



2007 Meeting Minutes Simplification of Notices Issue Committee

- November 1, 2007
- October 4, 2007
- September 6, 2007
- June 7, 2007
- May 3, 2007
- April 5, 2007
- March 14 - 16, 2007
- March 1, 2007
- February 1, 2007
- January 4, 2007

**Taxpayer Advocacy Panel (TAP)
Issue Committee
Wage & Investment (W&I) Reduce Taxpayer Burden
(Notices)**

**Meeting Minutes (Teleconference)
November 1, 2007 1:00pm eastern time**

Designated Federal Official (DFO)
Nancy Ferree, TAP Program Manager, Plantation, FL

Members Present

Steve Fulkrod
Joe Hurr
David Jones
David Meister
Neil Mitchell
Max Scott
Howard Stahl
Lee Stieger
Mary Suther
Chuck Tice
Edward Uhrig
Warren Wong
J. T. Wright

Members Absent

Ben Chapman
Paul Colombo

Staff Present

Sallie Chavez, TAP Program Analyst, Plantation, FL
Anita Fields, TAP Staff & Note taker
Jim Cesarano, Program Owner



Welcome & Announcements

Lee Stieger welcomed everyone and asked Anita to take roll.

Roll Call

Quorum was met.

Approve Meeting Minutes

Minutes from October were approved as written.

Comments from Program Owner

Jim Cesarano informed the committee of the actions taken on the visually impaired memo that was received in August. He stated that most of the recommendations are outside the scope of their office therefore they identified what executives would be in charge of taking action within the fields of those recommendations. They are preparing a memo and it is going to go out to the executives. Jim also stated that his office will then prepare a memo back to the committee informing them of what action was taken.

The testing memo was sent to Barbara Powell. She is the person in their office that handles testing. Barbara is going to be responding to that memo. Jim has no idea what her response will be and he is hoping that she has something ready for next month.

The Form 886 project improvement team would like to meet with the subcommittee that scored the form and discuss the score around the week of the 19th of November. Jim stated that there might be a problem with coordinating because the Form 886H EIC form was tested at the tax forums and the improvement team wants to meet with the scoring team and the people who facilitated the test at the tax forums on one call. They were happy with the scores of the EIC, but they want to discuss the Form 886H HOH and how to improve the score.

Dave Meister asked if they could do this at a breakout session in Washington for the Annual Meeting. Jim stated that the exam people don't really have the funds for the travel. He also stated that the deadline to get the 2008 form in is the end of December. Jim stated because of the amount of people involved then they might have to schedule three different calls. Jim is going to try and schedule these call when the committee usually have their subcommittee calls which is the last Wednesday of the month.

Warren Wong wanted to know what the ground rules for what is discussed on the call. Jim answered that they will talk about scores. The structure will be the DAT form.

Subcommittee Report and Updates

Document Assessment Tool (DAT)

DAT Team 1 (CP225 & 207) –

Joe Hurr has completed project and forwarded onto Sallie Chavez.

DAT Team 3 (Form 886H-HOH & CP159& 162)

Dave Meister stated the team has completed the scoring on the Form 886H HOH for 2007 and it has been forwarded on. We want to get the CP 162 before the week of the 12th. Dave stated that by the week of the 16th all of his subcommittee's DAT scoring will be complete.

Nancy Ferree asked if once a form is completed and sent forward, do we receive a response? Jim Cesarano stated no they don't send anything back.

DAT Team 4 (CP 261&187)

Both forms are complete and have been sent to Sallie Chavez.



Stuffer Project

Dave Mesiter stated they are moving forward and will have their next committee call next week Wednesday. Once that call is complete we they have some information to forward on.

Targeted and Improved Communications

Chuck Tice reported the project is complete and it is all on TAPSpace and ready to be forwarded to whatever office it goes to. Nancy Ferree asked where it goes from here. Jim Cessarano stated that he has no idea where it goes. J.T. stated that it would be helpful if someone from the IRS give us some type of review information for this presentation. Jim stated that what he got from Sidney is that the Targeted Communications was not going to be followed up on that they were going to go with usability testing. The committee can get a formal response from a memo and fold this issue into the testing. Chuck stated that this power point was developed to help the IRS get a response from the mail. It is an outstanding presentation if they would just take a look at it. Jim suggested that if the committee has a product, put it forward when there is an opportunity. There is going to be a memo coming to you in forms of testing. Just be persistent about what you want to get looked at.

Vision Impaired (TIGTA) Project

Mary Suther stated that it was completed and they are just waiting to receive a response back from Jim Cesarano.

Combined Forms & Testing Project

There is nothing new to report. Sallie Chavez wanted to know if this should be closed and Jim Cessarano stated that Barbara Powell was drafting a memo, therefore we should keep this open until we receive the memo.

