

2005 Meeting Minutes W&I Notices Issue Committee Meetings

- December 8, 2005
 - September 1, 2005
 - August 11, 2005
 - July 7, 2005
 - May 20-21, 2005
 - April 7, 2005
 - March 3, 2005
 - February 3, 2005
 - January 6, 2005
-

Wage & Investment Reduce Taxpayer Burden (Notices) Meeting Minutes

December 8, 2005

Participants (Panel Members):

- Sonny Kasturi
- Allena Lu Kaplan
- James Wright

Not Present:

- Michael Guthman
- Martin Romeril
- Sanford Searleman
- Mary Suther
- Warren Wong

Staff Members:

- Sallie Chavez (Recorder)
- Inez De Jesus (Acting DFO)

Guests

- James (Jim) A. Cesarano, Tax Analyst, Wage & Investment, Notice Improvement Office, Program Owner Representative
- Geoff Gerbore, Tax Analyst in Exam Compliance EITC
- Ferd Scheider, TAP Member (Former Notice Committee Member)

Welcome

Committee Chair Sonny Kasturi welcomed everyone. This will be a short informational meeting. It will be the last teleconference until the Annual Meeting next month.



Roll Call

Analyst/Recorder Sallie Chavez took the roll call and quorum of four (4) was **NOT** met.

Chair Update

Committee Chair Sonny Kasturi reported on the previous Joint Committee Meeting. Several issues were discussed and there was discussions about the Annual Meeting. New members are being advised of their new issue committee assignments. Committee Member J. T. Wright will head the issue committee meeting in D. C. next month since Committee Chair Kasturi will be moving to another committee.

Pending DAT scoring results

TAP Program Analyst Sallie reported that all DAT scoring for the CP500 demand series has been completed and the results have been forwarded to Program Owner Ann Gelineau. Committee Member and DAT Subcommittee Chair Don Miller is moving to another issue committee so a new Subcommittee chair will need to be appointed for the next year.

Sub-Committee Reports

- Strategy Meeting Update
Committee Member J. T. Wright reported on his trip to D. C. to participate in this program owner meeting.
- Goals and Objectives
Committee Member J. T. Wright stated that the committee accepted the Goals and Objectives developed by the subcommittee. He feels this should be brought up with the new committee members so they can buy into the document. Suggestions it be discussed at the Annual Meeting.
- NPITT Notice Elimination Update
Committee Chair Sonny Kasturi reported on his participation on the NPITT Notice Elimination meeting.

Work Expectations

Program Owner Representative Jim Cesarano reported on the following:

- His office has been reorganized again. It is now called Notice Improvement Office. It merged the W & I and SB/SE SPOC along with Notice Support. The new organizational chart will be distributed at the Annual Meeting.
- He would like to meet with the committee after the Annual Meeting to discuss and coordinate the Goals and Objectives.
- A thank-you memo is being prepared to the committee for the focus group they participated with at the Face-to-Face meeting in Atlanta.
- DAT scoring on the Demand Series Notices is being distributed. Thank you memo is being prepared.
- There were plans to hold a DPT on the CP23, 24 & 25 however that may not happen. The DAT scores have been distributed.
- The Penalty and Interest DPT is finishing up. There will be more information about this at the Annual Meeting.
- Sidney Gardner will be the new Program Owner for the Committee.
- Funding has been cut. Do not know exactly how that will affect the processes.

Program Owner Jim Cesarano introduced Geoff Gerbore. Geoff is a Tax Analyst in Exam Compliance EITC. He is working on the CP79, which is an EITC recertification notice. It is sent to taxpayers when



EITC has been disallowed. Treasury Inspector General for Tax Administration (TIGTA) has done two (2) reports and found this notice to be problematic. Right now, there are five (5) versions of the CP79. He would like all to be scored. But more than that, he would like to work with the group that scores the notices and conduct a focus group. Committee Chair Sonny Kasturi suggested this notice be used as a live example at the Annual Meeting. Geoff would like this subcommittee to have from four (4) to eight (8) members participate in this project.

Open Forum

Committee Member J. T. Wright asked who will lead the strategy meetings with the changes to the leadership. Program Owner Representative Jim Cesarano said Ann Gelineau will probably still lead the meetings. Sidney Gardner will be the Program Owner and he will be the Program Owner Representative.

Meeting Close

Next Meeting will be the Annual Meeting in Washington, DC starting on January 10, 2006.

These minutes were approved by the DFO on 12/21/2005.



Wage & Investment Reduce Taxpayer Burden (Notices) Meeting Minutes

September 1, 2005

Participants (Panel Members):

- Michael Guthman
- Sonny Kasturi
- Allena Lu Kaplan
- Don Miller
- Neil Mitchell
- Joyce Natter
- Martin Romeril
- Ferd Scheider
- Sanford Searleman
- Virginia Symonds
- R. Jeana Warren
- Warren Wong
- James Wright

Not Present:

- Anthony DiMartino
- John Hollingsworth
- Douglas Wilhelm

Staff Members:

- Sallie Chavez (Recorder)
- Nancy Ferree (DFO)

Guests

- James (Jim) A. Cesarano, Program Analyst, Wage & Investment, Single Point of Contact (SPOC) Representative
- Barbara Delbene – Chicago, IL – National Community Tax Coalition

Welcome

Acting Committee Chair Sonny Kasturi welcomed everyone, as this is his first meeting as the acting chair. Chair Kasturi reported on the Joint Committee Meeting last month. The following was discussed:

- TAP will participate in Town Hall Meetings with National Taxpayer Advocate Nina Olson.
- Communication Committee will work on TAPSpeak.
- Two recommendations from Area 3 were accepted to elevate and one was rejected.
- Annual Meeting Agenda was discussed and finalized.
- Self-assessment and presentation for the Annual Meeting is required by the Joint committee by Sept 6.

Roll Call

Analyst/Recorder Sallie Chavez took the roll call and quorum of eight (8) was met.



Review/Approval of Prior Meeting Minutes

The meeting minutes were approved by consensus.

Sub-Committee Reports

- Document Assessment Tool (DAT)

Sub-committee Chair Miller reported he and Analyst Chavez discussed the notices that need to be scored. They selected five (5) of the CP500 series and assigned them to teams. An email was sent out to all members advising them of their teams and what notices they will be scoring. Most of the notices have more than one version. Analyst Chavez will mail out "hard copies" to each team by Friday, September 2, 2005. It was request that the committees score the notices and come to consensus on the scores by the end of October and provide the excel spreadsheets to both Sub-committee chair Miller and Analyst Chavez to be discussed at the Annual Meeting in Washington in November.

