggested that what needs to be focused on is the before and after scores. How we want the teams to respond after they get the scores. Sallie stated that she is going to start giving a little more information about the notices before she passes them along to the committee. Sidney mentioned that he will follow-up on some members that are interested in attending some training sessions.

Jim reported that his office is now part of distribution and publication. The Notice Team has the recommendation that was submitted and will be meeting with you. There is a system called Publishing Service Request (PSR). When a notice comes in it is sent to a reviewer. He wants to know if there is a possibility to get the Notice committee to work with a reviewer. The reviewer normally has to have something back within 30 days. The timeframe would be a five day turn-around. Bernie Coston is going to the May 29th meeting he will give a presentation on TAP. The purpose is to make the Notice Committee known to other Analysts as a resource. If there is a newspaper article published about the Notice Committee please make a copy and get it to Jim so that he can pass it on to the person that is responsible for putting out their newsletter. TIGTA is coming out with a report that is going to have a section on program improvement. Communications get a good write-up and that makes the Exams section very happy. That is something that is real important that shows what the committee have done for our



program. Jim impressed upon the members to take credit for that.

### **DAT for Forms (FAT) Report**

Lee Stieger stated that maybe we need to take another look at the (Forms Assessment Tool) FAT. After extensive conversation on the FAT and the DAT and how to approach the matter Max proposed that the current subcommittee go and re-look the FAT then report back the committee. Chuck Tice has volunteered to work on the subcommittee with Lee, Max, and Ben. Sidney proposed that as the committee goes back to take another look at the form to confer with Bob Erickson to solicit input on what makes a good form. Max would like to have the subcommittee's input by May 1.

### **Form 886-H HOH**

Dave stated that David Jones, Ben Chapman and Dave Meister will have it scored within the next two weeks.

### **Closing Remarks/Adjourn for the Day**

The members that went on the print tour shared the experiences with the tour. Ben Chapman suggested that the tour can be eliminated unless we are going to have a face to face there. Chuck Tice re-capped what was discussed and asked if anyone had any questions. The meeting was adjourned at 4:45pm MT.

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## **Thursday, April 17, 2008**

### **Welcome/Announcements**

Lee Stieger opened the meeting by wishing everyone good morning. Steve Fulkrod announced that Express Shuttle will pick you up from downtown if you make a reservation 24 hours in advance. Chuck announced there is a late check-out of 12:30 for anyone that needs it.

### **Subcommittee Review**

Lee mentioned that we need to be aware that 8 members are rotating off the committee this year which leave only 4 two year members with any experience. This leaves the committee in bad shape for the coming year. Jim Cesarano volunteered to do some training by phone if he need to. Max suggests that we assign a DAT to the new people and have them score a notice and he will work them through it to ensure they understand. Dave Jones suggested that the Chair of the committee draft a letter about the state of this committee by October or November 2008.

### **Document Assessment Tool (DAT) Subcommittee**

Lee will be filler on the DAT team if the subcommittee has a hole when scoring notices.

### **Dynamic Project Team (DPT)**

Mike Peleg has sent a response and the committee is satisfied with that response. Jim is going to report to Mike, if there is anything



else he wants done he can send it to them. The only thing left is the DAT scoring. Lee will send a memo to Mike asking is there anything else that he need for us to do.

### **Targeted and Improved Communications**

There was a PowerPoint Presentation created and used to educate the Notice Improvement Office. Where do we go from here? Jim stated that there is no plan to adopt direct marketing techniques. Sallie asked is there someone that we can formally send this document? Sidney responded with send this to him and he will get a response drafted. This subcommittee is now closed out.

### **Vision Impaired (TIGTA) Project**

The memo for the Vision Impaired was sent to Program Owner. We received a letter back which stated that a memo has been sent to David Krieg and Julie Garcia because it was out of the purview of the Program Owner. We are still waiting on something further from them. Lee sent a memo to David and Julia and still has not received anything back. Sidney will follow-up on this when he gets back to the office.

### **Combined Forms & Testing Project (CF&TP)**

We received a letter from the Program Owner in January. Lee sent a memo to Barbara Powell requesting a meeting. There is a meeting set for 13 May 2008 at 10:00am EST. The subcommittee is made active. The description of the subcommittee may change. Jim stated that this will be a good meeting to showcase the testing analyst about what you can do to help them. There will be a call set up prior to the call with the Testing Office. The parties participating are the CF & TP subcommittee. The pre-call is scheduled for 10am EST on 6 May 2008.