Max Scott states that he don't think we should close these issues out. He asked Mary Suther is there anything she feels she should pass on in reference to the Visually Impaired project, as she leaves or does she feel there is nothing more to be done? Mary Suther responded by saying that her committee agreed with the TIGTA report and the recommendations they had. We had a few more recommendations and if it is as important as she was led to believe then she feels that someone should keep up with it. Max suggested that dealing with the subcommittees should be an order of business early in the New Year. He also feels the new Chairman and committee members should make the decision on whether to close out these committees or not.

DAT for Forms (FAT) - (Forms Assessment Tool)

Max Scott stated that he has not done anything this month because he keeps thrashing with it. He stated that he needs to set up a sub committee call. He also stated that he took Jim's suggestions and cut it back and some of the subcommittee members thought maybe he cut it back too much. He is going to set up a call the last Wednesday of the month to go over it.

Jim asked if Max needs to talk to someone from the IRS in Forms and Pubs about IRS Forms? Max stated that he doesn't think so at this point but he will address it if necessary. Jim asked Max when he thinks they will have the recommendation ready to go forward to notice improvement. Max stated the first quarter of the New Year.

Max took this time to thank Mary Suther and Warren Wong for their time they served on the Notice Committee.

CP63 Feedback

Sallie Chavez reported the committee was asked to do a quick turn around and provide feedback on the CP63 notice. It was completed and is now posted on TAPSpace. Nancy Ferree wanted to thank everyone for their participation in doing this quick turn around.



Max Scott said that he welcomes the short notices and we understand, but please let's help out because this is a place where TAP can shine.

Jim Cesarano stated that he thinks this is a really good sign of starting a new relationship.

We have a draft agenda based on last year and changes that needed to be made. It has been posted on TAPSpace. It is still not final and he relish any comments for what may need to be added.

Meeting Close

Lee Stieger thanked Mary Suther, Warren Wong and J.T. Wright for the participation on the Notices Committee. He also stated that he is looking forward to ending the year and starting up a new one.

The Notices Issue committee meeting was adjourned.

Next meeting will be in December at the Annual Business Meeting.

Certification: These minutes were approved by the Notice Improvement Issue Committee by consensus on December 13, 2007.



**Taxpayer Advocacy Panel (TAP)
Issue Committee
Wage & Investment (W&I) Reduce Taxpayer Burden
(Notices)**

**Meeting Minutes (Teleconference)
October 4, 2007 1:00pm eastern time**

Designated Federal Official (DFO)

Sallie Chavez, Acting TAP Program Manager, Plantation, FL

Members Present

Ben Chapman
Paul Colombo
Steve Fulkrod
Joe Hurr
David Meister
Max Scott
Lee Stieger
Chuck Tice
Edward Uhrig
Warren Wong
J. T. Wright

Members Absent

David Jones
Neil Mitchell
Howard Stahl
Mary Suther

Staff Present

Anita Fields, TAP Staff & Note taker
Jim Cesarano, Program Owner

Welcome & Announcements

Max Scott Chair opened the meeting by welcoming Jim Cesarano back and all other panel members and asked TAP staff Anita Fields to call roll. It was noted that there were no citizens present.

Roll Call

Quorum was met.

Approve Meeting Minutes

Minutes from July and September were approved as written.

Comments from Program Owner

Jim Cesarano is still researching information on the memos from the Vision Impaired Project and the Combined Forms and Testing Project. Have a new project which is on a very short deadline. The project is due next week. It is a survey project from W&I analyst, her name is Althea Fulton. What she wants is for people to take this short test as a dry run, it is not really a survey. This is to test this test before it goes out to the public to try to catch any hiccups with it and get it changed before she puts it out, so please provide comments after you take the test. She needs Tax Practitioners that work specifically on individual tax returns. The information should be funneled through Sallie Chavez to Jim and then Jim will get it to Althea Fulton. Chair Max Scott urged all Tax Practitioners to participate in this test.



Ben Chapman now on call and is now running the meeting as Acting Chair.

Jim informed the committee that there is a DPT process guide being finalized. It will identify TAP's role. They will ensure that TAP is put down as a stakeholder.

Paul Colombo wanted to know if panel members across TAP can participate in the testing. Jim answered yes it would be good for it to go across TAP. Paul then asked if Jim wanted to go outside of TAP to the practitioners. Jim answered no, because eventually it is going to go to all Tax Practitioners. This is something to gauge accuracy and to find out if there is anything missing.

Ben Chapman mentioned to the committee that their will be a self nomination for TAP Chair and Vice Chair. If you are interested please send an email to TAP Vice Chair Bob Meyers and also copy your Area Chair with a little background information. Anyone who decides they would like to run will be on the ballot. There will also be a nominating committee for the first time in TAP history. The committee will be composed of the TAP Vice Chair and one 3rd year member from each of the seven areas. The vote will be done by email before the annual business meeting.