The CP25 was assigned to Team 2 at the Face-to-Face meeting in Atlanta and was never completed. Sub-committee Chair Miller asked that Committee Members Guthman and Wilhelm score the notice and get the results to the Analyst as soon as possible. Committee Member Guthman asked to have the CP25 notice emailed to both committee members.

Acting Committee Chair Kasturi asked Subcommittee Chair Miller to send him a list of notices that were scored this year.

Two (2) of the teams lost their leads. Committee Member Guthman will lead Team 2 and Schneider will lead Team 4.

- Goals and Objectives

Sub-committee Chair Wright said he sent out a revised version of the Goals and Objectives just before the meeting. He only received comments from Committee Member Guthman. He thinks it is ready to go. One member suggested to add in the section called Goals and Objectives to include participation in the notice testing.

Acting Committee Chair Kasturi requested that the document be sent to Analyst Sallie Chavez to be forwarded to SPOC Representative Cesarano for IRS Program Owner's comments. SPOC Representative Cesarano agreed to get back with comments.

- Referrals

Sub-committee Chair Searleman sent out an email covering the referrals his sub-committee had. They were discussed and the committee agreed with the sub-committee's decisions to drop all the issues.

- Annual Self-Assessment

Acting Committee Chair Kasturi discussed the Annual Self-Assessment. He has emailed the Self-Assessment to all members and would like their feedback. The deadline was today but he would like to have everyone's input no later than tomorrow (September 2, 2005). This Self-Assessment will be the basis for his presentation at the Annual Meeting.

Comments from SPOC Representative

SPOC Representative Jim Cesarano reported the following:

- The CP79 group of notice needs to be scored based on a TIGTA investigation. There are four (4) versions of the notice to be scored.
 - TIGTA Version



- Exam Version
- SPOC Version
- Legal Version

The committee members who score these notices will also be part of a focus group to discuss why they scored the way they did. Volunteers were solicited for this project. Committee Members Kaplan, Romeril and Mitchell volunteered. It would be better to have at least five (5) on this sub-committee. Analyst will contact members who are not on the call and ask if they would like to participate in this subcommittee.

- There has been no contact from the Penalty and Interest DPT. SPOC Representative Cesarano found out that they were dealing with another TAP Committee. He has advised them that this committee should be working on the Penalty and Interest as they had been involved in it previously. They will work with the committee. They would like to have the before and after versions of the Penalty and Interest scored using the DAT as well as feedback.
- Upcoming Work:
 - Simplification of Penalty and Interest – on going.
 - Notice Elimination – on going.
 - Simplification of CP 23, 24 & 25.
 - Combine notice testing with forms.
 - Notice Stubs – on going.
 - Electronic email of notices sent to Practitioners – Commissioner's plan.
- Notice elimination is meeting face-to-face to come up with a methodology. They are gathering documents on the Correspondex letters.

Detroit Print Site Tour

Acting Committee Chair Sonny Kasturi lead a discussion about the tour. All the members thought the tour was helpful. A couple of members though that it may have failed the cost-benefit test since it was not coupled with a Face-to-Face meeting. It was discussed that new members should go on this tour as soon as possible. It was suggested that the tour could be part of the face-to-face meeting.

Meeting Close

Committee Chair thanked the non-returning members for their participation on the committee. SPOC Representative Cesarano also added the thanks from the SPOC.

Next meeting will be the Annual Meeting in Washington, DC, November 2 - 5, 2005.

These minutes were approved by the TAP Notices Issue Committee via email on 9/26/2005.



Wage & Investment Reduce Taxpayer Burden (Notices) Meeting Minutes

August 11, 2005

Participants (Panel Members):

- Anthony DiMartino
- Dick Greenberg
- Michael Guthman
- Sonny Kasturi
- Allena Kaplan
- Don Miller
- Neil Mitchell
- Joyce Natter
- Ferd Scheider
- Sanford Searleman
- Douglas Wilhelm
- Virginia Symonds
- James Wright

Not Present:

- John Hollingsworth
- Martin Romeril
- R. Jeana Warren
- Warren Wong

Staff Members:

- Sallie Chavez
- Nancy Ferree (DFO)
- Jenny Reyes (Note taker)

Program Owner

- James (Jim) A. Cesarano, Program Analyst, Wage & Investment, Single Point of Contact (SPOC) Representative

Welcome

Committee Chair Mike Guthman welcomed everyone.

Roll Call

Program Analyst Sallie Chavez took the roll call and quorum was met.

Review/Approval of Prior Meeting Minutes

The meeting minutes of July 7, 2005 were approved by consensus.

Sub-Committee Reports



- Notice testing
Ferd observed three testings in Cincinnati, Ohio. (CP 161 notice and simple notice) – No one from IRS in attendance. Money well spent.

Allena – Observed testing in Los Angeles. She rec'd copies of notices to review. IRS staff was present. (only one day) - three interviews, very impressive, the three interviews went well. What needs work—What needs work?—calculating interest. Process is very complicated. The interviewers were very professional.

Jim Cesarano stated DPT P & I Team is forming soon.
- NPITT Notice Elimination Meeting
Douglas Wilhelm reported.
- Notice Focus Group Report (Atlanta Tax Forum)
J.T. Wright reported. Presentation of notices CP501,CP504. Three sessions, his session had 20 people present.
- Notice Focus Group Report (NY Tax Forum)
Sonny Kasturi reported. Session was well conducted. 3 people in his group.
- Notice Committee Goals and Objectives
J. T. Wright sent draft of goals and objectives. Allena and Don participated in creation. Allena states goals are practical and can be met. Sandy stated well done – Vision and Mission paragraphs may be too long. Be sure to run spell check. Sonny stated – On Vision – Suggest adding easy to understand and act on.

Remove “all Taxpayers” from mission. Give one week to respond in writing to sub-committee by August 18, 2005.

Sonny – Asked where do we go from here?

J.T. stated that certain IRS staff would be identified to collaborate with us. Mike stated TAP Director is creating a performance measures document for all of TAP. A copy should go to him. Allena suggested a copy be sent to Jim Cesarano (Program owner). J.T. suggested Mike take to Joint Cmte and eventually to Nina Olson. Mike G. Said this could be focus of Annual Report. Tony stated this is a very good job! Keep recommendation as simple as possible. J.T.'s objective was to have this as a living document.

DAT Scoring (Sonny's group)- Don reported a flaw in DAT scoring – some questions have serious deficiencies – Sub Committee discussed at length. Recommendation is to write comments in section to explain serious deficiency and notice may need to be revised.

Sallie advised all returning members about the Detroit Print Site Tour August 17, 18, 2005- Mike, Ferd, Allena, Sandy, Jim, and Sallie would attend. Ferd invited all attendees to meet in the hotel lobby at 6:30pm on Wednesday for dinner outing.
- Detroit Print Site Tour August 24, 25, 2005
Sonny, Don, J.T. Martin, Douglas, Neil and Nancy will attend. John Kilcoin is the tour leader, picture I.D. needed.