### **DAT for Forms (FAT)**

Discussions were held 16 April 2008. Please refer to pg 3.

### **Insert Report**

Davie Meister has drafted a report that has been forwarded. The lead now has it. We are currently waiting for feedback.

### **Insert Project**

The committee received some 13 notices from Ann Gelineau; she has also attached three questions that she would like for the committee to answer while scoring these notices. She wants you to approach this as citizens receiving this notice; how valuable is the insert that accompany it? The three notices that will be looked at today are the CP 12, CP 14 and the CP 161.

### **Insert Project Breakout**

Lee suggested that a form be created so that after a notice is reviewed the comments are similar by different teams. Dave Meister asked what inserts is required by law. Jim answered that none were required by law. Sallie asked if it is appropriate to invite the leads for the team to our call. There was an extensive conversation on how to develop this form. It has been decided by consensus that the



cost effectiveness is somewhere on the form. It is important to at least have comments on the form. Remember your value to the team is that you represent the interest of the taxpayer. There will be other stakeholders but your main role is to represent the taxpayer.

Sidney Gardner asked if the Notice Improvement Office had reviewed the DAT scoring tool. Have the standards been reviewed lately? Do they need to be changed? Are the standards still good?

Lee asked if there are more criteria that need to be addressed. Can some areas be deleted as they are not applicable? Are other items necessary to be added?

Jim asking if you are recommending that it is a total overhaul. Maybe look at it and make a recommendation to make a change to the DAT scoring standards. Dave suggests that we make some minor changes and make recommendations for years to come. Sallie asked, do you think the entire committee have the standardization scoring or just score it for a taxpayer point of view.

Lee stated that we should make sure that the DAT doesn't contradict the standardization guide. Lee stated that we don't want to review the DAT standards until we receive the standardization guide from the Program Owners.

### **DAT Review**

Chuck Tice reviewed the Document Assessment Tool (DAT) which can be found on TAPSpace. He explained the process how the Notices are scored and how the subcommittee come together to norm their scores.

Jim brought up an issue from a SME. The SME states that if the same people score the after, then they are going to come to the same conclusion. Jim suggested that the team that has done the after score should be different than the team that did the before score. Lee stated that the teams will shuffle teams periodically to break up the dynamics of one team.

Jim is hoping to open up the avenue of getting more before and after, especially with the DPT this year.

Dave Meister suggested that the committee have three teams of 4 instead of four teams of 3. He stated that he has had more success when it comes to norming scores when there are four members of a team. There is a consensus that it is three teams of four and you need three team members to norm. If there is an issue with getting three members then Lee will fill in.

### **DAT Scoring Standards**

Dave Jones discussed the letter grades for DAT scoring. He and his subcommittee created a document that outlined the criteria for B, C, and D. He explained the criteria for an A and an F then B, C, and D



will fall somewhere in-between.

Steve suggested that if we use this internally with TAP then this is good. If we are trying to write something up for the IRS then he is not too sure that it can be done. Lee stated that we are just going to use this to help the committee in doing the scores. It has been accepted to be used internally only.

### **DAT Scoring**

Sallie passed out a spreadsheet which has the priority list of Notices that needs to be scored. Sallie asked Jim why the 500 numbered notices are so high on the priority list is when they have already been scored. Jim stated that it is being held by the Notice team to work on when they get around to it. They do not have to be re-scored.

Chuck is the lead for Team 1 which consists of Max and Lee. Ed is the lead for Team 2 which consists of Neal and Ben. Dave Meister is the lead for Team 3 which consists of Dave Jones and Steve.

### **Closing Remarks/Adjournment**

Chuck Tice recapped the events of the meeting. The meeting adjourned at 4:50pm.

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## **Friday, April 18, 2008**

### **Welcome/Announcements**

Lee called the meeting to order and welcomed everything to the last morning of the meeting. He thanked Sidney Gardner for attending the meeting.

Sidney re-stated that now that he is back from his detail he will be committed to this committee. He thanked them for inviting him to the face to face. He stated that he may not be able to give an immediate turn around, but he will respond. He stated that it is up to the committee how they want to send responses up to his office. He is happy with just an email but if something has to go outside their office it may have to be in a formal memo.

Lee passed out the meeting satisfaction surveys and asked that the members complete and turn in before they leave. He also stated that if the score is a 3 or below to please add a comment.