Subcommittee Report and Updates

Document Assessment Tool (DAT)

DAT Team 1 (CP225 & 207) –

Joe Hurr has completed project and forwarded onto Sallie Chavez

DAT Team 3 (Form 886H-HOH & CP159& 162)

CP 159 has been completed and has a conference call scheduled for the 17th of October to work on Form 886H- HOH and the CP 162 is scheduled for November. The team plan to have them all completed before the annual meeting.

DAT Team 4 (CP 261&187)

Both forms are complete and have been sent to Sallie Chavez.

Stuffer Project

We are making progress after the call on September 25 we asked Sallie questions and she has already answered. We have another call scheduled for October 15. We are proceeding okay and we are completing one call a month. Comments were made that last month's meeting was very productive. Jim mentioned that the FY08 budget includes \$187 million for postage and \$63 million for printing an estimated 183 million pieces of correspondence. These large amounts are expected be a focus area in FY08.

Targeted and Improved Communications

Project has been sent to Sallie around the 15th of September. Chuck will send the information to Sallie Chavez again. Jim will then follow up with Sidney Gardner. There could be a funding issue with the committee's recommendations.

Vision Impaired (TIGTA) Project

Committee is still waiting on answer from Jim Cesarano before we move forward on the project to ensure that we are going into the right direction.

Combined Forms & Testing Project

Committee is still waiting on answer from Jim Cesarano before we move forward on the project to ensure that we are going into the right direction.

Form 886H-EIC 2007- Has been scored and sent to Sallie with comments. The form has been improved since we scored the 2006 form.



Ben Chapman spoke on an email that was sent out for comment with a short turn around pertaining to identity theft. It was a scoring of a letter versus a notice, but hopefully the comments received helped.

DAT for Forms (FAT) - (Forms Assessment Tool)

Max Scott took Jim's letter on his comments when it was informally sent it to him and incorporated most of the changes and sent it out to the committee and received some changes back. Max will set up a conference call so that they can come to a complete understanding to see how the team will proceed. Max will set will then send another informal submission to Jim or set up a call with him. Jim offered to include a representative from Forms & Publications on the call.

CENTS Training- Jim mentioned this internal project for training IRS employees in creating effective notices for taxpayers. It might be possible for TAP to review the materials and perhaps participate in the training.

Meeting Close

Max Scott would like to thank all of the subcommittee's for their hard work this month. J.T. wanted to take the time to compliment Ben Chapman for summarizing the comments from the Joint Committee call.

Paul Colombo posed a question from Area 1 regarding notices sent in connection with installment agreements. Other issues from the New York Tax Forum' focus group also involved notices. Area 1 would like to know if they should send these to the Notice Issue Committee or keep them in Area 1. Ben Chapman stated that he participated in the focus group and that Area1 should send it to the Notice Committee and they will take a look at it and see if it is something to score or could be worked jointly with Area 1. Sallie Chavez asked Paul to ensure that the Notice number is included.

Lee Stieger will be the Acting Chair for next month's meeting.

The Notices Issue committee meeting was adjourned.

Next meeting will be November 1st 1:00pm ET Teleconference.

***Certification of Meeting Minutes: These minutes were approved by the TAP**

Notice Issue Committee by consensus on 11/1/2007.



**Taxpayer Advocacy Panel (TAP)
Issue Committee
Wage & Investment (W&I) Reduce Taxpayer Burden
(Notices)**

**Meeting Minutes (Teleconference)
September 6, 2007 1:00pm eastern time**

Designated Federal Official (DFO)

Nancy Ferree, TAP Program Manager, Plantation, FL

Members Present

Ben Chapman
Joe Hurr
David Jones
David Meister
Neil Mitchell
Max Scott
Howard Stahl
Lee Stieger
Chuck Tice
Edward Uhrig
Warren Wong

Members Absent

Paul Colombo
Steve Fulkrod
Mary Suther
J. T. Wright

Staff Present

Sallie Chavez, TAP Analyst
Anita Fields, TAP Staff & Note taker
Sidney Gardner, Program Owner

Welcome & Announcements

Chuck Tice Acting Chair opened the meeting by welcoming panel members and asked TAP staff Anita Fields to call roll. It was noted that there were no citizens present.

Roll Call

Quorum was met.

Approve Meeting Minutes

Minutes from August were approved as written.

Set Time for Sub-committee Conference Calls

Tap Analyst Sallie Chavez informed the committee that the forth Wednesday of each month there will be sub-committee calls. DAT Teams will meet at 11am EST and the other sub-committee calls will be at 2pm EST. All members that were present agreed to the days and times with the understanding that if they can't make it the call can be rescheduled. Chuck Tice stated that the times were not good for him, but he will try to make the call if he is not busy.



Comments from Program Owner

Sidney Gardner is sitting in for Jim Cesarano who is currently on a detail. He stated that they did get the recommendation for the Vision Impaired Project and the Combined Forms & Testing Project; he will review those and get a response back to the committee in approx. 45 days. He also stated that he appreciates the support of the committee.

Subcommittee Report and Updates

Document Assessment Tool (DAT)

DAT Team 1 (CP225 & 207) - Joe Hurr stated that the team did not meet; therefore they have nothing to report.