The tours will begin at 8:30am and end at approximately 11:30am. Members will have time to transport to the airport for the travel home.

- Jim Cesarano
No new assignments at this time.
- Writing Standards
Mike Guthman will complete and send to Jim Cesarano/Sallie /Nancy.

IRS employees Mobley and Bailey (EITC letters at Face-to-Face Mtg in Atlanta) – Sonny had one comment about a section that was not clear. Ms. Mobley and Ms. Bailey will use whatever feedback they can.

- Notice NPIIT
Jim C. advised about meeting in Washington, DC. Next week meeting in Austin, TX (2 weeks) will have phone meeting due to budget – Will send invites when possible.

Merge of W&I and SB/SE will affect panel. Sidney Gardner is SB/SE SPOC. Further details are not final yet.

Sallie – Mentioned usability testing next week in Towson, MD and Atlanta, GA. She asked that whoever could attend should let her know.

Sandy – Incoming referrals committee. No current referrals.

A short discussion on TAPSPEAK by all members was held. Some members indicate they still have problems accessing and using TAPSPEAK.

Meeting Close

The meeting was adjourned at 1:07pm.

Next meeting is scheduled for September 1, 2005, Noon EDT by teleconference.



Wage & Investment Reduce Taxpayer Burden (Notices) Meeting Minutes

July 7, 2005

Participants (Panel Members):

- Anthony DiMartino
- Dick Greenberg
- Michael Guthman
- Sonny Kasturi
- Allena Lu
- Don Miller
- Joyce Natter
- Martin Romeril
- Ferd Scheider
- Sanford Searleman
- Virginia Symonds
- James Wright

Not Present:

- John Hollingsworth
- Martin Romeril
- Neil Mitchell
- R. Jeana Warren
- Douglas Wilhelm
- Warren Wong

Staff Members:

- Sallie Chavez (Recorder)
- Nancy Ferree (DFO)

Guests

- James (Jim) A. Cesarano, Program Analyst, Wage & Investment, Single Point of Contact (SPOC) Representative

Welcome

Committee Chair Mike Guthman welcomed everyone.

Roll Call

Program Analyst/Recorder Sallie Chavez took the roll call and quorum of nine (9) was met.

Review/Approval of Prior Meeting Minutes

The meeting minutes were approved by consensus.



Sub-Committee Reports

- Document Assessment Tool (DAT)

TAP Program Analyst reported that she has received several “final” notices that need to be scored. She has contacted subcommittee lead Don Miller and he has advised her to assign them as fairly as possible.

Committee Chair Mike Guthman reported the IRS has responded back to the committee about the DAT Excel Spreadsheet that Committee Member John Hollingsworth created. They are very excited about it and want to use it. They want to make a couple of enhancements and will send the committee the final version when it is complete. The enhancements are minor and should not affect the use of the spreadsheet. **He requested that the letter from the IRS be forwarded to all members.**

- Dynamic Project Team (DPT)

Committee Member Tony DiMartino reported on the DPT stub team conference call that he, and Committee Members J T Wright and Warren Wong participated. The IRS DPT asked the committee members for their input and recommendations. TAP Program Analyst said she had received samples and had sent these samples to the subcommittee yesterday.

- Incoming Referrals

There was no report. Committee Member Sandy Searleman said he would like to have a current copy of the subcommittees. **This revised list will be sent out to all members.**

- Notice Elimination NPIIT Conference Call

No report.

- Goals and Objectives

Subcommittee lead J T Wright reported the subcommittee was going to have a conference call next week to discuss the vision, mission and value statement for the group. Committee Chair Mike Guthman asked him to please have something for the committee a week before the August meeting.

Comments from SPOC Representative

SPOC Representative Jim Cesarano reported the following:

- A response has been received from Lois Bailey and Beverly Mobley concerning the focus group comments made at the face-to-face meeting in Atlanta.
- He is ready to write his report on the focus group he conducted at the face-to-face meeting in Atlanta. He would like an email from everyone if they have any comments that he did not capture from his presentation. Committee Chair Mike Guthman asked that members send their comments to him by next Thursday (July 14, 2005) and he will forward one email to SPOC Representative Cesarano with all the comments from the committee.
- There is a DPT for the notice stubs. They will be doing testing later in the year. The lead on this DPT is Linda Lightner.
- The “final” versions of the Collection Notices are ready to be scored.
- The charter for the Notice Elimination NPIIT has been sent out to NCAG. He explained some of the changes. The next meeting will be on July 14. There is a possibility of a meeting in



Washington, DC within the next four (4) weeks. There will be no formal presentation however, TAP will be invited to participate in the meeting.

- Carolyn Taverner who was the Director of Media and Publications is now the Assistant Deputy Commissioner for Operations. She is a supporter of reader focus writing.
- The SBSE SPOC and W & I SPOC have merged. He doesn't know how that will affect the committee.
- Mark Pursley was promoted to Customer Assistance, Relationship and Education (CARE). Media and Publications are under CARE.
- Subject Matter Expert Geoff Gebore has asked the committee to help him on working on the CP79. He is also working with the EITC Issue Committee. There was a TIGTA report on the CP79 stating it was unclear to taxpayers. There are four (4) version of the CP79 that he would like the committee to score.
 1. The CP79 that TIGTA looked at.
 2. The Examination Version.
 3. The SPOC Version.
 4. The Legal Council Version

He would also like to have a teleconference with the committee members who scored the notices. They may do usability testing later this year if there is funding available.

- There are funds available for a tour of the Detroit Print Site. SPOC Representative Jim Cesarano will get together with Committee Chair Mike Guthman, TAP Program Manager Nancy Ferree and TAP Program Analyst Sallie Chavez to discuss possible dates.
- The Penalty and Interest DPT conducted usability testing in June. TAP Program Analyst reported she had just received an email from DPT Lead Deborah Maxwell about usability testing scheduled for July. The testing will be in Los Angeles, Cincinnati, Montgomery, AL and Denver, CO. She asked if Committee Member Allena Lu in Los Angeles and Ferd Schneider in Cincinnati were available to observe the testing. They are. Further information will be forwarded to them for their attendance.

August Conference Call

Committee Chair Mike Guthman reminded everyone that the August conference call has been changed from August 3 to August 11 because the staff will be in training the first week in August. An email reminder will be sent to all committee members.

Additional Comments

Committee Chair Mike Guthman stated that he is required to write an annual report. He is asking the subcommittee chairs to assist him in writing this report.

Committee Member Dick Greenberg reported on a situation he had concerning a notice. He said he contacted the number on the notice and within five (5) minutes, he had his answer.