Max wanted to thank the committee for supporting him while he was the chair of the Notice Committee. This is his last year and stated that it has been a real pleasure to have worked with everyone.

Dave Meister stated that out of the three years he has been on the committee he has not seen any response on any of the Notices scored. He mentioned that it would be nice to know if any of the Notices have been changed based on the committee's input. Even if



they decide not to use their comments just let them know thank you but we are not going to use your suggestions would be nice.

Sidney agreed that the committee should be getting information back on what has occurred regardless of a change or not. He also mentioned that you will start getting more interaction on the scores from the Notice Analyst.

Dave Jones questioned if there is any way the committee can get a tracking sheet on the notices scored. Lee stated once the DAT scores are sent forward the committee is done, unless they come back with questions. Sidney will commit to giving a status on the monthly conference calls on all notices that have been forwarded.

#### **DAT Team Report Out**

Lee asked if there were any questions or issues doing the DAT scoring and if they have used the new standards? The new standards should only be used for norming or personal information as we go through. Dave asked if it was possible to send an original notice when the committee receives them. Sallie stated that the committee get the notices is the way she receives them.

#### **Chair's Wrap Up**

Lee reported that Sallie is going to get the insert report out by next week. The chairmen of that subcommittee need to get the information to her and anyone else on the committee that have comments get it to Lee or Sallie this week. At that point we will formalize or Insert Project Team.

On the Combined Forms and Testing remember that there is a call on 13 May to formalize the presentation to Barbara Powell and her team.

We will be setting up a call with Bob Erickson for the FAT subcommittee and from that call they will go back and re-adjust that form.

There will also be reconstructing of the DAT three 4 team members. There were discussions on the norming process and the consensus is that there needs to be three people to norm scores.

Nancy Ferree stated that it is up to the committee to call and encourage people to get involved if they are always missing the calls.

Lee suggested that the members put in a plug with their area committee members to switch over to the Notice Committee.

There were discussions on eliminating the print site tour. Many members agree that the print tour was very informative to them and help them to understand the insert project better. A couple members felt that if it is valuable to have the face to face earlier in the year then the print site tour is less important. This will be talked



about at a later date.

Dave Jones asked Sidney if they can use former TAP members to test surveys on. Sidney will research and get back to the committee. He thinks that would be a good idea.

#### **Closing Remarks/Survey/Adjournment**

Chuck Tice recapped the meeting and wished everyone a safe trip back home. He also mentioned that you see on TAPSpace the success stories for what the Notice Committee has done.

Nancy mentioned that she was glad that Dave Meister spoke up to Sidney about not getting responses back from the Program Owners. Dave Meister stated that he has noticed in the last couple of years the Program Owners have progressed with the input and working with the committee. Lee Stieger is going to send an email to Bernie Coston regarding the meeting room situation. He feels that we could have paid for a meeting room with the amount we spent in cabs to get to the IRS building. Sallie acknowledged that Neil Mitchell, Ed Uhrig, David Jones, Joe Hurr, David Meister, Max Scott, Howard Stahl and Lee Stieger will be rotating off the panel this year and she will truly miss them. She thanked them for all of their hard work and time put in to the committee. He doesn't think it is advantageous to the IRS to have the meetings in an IRS building. The meeting was adjourned at 11:00am.

**Next Meeting is a teleconference on May 21, 2008 at 12:30pm EST.**

**\*Certification: These minutes were approved by the committee by consensus on May 21, 2008.**





**Taxpayer Advocacy Panel (TAP)  
IRS Notice Improvement Issue Committee**

**Meeting Minutes (Teleconference)  
March 19, 2008 at 12:30PM EST**

**Designated Federal Official (DFO)**

Nancy L. Ferree, TAP Program Manager, Plantation, FL

**Members Present**

Carolyn Adams-Dodds  
Ben Chapman  
Steve Fulkrod  
David Jones  
David Meister  
Neil Mitchell  
Max Scott  
Lee Stieger  
Chuck Tice  
Edward Uhrig  
Norma Woodard

**Members Absent**

Joe Hurr  
Howard Stahl

**Staff Present**

Anita Fields, Secretary  
Sallie Chavez, TAP Analyst  
Jim Cesarano, IRS Program Owner

**Guest(s) Present**

There were not guest present.

**Welcome & Roll Call/Quorum**

Lee Stieger opened the meeting and welcomed everyone. Ben Chapman asked if Paul Colombo was off TAP or off Notices. Lee stated that he has just been moved to another issue committee, but is still a part of TAP. Dave Meister also mentioned that Paul has agreed to continue to work on the 886 with his subcommittee.