DAT Team 2 (CP161 & 215)-

Dave Jones stated that they completed both documents and forwarded to Sallie Chavez on 8/5/2007. Dave Meister questioned when do you use a D, F, or Not Applicable? Max Scott stated that if you feel there should be a heading and there is not a heading then score it an F. He also stated that if you have questions send them to Sallie. Ben Chapman thinks that giving an F or a N/A should be an agenda item at the upcoming Annual Meeting in December. Max also informed everyone that during the spring face-to-face meeting Sallie gives DAT scoring training. Everyone that has questions please write them down and send to Sallie and maybe she can expand the training.

DAT Team 3 (Form 886H-HOH & CP159& 162)

Dave Meister stated that his team has scored 886H-HOH and Warren Wong will put the scores together and send to Sallie. CP 159 & 162 the team will have it scored and sent to Sallie by 09/25/2007.

DAT Team 4

Lee Stieger stated that there are only three people on his team and only two were on the call, therefore they need to schedule another call because with the two there was a discrepancy in the scores.

Stuffer Project

Dave Meister created a list for Sallie on July 23rd and got a response on the 31st. Had another conference call on the 28th of August and still waiting on response. I believe we are still on track. Ben informed Dave Meister that Sallie answered that response on 4 September. He will set up a conference call to be held in the next couple of weeks.

Targeted and Improved Communications

Chuck Tice is the lead. Stated that they have nothing to report.

Dynamic Project Team--Letters

Lee Stieger's team got together and completed scoring all letters. Letters were sent to Sallie and Sallie sent them to Jim Cesarano. Sallie will leave open until she hears from Jim. Jim will follow-up to find out where letters are.

Vision Impaired (TIGTA) Project

Mary Suther is lead and she is not present. Lee Stieger stated that they have reviewed some information and sent a document to Jim Cesarano for guidance on which direction to take the project. Sidney Gardner could not provide any information, but will get in contact with Sallie and see if he can get something back to the committee. Sidney Gardner remembered that he did receive the email and will be getting a response back in a couple of weeks.



Combined Forms & Testing Project

Dave Jones is lead. A memo was sent to Jim Cesarano with a list of approx. 10 items for guidance on which way the committee should go with the process. Just waiting on response from Program Owner.

FAT (Forms Assessment Tool)

Max Scott stated that last month he sent out Jim's straw man format. He has tried to make suggested changes but does not have the unprotected document. Will have Sallie send him the unprotected document and make the changes and re-distribute.

Meeting Close

Chair Chuck Tice asked for any comments before close.

Max thanked Chuck for chairing the meeting and informed the committee that Lee Stieger will chair the committee next month. He also wanted to ask everyone to think about becoming a Chair next year. Dave Jones informed committee that he will not be present for next month's meeting. Ben Chapman made comment if whether we can have new members on the November conference calls.

The Notices Issue committee meeting was adjourned.

Next meeting will be October 4th 1:00pm ET Teleconference.

***Certification of Meeting Minutes: These minutes were approved by the TAP**

Notice Issue Committee by consensus on 10/4/2007.



**Taxpayer Advocacy Panel (TAP)
Issue Committee
Wage & Investment (W&I) Reduce Taxpayer Burden
(Notices)**

**Meeting Minutes (Teleconference)
May 3, 2007 1:00pm eastern time**

Designated Federal Official (DFO)

Nancy Ferree, TAP Program Manager, Plantation, FL

Members Present

Ben Chapman
Paul Colombo
Steve Fulkrod
David Jones
David Meister
Neil Mitchell
Max Scott
Howard Stahl
Chuck Tice
Edward Uhrig
J. T. Wright

Members Absent

Joe Hurr
Lee Stieger
Mary Suther
Warren Wong

Staff Present

Sallie Chavez - TAP Analyst
Anita Fields - TAP Staff & Note taker
Jim Cesarano - Program Owner

Welcome & Announcements

Committee Chair Max Scott opened the meeting by welcoming panel members and asked TAP staff Anita Fields to call roll. It was noted that there were no citizens present.

Roll Call

Quorum was met.

Approve Meeting Minutes

Minutes from April were approved as written.

Comments from Program Owner

Nothing new happening. Geoff Gerbore is leaving for a new position. In terms of dealing with 886's and certain notices you will be dealing with a new person.
Jim Cesarano will get back with the committee with the name.

Sidney Gardner will be going on a detail for about six months. Not sure when it is going to start.



Jim had question on CDP Form 12153 and will wait until we discuss later in the meeting. He just stated that he would like to get the re-write.

CDP Form 12153

Chuck Tice—completed form a couple of weeks ago. Sallie Chavez has posted on TAPSpace. Have not DAT scored it yet. Chuck is waiting for the scores from his subcommittee members. Chuck will set up a telephone conference once he gets all the scores.

Subcommittee Report and Updates

Joe Hurr was not present.