Meeting Close

Next meeting is scheduled for August 11, 2005.



Wage & Investment Reduce Taxpayer Burden (Notices) Meeting Minutes

*May 20-21, 2005
Atlanta, Georgia*

Participants (Panel Members):

- Dick Greenberg
- Michael Guthman
- John Hollingsworth
- Sonny Kasturi
- Allena Lu
- Don Miller
- Joyce Natter
- David Robinson
- Martin Romeril
- Ferd Scheider
- Sanford Searleman
- R. Jeana Warren
- Douglas Wilhelm
- Warren Wong
- James Wright

Not Present:

- Anthony DiMartino
- Virginia Symonds

Staff Members:

- Sallie Chavez (Recorder)
- Nancy Ferree (DFO)

Guests

- James (Jim) A. Cesarano, Program Analyst, Wage & Investment, Single Point of Contact (SPOC) Representative
- Betty Allen, LTA, Atlanta, GA
- Lois Bailey, EITC Redesign Team
- Beverly Mobley, EITC Redesign Team
- Jay Duffy, Program Analyst, Wage & Investment, Single Point of Contact (SPOC) Representative (via conference call)
- Deborah Maxwell, Dynamic Project Team Leader, Penalty and Interest (via conference call)



May 20, 2005
8:30 am - 4:30 pm

Welcome and Announcements/Roll Call

Committee Chair Mike Guthman welcomed everyone. It has been a while since the committee has met face-to-face. It should be a productive meeting.

Committee Chair Mike Guthman had a few additional items. He would like to discuss the workload. There does not seem to be enough work. Some committee members are not participating because the IRS is not giving enough time. SBSE committee chair contacted him because the SBSE program owners are asking SBSE committee members to review and work on notices. DFO Nancy Ferree said she had contacted Helene Bayder of SBSE about some SBSE notices. Helene has plans for SBSE to work on these notices.

The Annual Meeting is scheduled for November 2 – 5, 2005 at the Hyatt Capitol Hill. The Joint Committee is setting up a subcommittee to work on the agenda for the meeting.

Local Taxpayer Advocate Betty Allen welcomed everyone.

Committee Chair Mike Guthman thanked everyone for making the meeting arrangements.

Introductions

Everyone introduced themselves.

National Office Report

TAP Director Bernie Coston reported that he and his staff had a staff meeting last week in Chicago before the Joint Committee Meeting. This type of meeting will aid the staff in doing a better job in serving committee members.

The Annual Report was well received.

TAP Director Bernie Coston said the staff would look into taking the committee members to the print site in Detroit next year. This will give the members a better idea of what is involved in sending notices.

The week of May 23, all of TAP Director Bernie Coston's director report staff will be reviewing the 400+ applications received during the recruiting period. There are 35 – 40 vacancies.

May 20th, four (4) members of TAP are meeting with the Commissioner at 1:00pm to discuss the TAC closures.

TAP Director Bernie Coston discussed the Measures of Success of TAP. This will be broken down by staff and members.

TAP Director Bernie Coston discussed the new Communications Committee and how they are working to get the word out about the TAP.

Committee Chair Mike Guthman reviewed the Tax Forums. He said if there is a forum in a location close to you and you have the time to work at the forum, to contact their area staff.



Review/Approve Minutes of May 5, 2005

They were several corrections to the minutes. The minutes are approved, after corrections, by consensus.

Comments from SPOC Representative

SPOC Representative Jim Cesarano gave updates on the ongoing item. The CP500 series notices will be updated during a conference call later today. He is not sure if the final notices are ready to be scored. The Dynamic Project Team (DPT) on Penalty and Interest is also scheduled to be discussed later today during a conference call. There has been some usability testing and additional testing is scheduled.

The privatization of collection letters have gone through a number of revisions. They are not available to be released. They will be going through usability testing. He also stated that he could release it for the committee only when the program owners permit him to do so.

The Notice Elimination Charter was discussed at the last Notices Communication and Advisory Group (NCAG) meeting. They didn't finalize the charter. They made significant changes to the charter.

Single Point of Contact Ann Gelineau would like a member of this committee to work on a panel at the Plain Language Forum scheduled for sometime in November. He will get additional information closer to the event. It may coincide with the TAP Annual Meeting.

The Document Assessment Tool is very important. It provides the IRS with before and after scores for notices. It gives a diagnostic indicator of the notices.

SPOC Representative Jim Cesarano gave background on Form 872 and requested input from the group. Committee Member Mike Guthman led the discussion about the form language "Your Rights as a Taxpayer".

CP500 Series Notices Updates

IRS Analyst Jay Duffy (via conference call) reviewed the status of the Dynamic Project Team (DPT) who is updating the CP500 Series notices. These collection notices were revised last summer. They also conducted usability testing. The original revised notices did not get approval. The DPT reconvened to look at other Automated Substitute for Return (ASFR) notices in October. The DPT held conference calls in February to get input from stakeholder before going to the executives. The goal is to have these notices available for January 2006. The programmers may not be able to get them ready by then. The notices are longer than before (at six (6) pages). The tone of the notices is a concern. The executives want stronger language. The team wanted consequences if the taxpayer didn't reply. There was discussion about the delinquency notices as to whether there should be detailed information or summary information about the income received. For the CP503 (2nd notice), they were originally pushing to eliminate this notice however the next notice is sent certified and would cost more. They are no longer pushing for that.

What they are trying to obtain is a better look, better formatted, frequently asked questions (FAQ) and information about payments. In addition, they are adding how to go to tax court on the ASFR notices. Language is not a problem. The problem is with the programming. Now they are providing input to the executives so they can obtain the approval from the executives.

The one part of the notice that was not changed is the payment stub. There are plans to form a team to work just on the payment stub.

Hold off DAT scoring the final notices since they are still receiving corrections to the notices. Jay will provide the final notices to TAP Analyst Sallie Chavez as soon as they received approval.



Morning Wrap-up

Committee Chair Mike Guthman asked if the committee members had any suggested changes in the way the meeting is going. There was no response.

He asked if there were any other comments. Area 4 has some issues concerning notices. It was asked if they should come to our committee. They also asked about notices concerning EITC. They would like to know the process for these types of issues. DFO Nancy Ferree said that if it fits within the rewriting of a notice it would be sent to SPOC Representative Jim Cesarano to see if it's something the committee should handle.

EITC Exam Team

Beverly Mobley and Lois Bailey provided copies of four (4) notices that they wanted the committee to review. There was discussion about the notices and the comments about these notices were recorded. Highlights of the comments given include the following:

- If the IRS has information on the specifics, they should provide them to the taxpayer instead of having them guessing what the IRS has, e.g., on the income verification notice, state the problem identified by the IRS concerning qualifying child in the notice confirming qualifying child, since this is an account-specific notice.
- Consistency in terminologies should be followed, e.g., "maintaining your household" in lieu of "keeping up your home" on the filing status notice.
- Review and correct the notice on Schedule C, Business income to eliminate the confusion about profit reported in Schedule C deemed as unearned income.