**Comments from Program Owner**

Jim reported that Michael Peleg sent a response back on the penalty letters. Jim has forwarded that to Sallie. There are a couple of requests for DAT scores; two has been done on notices and one still remaining on Pub 3498 which is going to be redesigned. There was information that came in regarding the stuffer. Jim stated that during the last meeting he mentioned getting a memo done as quickly as possible and take the lead from the stuffer team with what their direction and instructions are on how they want to use the TAP. They want to find out some things from external stakeholders. There



are four questions: (1) is there any value added to the IRS including a blank tax form, i.e., F. 1040, or tax form instruction booklet with a notice? (2) We do not send you this material and you need a blank form, or need to review an instruction booklet - how would you obtain the necessary material? (3) Is there any value to the IRS including other forms or schedules and their related instructions - such as Forms 2210 or 2220 - Underpayment of Estimated Tax by Individuals or Businesses? (4) Is there any value added to the IRS including Publications with a notice? If we don't include these Publications and you need to review one - how would you obtain the necessary material? My suggestion to you is, as you are preparing the memo on the compliance notices think of how you can work the answers to these questions in. Sallie will send the response from Michael Peleg and the four questions from Ann out to the committee.

Dave Meister stated that these four questions that the stuffer subcommittee is what they have been working on for the last two years. Sallie will forward to Jim the initial recommendation that the subcommittee prepared regarding the stuffer project.

#### **DAT Standards**

Ben Chapman reported for Dave Jones. There have not been any thing new since last month and will have some recommendations for the committee to look at next month during the Face to Face.

#### **FAT Update**

Lee Stieger sent out the form and the standards to the members of the Ad Hoc Committee Chair and Vice Chair. He is still waiting on a response. He is going to follow-up on it this week.

#### **CP-220**

Ben Chapman reported that it was completed last month and have been forwarded.

#### **Form 3498A**

Max reported that the form has been scored and the subcommittee will get together and get the scores finalized next week.

#### **Letter from Program Owner**

Lee Stieger reported the committee received responses back from the program owners, the letters were sent out as a pre-read. The first letter dealt with the testing memo that was forwarded up. It stated that they will arrange a meeting with the committee in April to discuss the committee's expectation and how we can be involved in the process of conducting forms and notice testing. Jim informed the committee that the meeting in April with Barbara Powell has been cancelled. Lee asked if there was a chance if Barbara could possibly get on a conference call. Jim wants Sallie to send him an email stating the possible dates and times and he will try to set it up. The next letter was on the Visual Impaired Recommendation. Sydney informed the committee that they need to go to a higher level. It is out of the scope of correspondence redesign. There was a memo sent to several people in the area that will work with it. They might



contact the committee to discuss this, going through Jim. Lee stated that he don't know where it will go. Jim stated that he has not received anything regarding the memo as of yet. He mentioned that it go the people that can make moves on it several levels above Sydney. Lee Stieger stated that this should be tabled; he asked what the other members think. Ben Chapman thinks that it should be followed up on. Nancy Ferree that the committee can draft up a memo and respond and she can forward it to whomever it goes to. The committee decided to respond to the memo.

#### **Face to Face Meeting**

Sallie Chavez reported that the Face-to-Face will be held April 16-18, 2008 in Salt Lake City, UT. The morning of the 16th will be a tour of the print site in Ogden, UT for the members that have not toured it yet. You will need a picture ID for the tour. Sallie will get with everyone to let them know if there is anything needed. We will be staying at Homewood Suites in Salt Lake City.

Lee Stieger asked if anyone have anything that is not on the agenda and would like to add something, send an email to him or Sallie and they will see about adding it. Ben Chapman volunteered to join the sub committee with Dave Meister to work on the 886 HOH. Sallie will send Ben the information from the previous subcommittee call to bring him up to speed.

#### **Closing Remarks/Survey/Adjournment**

The minutes from February 20, 2008 was approved by consensus. Lee Stieger thanked everyone for attending and the meeting was adjourned at 1:35pm EST.