Stuffer Project

Dave Meister and his subcommittee had conference call last month. Has made progress, but has nothing to report.

Direct Mail Marketing

Chuck will research and get back with the committee and let them know what the new name will be. Nothing else to report.

Document Assessment Tool (DAT) Scoring

Dave Jones will be scoring the 886 EIC and sending it out to the rest of the subcommittee this week. Ben Chapman has already scored and sent to Dave Jones. Once he gets all the scores, he will set up a conference call with the other two members of the subcommittee. Should be able to wrap it up next week.

Dave Meister has form 886 HOH and he stated that he will get his form scored this week and email to Howard then hold a conference call and get information back to Sallie Chavez by May 18.

Dynamic Project Team

Ed Uhrig was appointed as lead. He has nothing to report. He just got back from vacation. He did receive the CP 23, 24, and 25.

Sallie Chavez said she is trying to get the revised CP 23, 24 and 25 but has not had any success. She requested help from Program Owner Representative in getting copies of these revised notices.

Vision Impaired (TIGTA) Project

There is nothing to report. They have received the TIGTA report and will be going through that.

Combined Forms & Testing Project

Dave Jones is lead. Dave Jones has completed and need to get something in writing and get it out to the committee for feedback.

FAT (Forms Assessment Tool)

Max will send a revised form that he asked Sallie Chavez to post on TAPSpace. He also sent the form out to the subcommittee. Once form is placed on TAPSpace and the entire committee review and gives feedback, then he will revise and send to the Program Owner for their input.

NPIIT

Inactive Committee

Meeting Close

Chair Max Scott asked for any comments before close.



Ben Chapman informed committee that the acting Commissioner will be Kevin Brown.

The Notices Issue committee meeting was adjourned.

Next meeting will be June 7th 1:00pm ET Teleconference.

Action Items:

Jim Cesarano is going to research and get Sallie Chavez an answer regarding the CP 23, 24 and 25.

Dave Meister will hold conference call and get scores to Sallie Chavez by May 18th.

Chuck Tice will have a new name for Direct Mail Marketing by the next call.

Dave Jones will get scores from the other subcommittee members and have scores to Sallie Chavez by next week.



**Taxpayer Advocacy Panel (TAP)
Issue Committee
Wage & Investment (W&I) Reduce Taxpayer Burden
(Notices)**

**Meeting Minutes (Teleconference)
April 5, 2007 1:00pm eastern time**

Designated Federal Official (DFO)

Nancy Ferree, TAP Program Manager, Plantation, FL

Members Present

Ben Chapman
David Meister
Neil Mitchell
Max Scott
Lee Stieger
Chuck Tice
Edward Uhrig
Warren Wong
J. T. Wright

Members Absent

Paul Colombo
Steve Fulkrod
Joe Hurr
David Jones
Howard Stahl
Mary Suther

Staff Present

Anita Fields, TAP Staff & Note taker
Nancy Ferree, TAP Manager

Welcome & Announcements

Committee Chair Max Scott opened the meeting by welcoming panel members and asked TAP staff Anita Fields to call roll. It was noted that there were no citizens present.

Roll Call

Quorum was met.

Approve Meeting Minutes

Minutes from March Face-to-Face were approved with changes.

Comments from Program Owner

Program Owner was not present. He did have a task for the committee. The SME of the CP 136 would like to have the notice rescored by the committee based on the new version and the stuffer that is going out with the notice.

CP 136 was assigned to Lee Stieger, Chuck Tice and Max Scott.
Teams are unclear, so Nancy is going to forward to Lee Stieger and they will clear up who is on the team to score the notice.



Ben Chapman wants to score new forms from the payroll dept. John Tuzinski of SBSE gave a talk about a week ago and indicated that there were two forms CP 207 and CP 207L and they are looking to revise the forms.

Nancy will have Sallie speak with Jim about this.

Chuck Tice needs a phone card. He will call Nancy or Sallie next week to set up conference call.

Form 886H HOH-Dave Meister is lead. Will score form next week
Form 886H EIC- (2 versions) Ben scored and emailed to Max Scott. Max advised when scoring is complete, the team members need to meet to "norm" the score. If new members are uncertain about this process, please check with the chair or Sallie Chavez for instructions.

Subcommittee Report and Updates

Joe Hurr was not present.

Stuffer Project

Dave will take over the lead. Dave wants Ben Chapman to be Co-lead in his absence if there is a face-to-face. Max will forward an email he got from Lee Congdon to Dave for him to share with his committee. There will be a call next Friday the 13th.

Direct Mail Marketing

Chuck is now the lead. We need to change the name of the subcommittee from Direct Mail Marketing to Strategic Communication. We will still use Direct Marketing techniques Committee (Joe Hurr, Mary Suther, Howard Stahl)

Document Assessment Tool (DAT) Scoring

Max cleared up any questions regarding to DAT. Under the DAT subcommittee there are four scoring teams. Each of those teams should have a conference call to come to a consensus ("norming" of the score) and then send that score to Sallie. He also made clear that the committee does not have a FAT scoring tool yet.. The subcommittee is there to establish a FAT scoring tool. We use DAT to score everything.