Penalty & Interest DPT

Deborah Maxwell, Team Leader for the Penalty & Interest DPT addressed the committee (via conference call). The purpose of the DPT is to rewrite the Penalty and Interest statement that goes with notices. They want the statement to be easily understood by taxpayer. She will send the evolution of this document to TAP Program Analyst Sallie Chavez to be distributed to the committee members.

The revised form went through preliminary testing last week. The results were not what they expected.

Deborah reviewed the RRA98 requirements that Penalty and Interest statements had to be sent with notices. She would like help from taxpayers in determining what does the taxpayer want.

They are planning to test again in a couple of week. They are also planning a stakeholder meeting in a couple of weeks. TAP will be invited.

Spreadsheet Tool for DAT

Committee Member John Hollingsworth presented his spreadsheet to the committee that he has updated since he first introduced it to the committee. The original format was several pages long. This spreadsheet automatically takes the numbers and inputs them into the cover page.

This spreadsheet will be forwarded to the Program Owner as a suggestion.

TAP Program Analyst Sallie Chavez will forward the Excel Spreadsheet to all committee members.

Subcommittee Reports

Committee Chair Mike Guthman said that since there has not been very much activity within the subcommittee, he would like TAP Program Analyst Sallie Chavez to conduct a discussion about the subcommittees.



During the discussion, it was decided to provide a "job description" for each of the subcommittees. The Emergent Issues Subcommittee, NPIIT Subcommittee and Quarterly Strategy Subcommittee will be eliminated. The Referral Subcommittee will be renamed Incoming Referral Subcommittee and the Usability Testing Subcommittee will be eliminated and members will be assigned as needed by the Chair. Committee Chair Mike Guthman will ask for volunteers when usability testing is available for members to attend.

Closing Remarks/Adjourn for the Day

Committee Chair Mike Guthman advised everyone that the committee would meet at the Best Western Inn of the Peachtrees in the Peachtree Room tomorrow at 8:30am.

Meeting was adjourned.

May 21, 2005

8:30 am - 12:00 noon

Participants (Panel Members)

- Dick Greenberg
- Michael Guthman
- John Hollingsworth
- Sonny Kasturi
- Allena Lu
- Don Miller
- Joyce Natter
- David Robinson
- Martin Romeril
- Ferd Scheider
- Sanford Searleman
- R. Jeana Warren
- Douglas Wilhelm
- Warren Wong
- James Wright

Not Present

- Anthony DiMartino
- Virginia Symonds

Staff Members

- Sallie Chavez (Recorder)
- Nancy Ferree (DFO)

Guests

- James (Jim) A. Cesarano, Program Analyst, Wage & Investment, Single Point of Contact (SPOC) Representative

Welcome/Announcements

Committee Chair Mike Guthman welcomed everyone back. SPOC Representative Jim Cesarano showed



information about the Plain Language Forum he discussed yesterday. TAP Program Analyst Sallie Chavez will make copies and send to all members.

Breakout to work on DAT (Notice Scoring)

SPOC Representative Jim Cesarano gave a brief overview for the DAT. He reminded committee members that they need work on it and take it seriously.

TAP Program Analyst Sallie Chavez distributed notices for each of the DAT teams to score. She advised them if they were not able to complete the scoring and norming by the end of today to please complete and return by the end of June.

Report Out

DAT Leads discussed their reactions to scoring and norming their notices.

Closing Remarks/Survey/Adjournment

Several members discussed what this committee was doing and the need for performance goals. It was determined there was no measurement for success. An Ad Hoc Subcommittee led by JT Wright was created to work on creating goals for the committee.

Meeting was adjourned.



Wage & Investment Reduce Taxpayer Burden (Notices) Meeting Minutes

*April 7, 2005
Noon ET*

Participants (Panel Members):

- Anthony DiMartino
- Dick Greenberg
- Michael Guthman
- Sonny Kasturi
- Allena Lu
- Joyce Natter
- David Robinson
- Martin Romeril
- Ferd Scheider
- Sanford Searleman
- Virginia Symonds
- R. Jeana Warren
- Douglas Wilhelm
- Warren Wong
- James Wright

Not Present:

- John Hollingsworth
- Don Miller

Staff Members:

- Sallie Chavez (Recorder)
- Nancy Ferree (DFO)

Guests

- James (Jim) A. Cesarano, Program Analyst, Wage & Investment, Single Point of Contact (SPOC) Representative

Welcome

Committee Chair Mike Guthman welcomed everyone. He would like to add something to the agenda. He would like to talk about the feedback from the last meeting later in the meeting.

Roll Call

Program Analyst/Recorder Sallie Chavez took the roll call and quorum of eight (8) was met.

Review/Approval of Prior Meeting Minutes

The meeting minutes were approved by consensus.

Joint Committee Report

Committee Chair Mike Guthman said he sent out TAP Director Bernie Coston's notes from the Joint



Committee Conference Call. The Joint Committee reviewed proposal and dealt with the status of issues. They also discussed legislative issues.

TAP Program Manager Nancy Ferree reminded everyone that TAP was recruiting for new member until April 29. She asked them to actively recruit. TAP will be selecting about 40 new members.

She also informed the committee about the Tax Forums scheduled for this summer. They will be at six (6) locations – San Francisco, Houston, Atlanta, New York, Las Vegas and Chicago. Area Committees will be asking for volunteers.

TAP Program Manager Ferree also mentioned that TAP was working of direct deposits for travel reimbursements. Form will be sent out soon. This is not mandatory.

Face-to-Face Meeting

TAP Program Analyst Sallie Chavez reported all is well with the face-to-face meeting in Atlanta on May 20 and 21. The meeting on Friday (May 20th) will be at the Summit Federal Building which is two (2) blocks from the hotel. The meeting on Saturday (May 21st) will be at the hotel. Hopefully we will have a DRAFT Agenda for the meeting by the May 5th meeting. Committee Chair Mike Guthman asked for suggestions for the meeting. Email them to TAP Program Analyst and him as soon as possible.

Feedback

Committee Chair Mike Guthman stated that one of the areas of concern from the survey was that of participation. He agrees that there is not very much participation. He asked if anyone had any ideas. He said right now there is a limited amount of work but it will increase. DFO Nancy Ferree stated that this was a common affect with a large committee. One solution would be to ask individuals for input. One member suggested putting bullets under the item so the committee members could be prepared. Another suggestion was to have reports emailed to member ahead of time. If information could be provided to the Analyst in advance, she could distribute it before the meeting. One member asked for background information on all the members. DFO Nancy Ferree stated this information should be on TAPSpeak. Some were not. It was suggested to have introductions at the face-to-face meeting. This will be incorporated into the face-to-face meeting agenda.