**Next Meeting is the Face-to-Face in Salt Lake City, UT April 16-18, 2008.**

**\*Certification: These minutes were approved by the committee by consensus on April 16, 2008.**



**Taxpayer Advocacy Panel (TAP)  
IRS Notice Improvement Issue Committee  
Meeting Minutes (Teleconference)  
February 20, 2008 at 12:30PM EST**

**Designated Federal Official (DFO)**

Nancy L. Ferree, TAP Program Manager, Plantation, FL

**Members Present**

Carolyn Adams-Dodds  
Ben Chapman  
Steve Fulkrod  
Joe Hurr  
David Jones  
David Meister  
Neil Mitchell  
Max Scott  
Lee Stieger  
Chuck Tice  
Edward Uhrig  
Norma Woodard

**Members Absent**

Howard Stahl

**Staff Present**

Anita Fields, Secretary  
Sallie Chavez, TAP Analyst  
Jim Cesarano, IRS Program Owner

**Guest(s) Present**

**Welcome & Roll Call/Quorum**

Lee Stieger opened the meeting and welcomed everyone.

**Comments from Program Owner**

Jim Cesarano reported that since the last meeting we received three documents to DAT score. The CP 220 has already been scored. Michael Peleg would like to get the CP 220 and 210 re-scored including the penalty and interest section. We just received the new prioritized list of notices to score from Michael Peleg. The response to the August memos has been forwarded and is available.

**886H Call**

Jim reported that there was a meeting with the team on the HOH and the DEP and there is a meeting schedule on EITC. The Subject Matter Expert (SME) asked the team to do a little extra work on the HOH and re-score it with the full documentation. Ben shared that there is a call scheduled for this Friday 22 February 2008 with Sallie and the SME for the 886 HOH EITC.



### **Insert (Stuffer) Project**

Dave Meister reported that the team is very close to having a document ready to elevate. Steve Fulkrod mentioned that the document went out last night to the subcommittee, February 19. Jim suggested that the document should be sent out to the team, to see how it works with them. Jim passed along that Debra Lopez wants the review to go to the team and then it will be followed up on. Jim is in the process of getting Debra Lopez to attend the face to face meeting. Steve stated now that the first group of notices with inserts is complete; there is a process that is easier to work with. Dave Meister informed the committee that J.T. Wright is working with the subcommittee on these stuffers as a member of the public. Jim mentioned that since the inserts for CP 501 and the compliance letters is a hot button for Nina, that it would be an important thing mentioned in the memo as it is forwarded. Lee Stieger asked that the memo be sent to him and Sallie before it is sent to Jim.

### **DAT Standards**

Dave Jones reported that there has been nothing substantial done, he feels that there be some sort of guidance given out on how to score the notices. Lee stated that he will have something in writing to be distributed next week to the members on the subcommittee. There is going to be some sort of training for DAT scoring at the face to face. Jim suggested that it might be helpful to do scoring as a group, so that it can be standardized.

### **FAT Update**

Max reported that the committee has used it to score some forms and some people felt it was of very little value. It was fine with simple forms, had issues with complicated forms. There were suggestions to make a few changes and they have been made. The subcommittee agrees with the form as it is. The next step will be either to give it to Jim Cesarano for a formal review or pass it on to the Tax Forms and Pubs issue committee and go forward. Ben suggested that it be sent to the Forms and Pubs committee. It was decided with consensus for Lee Stieger to speak with Ken Wright and Al Rodriguez the Vice Chair and Chair of the Forms and Pubs Committee before making a final decision.

### **CP-210**

Chuck Tice reported he is waiting on a couple more scores from the other members on the subcommittee; a subcommittee conference call has been scheduled for Monday February 25th to finalize scores. Chuck will have something to report on next month's call.

### **CP-220**

Completed and forwarded.

### **Form 3498A**

Max reported that nothing has been done, but has set a completion date of March 16, 2008 for the subcommittee. There will be a report at the Face to Face in Salt Lake City.



### **Face to Face Meeting**

Sallie Chavez reported we will meet in the IRS building in Salt Lake City, Utah and staying in a Homewood Suites. There will be a tour of the print site in Ogden the morning of the 16th for first year members.

### **Closing Remarks/Survey/Adjournment**

The December and January meeting minutes have been approved as written by consensus. Dave Meister asked opinions concerning the stimulus package. It was a discussion and he went away with the answer that if you file an extension, you will still received the stimulus payment.

Lee thanked everyone for attending and reminded them to complete their survey. The meeting was adjourned at 1:30pm EST.

### **Next Meeting March 19, 2008 via Teleconference @ 12:30pm EST**

**\*Certification: These minutes were approved by the committee by consensus on March 19, 2008.**