Joe Hurr is Vice Chair, therefore he is the leader of DAT teams.

Dynamic Project Team

Ed Uhrig was appointed as lead. He has nothing to report. Need to speak with Sallie, but will be out of the net for about three weeks. Have not had any luck with hearing from Joe Hurr. He has tried to contact him on several occasions.

Vision Impaired (TIGTA) Project

There was nothing to report. Ben Chapman wanted to make note that the report that we got at the face-to-face is now finalized.

Combined Forms & Testing Project

Dave Jones is lead. There is nothing to report.

FAT (Forms Assessment Tool)

Max is lead. Max sent out a draft version of the DAT form. Max only received one response back. Everyone made notice that they did not receive the form.



Collections Due Process Form (12153)

Steve did a re-write and he did an outstanding job on that. They will have a teleconference next week and send the results to Sallie.

NPIIT

Inactive Committee

Meeting Close

Chair Max Scott asked for any comments before close.

TAP Chair J.T. Wright made a comment on how well the committee meetings are being conducted. He stated that it has come a long way from the previous years.

Warren wanted to know if we could put together a to-do list for the members.

The Notices Issue committee meeting was adjourned.

Next meeting will be May 3rd 1:00pm ET Teleconference.

Action Items:

- **Sallie Chavez needs to identify members of scoring teams**
- **Chuck Tice will call Nancy or Sallie to set up conference call.**
- **Nancy Ferree and Sallie need to speak with Jim Cesserano to inquire about forms CP 207 AND 207L. Ben wants to be included in conversation.**
- **Nancy will forward Lee Stieger email from Jim.**
- **Sallie will get with Lee Stieger to see who is assigned to the team to score the notice (CP 136).**
- **All Leads need to complete a status form on a quarterly basis. One is due now.**
- **Dave Meister need to set up call with other members of his committee to write up what direction the Stuffer is going.**
- **Nancy needs to contact Joe Hurr to ensure that everything is okay since people have tried to contact him with no response.**
- **Max Scott needs to send draft version of DAT form to his committee members.**
- **Chuck will get Sallie up to speed on F12153. He is hoping to meet April 15th deadline. Sallie needs to send out to entire committee. Once she gets it and cleans it up.**

End of meeting.



**Notices Issue Committee
March 14 - 16, 2007
Atlanta, Georgia**

March 14, 2007
March 15, 2007
March 16, 2007

Members in Attendance:

Max Scott, Baton Rouge, LA (present 3/14, 15 & 16)
Warren Wong, Rochester, MN (present 3/14, 15 & 16)
Chuck Tice, Blytheville, AR (present 3/14, 15 & 16)
Benson Chapman, Wayne, NJ (present 3/14, 15 & 16)
Howard Stahl, Los Angeles, CA (present 3/14, 15 & 16)
Ed Uhrig, Lusk, WY (present 3/14, 15 & 16)
Mary Suther, Dallas, TX (present 3/14, 15 & 16)
Lee Congdon, Washington, DC (present 3/14, 15 & 16)
Lee Stieger, Leavenworth, KS (present 3/14, 15 & 16)
Steve Fulkrod, Bel Air, MD (present 3/14, 15 & 16)
Patrick Mitchell, Provo, UT (present 3/14, 15 & 16)
J.T. Wright, Carrollton, GA (present 3/15 & 16)
Joe Hurr, Dayton, OH (present 3/15 & 16)

Staff:

Nancy Ferree, TAP Program Manager (DFO) (present 3/14, 15 & 16)
Sallie Chavez, TAP Program Analyst (present 3/14, 15 & 16)
Bernie Coston, TAP Director (present 3/14 & 15)
Jim Cesarano, IRS Program Owner Representative (present 3/14, 15 & 16)
Anita Fields, TAP Secretary (present 3/14, 15 & 16)

Guests:

Susan Gilbert, Senior Program Analyst, Atlanta, GA (present 3/14)
Robin Tuczak, Teleconference (3/15)
Bridget Mallon, Teleconference (3/15)
Laurence Williams, Teleconference (3/15)
Jerry Douglas, (present 3/15)
Frank Jones, (present 3/15)
Ann Gelineau, (present 3/15)
Sharon Tafoya, (present 3/15)
Geoff Gerbore, (present 3/15)
Lisa Phillips, (present 3/15)

MARCH 14, 2007



WELCOME

Committee Chair Max Scott welcomed everyone.

INTRODUCTIONS OF PANEL

All Committee Members introduced themselves to the group.

APPROVAL OF MEETING MINUTES

- December 12, 2006 meeting minutes were approved with changes.
- January 16, 2007 meeting minutes were approved with changes.
- February 1, 2007 meeting minutes were approved with changes.
- March 1, 2007 meeting minutes were approved with changes.