Sub-Committee Reports

Committee Chair Mike Guthman stated there was very little activity last month. There was one Notice Elimination NPIIT teleconference but there was not enough notice given to have a representative on the call.

DAT Sub-Committee

TAP Program Analyst Sallie Chavez reported for Sub-Committee Chair Don Miller that teams were forms to score notices using the DAT. Only two (2) members have not been trained to use the DAT. They will be trained with the next couple of weeks. She asked that they contact her with their availability. She will be sending out notices to be scored. Try to have them done by the face-to-face meeting. Time will be set aside to work on them at that meeting.

Comments from SPOC Representative

SPOC Representative Jim Cesarano he has several issues to discuss. First, there is a Plain Language Conference in November in Washington. This worldwide organization can be found on the internet at www.plainlanguage.gov. This will be an international conference. The website for the international group is www.plainlanguagenetwork.org. SPOC Ann Gelineau is getting a panel together to participate in this conference. She would like a member of the committee to participate as well. There are some budget problems but he wanted to let the committee know about this.

SPOC Representative Jim Cesarano advised the committee that notices were printed at Service Centers. Now there are larger print sites in Ogden and Detroit. The director of these sites has invited



committee members to take a tour of either of the sites. W & I does not have the fund to pay for travel. If anyone is interested, contact him of the TAP Staff.

There is a DPT coming up in the spring or summer on the Penalty and Interest portion of the notices. Deborah Maxwell will be leading this team. Committee Member Dave Robinson was previously working with Liz Williams on the Good Government Act. She would still like help on this. She would like to have volunteers help to participate. She wants to know what the taxpayer would be interested in receiving. What is useful, helpful and necessary?

SPOC Representative Jim Cesarano said he reviewed the TAP Annual Report. He wants to make sure that everything was answered. He saw there was a recommendation make on the CP521. This notice is in the final stages of being revised. He would like to know if the information was incorporated into the notice.

SPOC Representative Jim Cesarano advised the committee that the Notice Elimination NPIIT was moving along. They have accepted the DPT model. This was created by a contractor for procedure and process. Any committee members on the DPT or NPIIT sub-committees should be aware of it. The team will adapt it for their work. The next meeting for the team is scheduled for next Tuesday, April 12. The meetings are scheduled for every other Tuesday from 2:00 p.m. to 3:30 p.m. It is optional for stakeholders to attend.

The private collections letters are being prepared. There is some difficulty in getting these ready. They are not ready for comments yet. SPOC Representative Jim Cesarano is actively participating in the preparation of these notices. He does not have a draft yet.

Open Action Item

This will be moved to the May face-to-face meeting in Atlanta.

Additional Comments

Committee Member Warren Wong said he would like to see before and after notices. Committee Member Tony DiMartino said the CP2000 would be a good example. TAP Program Analyst Sallie Chavez said she sent out the before and after for the CP2000 to all members. She will send it out to Committee Member Wong.

Meeting Close

Next meeting is scheduled for May 5, 2005 at noon ET.



Wage & Investment Reduce Taxpayer Burden (Notices) Meeting Minutes

*March 3, 2005
Noon ET*

Participants (Panel Members):

- Anthony DiMartino
- Michael Guthman
- Sonny Kasturi
- Allena Lu
- Don Miller
- Joyce Natter
- David Robinson
- Martin Romeril
- Ferd Scheider
- Sanford Searleman
- Virginia Symonds
- R. Jeana Warren
- Douglas Wilhelm
- Warren Wong
- James Wright

Not Present:

- Dick Greenberg
- John Hollingsworth

Staff Members:

- Sallie Chavez (Recorder)
- Nancy Ferree (DFO)

Guests

- James (Jim) A. Cesarano, Program Analyst, Wage & Investment, Single Point of Contact (SPOC)
- Ann Gelineau, Single Point of Contact (SPOC)

Welcome

Committee Chair Mike Guthman welcomed everyone.

Roll Call

Program Analyst/Recorder Sallie Chavez took the roll call and quorum of eight (8) was met.

Review/Approval of Prior Meeting Minutes

The meeting minutes were approved by consensus. One suggestion was made that if there is a change to the minutes, the change is noted in the minutes.

Joint Committee Report

Committee Chair Mike Guthman reported on the January Joint Committee Meeting Call. The Joint



Committee conference call will now be two (2) hours long. Business cards have been ordered. The new Communications Committee will be working on how to measure the success of TAP. If anyone has any suggestions, please forward them to your Area TAP Manger. Meeting Surveys will be distributed after each meeting. These surveys provide staff and chairs information about the process of the meeting. The TAP Program Analyst will compile the results of the surveys. The results will be forwarded to the chair and entered into TAPSpeak for everyone to review.

ACTION ITEM: TAP Program Analyst Sallie Chavez will forward surveys to all members after every conference call.

Committee Member Virginia Symonds also stated the Joint Committee address the issue of Legislative Issues. A form has been developed and will be used to raise these issues to the National Taxpayer Advocate through the Joint Committee.

Face-to-Face Meeting

TAP Program Analyst Sallie Chavez reported arrangements have been made to hold the face-to-face meeting at the Best Western Inn of the Peachtrees in downtown Atlanta. TAP Director Bernie Coston recommended it.

Information about travel will be sent out to committee member the end of March or the beginning of April. The dates of the face-to-face is May 19 – 21, 2005 with travel on the 19th and 21st.

Committee Reports

Limited Scope Redesign of Appeals Rights in Math Error Notices DPT

Committee Chair Mike Guthman worked with SPOC Representative Jim Cesarano (via conference call) when Jim was in Florida working on a DPT editing a paragraph on Appeals Rights. Committee Chair Guthman stated that some of the information he provided was used.

Notice Elimination NPIIT, ASFR Notices Review, Balance Due Notices, Delinquency Notices

Committee Member Doug Wilhelm said he would comment on all four (4) of his assignments together. He said he felt very welcomed by IRS staffers. At first, he was a little intimidated. The participants were very focused on their expertise while he was focused on the taxpayer. He stated his comments were well received. By the 4th call, he felt more comfortable.

IA Notice Review

Committee Member J T Wright said he had a similar experience. He was looking at it from the "eye of the taxpayer" who is the customer. The general idea was to simplify the process so taxpayers understand. SPOC Ann Gelineau stated there are many stakeholders with many views. They are going to try a new approach with review workshops. They will have all the stakeholders and provide their input. TAP is the voice of the taxpayers.