Warren Wong suggested that we strive to approve minutes at next meeting.

NATIONAL OFFICE REPORT

TAP Director Bernie Coston gave the following report:

Gave update on recent TAP activities and the Town Halls in Brooklyn, Omaha, and Tempe. TAP will take part in Tax Forums. Bernie also suggested to have Face-to-Face for next year in Detroit and or Ogden so new members can tour print site. He also emphasized to the members that recruitment starts Mon 3/19 until 04/30/2007.

PROGRAM OWNER REPORT

Jim Cesarano gave his presentation. He explained about the terms, notices, forms, and correspondence. All those terms really refer to Public Use Documents.

Subcommittee Report

Max discussed progress report for subcommittees. Each subcommittee should agree to have a report to the Chair by the end of the month so he can keep up to date on subcommittee progress.

Max asked Sallie to post quarterly reports on Tap Space.

DAT- Since lead was not present; Sallie advised what the team will do on Friday during DAT training. Jim Cesarano advised about the next group of notices to be scored. Max explained what the DAT scoring is about. Jim explained how each IRS operating function expects different input on forms. They are asking TAP to look at forms just as citizens would.

Forms Assessment Tool (FAT), Warren thinks a separate assessment tool is need to assess forms. Any panel member can be on the subcommittee.

Max appointed a FAT subcommittee and assigned Ben Chapman, Lee Stieger, Howard Stahl and himself as the lead.

DPT- Ed states no report, but will have work tomorrow.



Stuffer Project- Lee Congdon gave report, new lead will be appointed. He suggested a pilot program be established to develop a user profile to meet needs of Taxpayers. Max requested a write-up from Lee to pass this project forward.

Direct Mail Marketing- Presentation to be delivered tomorrow. It is a long term project and language is a real issue. Treating taxpayers differently due to language or disability is another real issue.

Vision Impaired- Mary Suther gave update on her activities to address the blind and disabled persons.

Combined Testing & Forms- Ben and Neil were the only members present from last committee, therefore no report at this time.

STANDARDIZATION GUIDE

Sallie gave presentation on Language Standards- common style issues; she also solicited input on the language standard, common style guide.

CLOSING REMARKS

Committee Chair Max Scott asked the group for any comments

Lee Congdon announced he is taking a new job in a new city and must resign from TAP at the end of March.

MARCH 15, 2007

WELCOME/ANNOUNCEMENTS

Committee Chair Max Scott opened meeting.

DIRECT MARKETING- Lee Congdon gave presentation on Direct Marketing. Panel members wanted to know if presentation can be place on TAP Speak. Jim Cesarano gave background as to how this issue/activity came about by IRS.

TAS BRIEFING- Bridget Mallon, Robin Tuczak and Laurence Williams conducted a briefing on Form 12153, Request for a Collection Due Process or equivalent Hearing. to Panel members. Teleconference initiated and panel members and others participated.

Subcommittee was formed to address Form 12153, Chuck Tice lead, Neil Mitchell, Steve Fulkrod, and Warren Wong appointed. Sallie Chavez is to assist. First cut April 15th.

TIGTA- Jerry Douglas and Frank Jones (Audit managers) gave a brief overview on the different types of audits that are conducted and how it benefits the taxpayers. Primarily audits of customer service areas of IRS (i.e.: phones, ETA, walk-in offices and notices). Panel members gave several recommendations on how IRS can provide better service to all section 508 taxpayers. Jim asked TIGTA to define the task they want done. J.T. suggests TIGTA provide information on executive summary to TAP web site. TIGTA agreed to provide all reports. TAP will give schedule of periodic meetings to TIGTA.

Addressed by Program Owner - Ann Gelineau and Shawn Tafoya briefly touched on the visibility (user) testing. It was also noted that 50% of the indigent don't have net access at home. Ann also commented on what TAP does and how they add value to the Notices function.



Exam Issues - Lisa Phillips and Geoff Gerbore from exam touched on the process of EITC exams. They primarily talked about Earned Income Tax Credit (EITC). It was stated that EITC refunds are held pending EITC audits. Geoff announced that it was 2 notices that his office wants input on. They are CP75 and 886.

Meeting adjourned.

MARCH 16, 2007

WELCOME/ANNOUNCEMENTS

Committee Chair Max Scott asked Sallie to prepare a to-do list and circulate it to everyone. He wants it to include subcommittee list of all committees and its members

Mary Suther asked what is "charge" from TIGTA? Max asked Mary to please come up with a subcommittee goal.

DAT SCORING

Sallie began the process of DAT scoring.

Jim covered issues that came up with DAT. He distributed a 2 pg document titled "Scoring IRS Notices Using the Document Assessment Tool". We will post to TAP Space; also see Document #2 "DAT Scoring Standards" also to be posted to tapSPACE.

Jim mentioned that when a low score is given to please give recommendations on how the score can be raised. He also stated that Geoff and Lisa don't want TAP to evaluate their own work.