Discussion about Sub-Committees

Committee Chair Mike Guthman said that Committee Vice-Chair MaryAnn Motza worked on the Sub-Committees and sent out the list before she left to go onto the Communications Issue Committee. Committee Member Eileen Shuman assisted her with the list and now Eileen has resigned from TAP. He would like each Sub-Committee to select a chair. He would like the first person listed on the Sub-Committee to set up a conference call to select a chair for their Sub-Committee. Several members stated they had not received the list. TAP Program Analyst will send out the list as well as instructions on how to set up a conference call using the calling card.

ACTION ITEM: TAP Program Analyst Sallie Chavez will email the Sub-Committee list and instructions on how to make a conference call with the calling card.



Discussion about Vice-Chair

Committee Chair Mike Guthman said he had sent out an email requesting a volunteer to act as Vice-Chair and got no response. He would again like to ask for a volunteer. Committee Member Sonny Kasturi volunteered. It was agreed by consensus that he would be Vice-Chair.

Comments from SPOC Representative

SPOC Ann Gelineau asked to speak first. She said the job TAP has to do is very important. The job is not easy. She would like them to speak up. She wants them to get her involved if they are not welcomed at a meeting.

She then addressed the scoring of notices. The IRS printing system can't handle reverse font (which is white font in a black box). The IRS doesn't have this in their system. The IRS has to go through the process of procurement to obtain the funds (\$15,000) to purchase the equipment. During testing, this reverse font on notices was well received by taxpayers. At this time, it is not known if the printers can handle this reverse font. It may bog down the cycle time. It may only be used on some notices such as the CP2000. She would like the committee to score these "ideal notices".

SPOC Representative Jim Cesarano said Committee Member Dave Robinson was working on Penalty and Interest with Liz Williams. There is now going to be a DPT on Penalty and Interest. Debra Maxwell will be the lead. Congress has not passed the legislation yet so council has decided the IRS needs to include the penalty and interest statements on **ALL** notices. They will want a DAT score on this as well as how taxpayers feel about this attachment.

He conducted the first meeting on the Phase II of the Notice Elimination NPIIT. He is going back and rescoping it in the next couple of weeks.

While he was in Florida last month, he reviewed notices that need to be scored with TAP Program Analyst Sallie Chavez. While he was working on the DPT, one of the members learned about TAP and asked if the TAP would score some of his EIC notices. They will be put on the list to score.

He discussed the work done on his Appeals Rights paragraph. He said he received "loads" of suggestions.

He discussed stakeholders. There were more than 50 on his NPIIT project. He would like stakeholder to suggest solutions not point out problems.

There is a teleconference on February 15. He would like to invite someone from the committee to participate as a stakeholder. It is a requirements and expectations meeting that will last about 1 1/2 hours.

Open Action Item

This will be moved to next month.

Meeting Close

Committee Vice-Chair Sonny Kasturi said if reports were sent to members in advance of the meeting it would help everyone understand more about what they did.

Next meeting is scheduled for April 7, 2005 at noon ET.



Wage & Investment Reduce Taxpayer Burden (Notices) Meeting Minutes

*February 3, 2005
Noon ET*

Participants (Panel Members):

- Anthony DiMartino
- Richard Greenberg
- Michael Guthman
- John Hollingsworth
- Srinivasan Kasturi
- Allena Lu
- Robert Meyers
- Donald Miller
- Maryann Motza
- Joyce Natter
- Martin Romeril
- Ferd Scheider
- Sanford Searleman
- Eileen Shuman
- Virginia Symonds
- Elizabeth Warnecki
- R. Jeana Warren
- Douglas Wilhelm
- James Wright
- Gilbert Yanuck

Not Present:

- David Robinson

Staff Members:

- Sallie Chavez (Recorder)
- Nancy Ferree (DFO)

Guests

- James (Jim) A. Cesarano, Program Analyst, Wage & Investment, Single Point of Contact (SPOC)

Welcome

Committee Chair Mike Guthman welcomed everyone to the 2nd meeting of the issue committee. He thanked TAP Program Analyst Sallie Chavez for the DAT Training. It seems everyone but a couple of members have been trained and is ready to go with it.

Roll Call

Program Analyst/Recorder Sallie Chavez took the roll call and quorum of 11 was met.



Review/Approval of Prior Meeting Minutes

There was one change to the minutes. This change will be corrected. The minutes were approved by consensus with the one change.

Joint Committee Report

Committee Chair Mike Guthman reported on the January Joint Committee Meeting Call. As everyone should know by now, TAS realigned its areas and TAP has matched that realignment. Every area except Area 1 was affected. There is now a new Issue Committee that will work on internal communications such as the Annual Report, Annual Meeting and communications within TAP. Members will be moved from their current committees however, the staff will be looking to balance the committee.

The charter has been rewritten. It gave the committees limited ability. It has been submitted for approval.

DFO Nancy Ferree said an email was sent out about the new issue committee and it did not go out properly so some members did not get it. It has been reissued and the response time has been extended. Some of the Issue Committees were too large. The plan is to take 1 – 3 members from the existing committees to form the new committee. The decision on the new committee will be completed in the next week. She asked that everyone response, even with a negative, as soon as possible.

DAT Training

TAP Program Analyst Sallie Chavez reported that the two (2) training session went well. There were lots of questions and interest and everyone seems to be anxious to start working on the notice scoring. All but three (3) members have been trained to score the notices. She will set up a make-up session within the next month. It should only take about an hour.

Face-to-Face Meeting

Committee Chair Mike Guthman asked TAP Program Analyst Sallie Chavez to report on the face-to-face meeting. She stated that there is no time period where everyone is available. There are three (3) dates where there is only one (1) person who is not available for the meeting. They are April 28 – 30, May 19 – 21 and July 28 – 30. Committee Chair Guthman asked Committee Member Sandy Searleman if there was any possibility he could make the May 19 – 21 meeting. He is getting back from a long vacation on May 19 and thinks he would be able to turn around and make the trip. It was decided to hold the meeting May 19 – 21.

The next issue is where to hold the meeting. Committee Chair Mike Guthman stated that Atlanta and Dallas were the least expensive. TAP Program Analyst Sallie Chavez said the Issue Committee previously held a meeting in Atlanta and she has a contact with a hotel there. Returning members stated it was a good location. It was agreed to hold the meeting in Atlanta. TAP Program Analyst Chavez will start making arrangements.

Comments from SPOC Representative

SPOC Representative Jim Cesarano said he is going to be in the TAP Plantation office next week for a meeting to work on a limited rewrite of math error notices and appeals rights. If someone would like to participate in the meeting (by telephone), they would be welcomed. It is not going to be a formal meeting.

He is going to be working on implementing tests on outside collectors. He will be working on letters for this activity. He spoke to the lead about the TAP. They will share the draft with the committee. There are no timeframes or definite details about the team at this time.



There is going to be a Penalty and Interest Dynamic Project Team (DPT) created. They are planning to get into rewriting the Penalty and Interest attachment that goes with the notices. He will get additional information. This is congressionally mandated.

He is beginning the Phase II of the Notice Elimination NPIIT. There is a teleconference on February 15. He would like to invite someone from the committee to participate as a stakeholder. It is a requirements and expectations meeting that will last about 1 1/2 hours.

Discussion about Sub-committees

Committee Vice-Chair Maryann Motza stated she and Committee Member Eileen Shuman had a conference call and discussed the Sub-committees. She discussed the various committees.

Document Assessment Tool (DAT) will work with Jim Cesarano and will be responsible for the "norming" of the notices.

Quarterly Strategy Team will participate in any meetings set up by the Program Owner.

Referrals will work on referrals that are submitted to the committee from taxpayer or other areas. It was discussed that maybe this should not exist, as areas should submit recommendations to the Joint Committee. This committee will remain until this is confirmed.

NPIIT Report (Protocol Testing) will be expanded to include ALL NPIIT activities.

DPT will include **ALL** DPT activities.

These were the subcommittees from the last two (2) years. She would like to propose two (2) additional subcommittees.

New Issues would include emergent issues that come up such as the Good Government Act and Usability Testing. Because of budgetary issues, Usability Testing may be rotated or be within the area of the testing.

Communication would be a resource to the area committees and advise them of issues that come up within the area that are notice related.

Committee Vice-Chair Maryann Motza will send out an email with the subcommittee information requirements. Please email back to her your preferences of subcommittee.

Open Action Item

This will be moved to next month.

Other Questions

Committee Member Sonny Kasturi had some questions but agreed to hold them until next month since time was short.

Meeting Close

Next meeting is scheduled for March 3, 2005 at noon ET.



Wage & Investment Reduce Taxpayer Burden (Notices) Meeting Minutes

*January 6, 2005
Noon ET*

Participants (Panel Members):

- Anthony DiMartino
- Richard Greenberg
- Michael Guthman
- Srinivasan Kasturi
- Allena Lu
- Robert Meyers
- Donald Miller
- Maryann Motza
- Joyce Natter
- David Robinson
- Martin Romeril
- Ferd Scheider
- Sanford Searleman
- Eileen Shuman
- Virginia Symonds
- Elizabeth Warnecki
- R. Jeana Warren
- Douglas Wilhelm
- James Wright
- Gilbert Yanuck

Not Present:

- John Hollingsworth

Staff Members:

- Sallie Chavez (Recorder)
- Nancy Ferree (DFO)

Guests

- James (Jim) A. Cesarano, Program Analyst, Wage & Investment, Single Point of Contact (SPOC)

Welcome

Committee Chair Mike Guthman welcomed everyone and wished everyone a Happy New Year. He said he would provide time at the end of the meeting for anyone who had questions.

Roll Call

Program Analyst/Recorder Sallie Chavez took the roll call and quorum was met.

Review of Prior Meeting Notes

These notes do not have to be approved.



There was a question about the quorum. Quorum was discussed and it was decided (by consensus) that quorum would be 50%.

Email and Teleconference Etiquette

Committee Chair Mike Guthman reviewed the document "*Telephone Conference Call Etiquette*" and discussed email etiquette.

Joint Committee Report

Committee Chair Mike Guthman reported on the December Joint Committee Meeting Call, which was an administrative meeting. There was a discussion about the budget and committee chairs were informed that the committees would only be allowed to hold one face-to-face meeting. There was also a discussion about the SBSE issue committee. There was a proposal to split the SBSE issue committee into two (2) groups. At this point, it will stay as it is.

DAT Training

TAP Program Analyst Sallie Chavez stated that the original training was held at a face-to-face meeting and lasted 8 hours. It is estimated that it can be done (via conference call) in approximately 1_ hours. The original training contained additional requirements (such as preparing criteria to use to score the notices) that are not necessary for this training. TAP Program Analyst Chavez will prepare a schedule and send it out to all new members. She would like to have at least one established member on the call to answer any questions the new members may have. She is hoping to have this done by the end of January. If anyone is not available for a session, there will be a "make-up" session later.

Face-to-Face Meeting

Committee Chair Mike Guthman again stated the committee would only be allowed to hold one face-to-face meeting. He feels that since there are practitioners and members who deal with taxes, the face-to-face should be held after April. He suggests May, June or July. There was much discussion about dates. He asked TAP Program Analyst Sallie Chavez to send out a calendar for May, June and July with all the taken dates blacked out and ask who is available for the other dates.

Committee Member Eileen Shuman brought up the July meeting. She said July is a bad month for meeting since there are many members on vacation. It is difficult to get quorum. She would like to cancel it especially since it is during July 4th week. Committee Chair Mike Guthman said this would be discussed later.

Comments from SPOC Representative

SPOC Representative Jim Cesarano reviewed what has been happening. He said he was sorry he could not attend the November Annual Meeting.

Committee Chair Mike Guthman said he had a discussion with SBSE Chair Paul Nagel and it was decided that all notices (whether SBSE or W&I) would be worked by the Notice Committee. The two groups will partner with each other.

SPOC Representative Jim Cesarano discussed the business and individual notices. He talked about the relationship with the SBSE SPOC.

SPOC Representative Jim Cesarano said he was the lead on the Notice Elimination Notice Program Improvement Initiative Team (NPIIT) that was supposed to begin during last summer. He is hoping to have a Stakeholder meeting the end of February via conference call. He would like to have a representative from the committee on this conference call.

SPOC Representative Jim Cesarano also stated he is going to lead a small group to revise paragraph on Appeals Rights in math notices. There is some disagreement on the Plain Language, which is used



to rewrite notices. He will forward this information to TAP Program Analyst Sallie Chavez. There is no deadline for this project. They only want comments. It is a long-range issue.

Discussion about Sub-committees

Committee Member Eileen Shuman discussed the orientation package she mailed out to all new members. Committee Vice-Chair Mary Ann Motza will coordinate. Committee Member Shuman and Vice-Chair Motza will discuss this off-line.

Open Action Item

This will be moved to next month.

Other Questions

Committee Member Sonny Kasturi wanted to know if the NPIIT sub-committee deals with publications. DFO Nancy Ferree stated that publication were not part of this committee. Committee Member Eileen Shuman said that a NPIIT is provided by IRS. SPOC Representative Jim Cesarano said the SPOC does not have control of forms and publications.

Committee Member Sonny Kasturi also wanted a list of notices and their volumes. Committee Member Eileen Shuman stated that this was not available to committee members.

Meeting Close

Next meeting is scheduled for February 3, 2005 at noon ET.