DAT is licensed for IRS use and can be used to score documents. It can't be used outside the IRS.

Sallie explained the use of the DAT and how the TAP uses it to score documents (i.e., letters, forms, documents and correspondence). Items are prioritized and then scored.

Sallie will send the CP. 23, 24, and 25 to the DAT scoring subcommittee.

Panel members were placed in teams of three and did some scoring.

Subcommittee reported out and all four teams reported out on the notices scored.

CLOSING REMARKS

Committee Chair Max Scott expressed Bernie's appreciation for the members' participation and cooperation.

Next teleconference is scheduled for April 5, 2007.



**Taxpayer Advocacy Panel (TAP)
Issue Committee
Wage & Investment (W&I) Reduce Taxpayer Burden
(Notices)**

**Meeting Minutes (Teleconference)
March 1, 2007 1:00 PM – EST**

Designated Federal Official (DFO)

Nancy Ferree, TAP Program Manager, Plantation, FL

Members Present

Ben Chapman
Paul Colombo
Steven Fulkrod
Joe Hurr
David Meister
Neil Mitchell
Max Scott
Howard Stahl
Mary Suther
Chuck Tice
Edward Uhrig
Warren Wong
J. T. Wright

Members Absent

Lee Congdon
David Jones
Lee Stieger

Staff Present

Anita Fields, TAP Staff & Note taker
Jim Cesarano, IRS Program Owner Representative
Sallie Chavez, Program Analyst

Welcome & Announcements

Committee Chair Max Scott opened the meeting by welcoming panel members and asked TAP staff Anita Fields to call roll. It was noted that there were no citizens were present.

Roll Call

Quorum was met.

Approve Meeting Minutes

Chair Max Scott decided to approve minutes at Face-to-Face (F2F) and Sallie will transport them.

Comments from Program Owner

Program Owner Representative Jim Cesarano discussed new project Form 12153 (Due process hearing request).

TIGTA reported on needs of visually impaired. TIGTA program manager will be at F2F meeting this month.



Exam wants Form 886-H re-written and also Notice CP 75 has been re-written.

Chuck Tice would like to have forms prior to F2F for review.

Subcommittee Report and Updates

Document Assessment Tool (DAT)

Joe Hurr is Vice Chair, therefore he is the leader of DAT teams.

Joe Hurr had nothing to report.

Stuffer Project

Lee Congdon is the lead. Dave had nothing to report. Sallie sent disk and all information to new subcommittee members.

Direct Mail Marketing

Lee Congdon is lead. Nothing to report.

Document Assessment Tool (DAT) Scoring

Sallie stated that she is doing the training for DAT and she rearranged some of the members on the team.

Dynamic Project Team

Ed Uhrig was appointed as lead. Nothing to report

Vision Impaired (TIGTA) Project

Nothing to report. TIGTA will be giving report at F2F meeting.

Combined Forms & Testing Project

No action to report on this.

Warren Wong asked where he could find subcommittee reports and info. Go to TAP Space. Sallie will check within 1 day to update Tap Space.

Ben Chapman asked about call of low income taxpayer collections.

Face to Face Meeting

Sallie gave all information on travel plans for F2F meeting in Atlanta.

Meeting Close

Chair Max Scott encouraged panel members to complete subcommittee report document on TAPSpace prior to the face-to-face meeting.

The Notices Issue committee meeting was adjourned.

Next meeting will be March 14, 15, 16, 2007 at F2F in Atlanta.



**Taxpayer Advocacy Panel (TAP)
Issue Committee
Wage & Investment (W&I) Reduce Taxpayer Burden
(Notices)**

**Meeting Minutes (Teleconference)
February 1, 2007 1:00 PM – EST**

Designated Federal Official (DFO)

Nancy Ferree, TAP Program Manager, Plantation, FL

Members Present

Ben Chapman
Paul Colombo
Steven Fulkrod
Joe Hurr
David Jones
David Meister
Max Scott
Howard Stahl
Lee Stieger
Mary Suther
Chuck Tice
Edward Uhrig
Warren Wong
J. T. Wright

Members Absent

Lee Congdon
Neil Mitchell

Staff Present

Isai Pallango, TAP Staff & Note taker
Jim Cesarano, IRS Program Owner Representative

Welcome & Announcements

Committee Chair Max Scott opened the meeting by welcoming panel members and asked TAP staff Isai Pallango to call roll. It was noted that Program Analyst Sallie Chavez will not be attending and no citizens were present.

Roll Call

Quorum was met.

Comments from Program Owner

Program Owner Representative Jim Cesarano provided updates of EITC forms and stated that changes has been made for 2006 and will change again in the future. Cesarano emailed a copy of forms to Program Analyst Sallie Chavez and will continue revising forms and anticipates participation from all panel members.

Cesarano stated that Program Team will continue working with all panel members and will share more information of CP-75 re-write during face-to-face meeting in New Orleans. Program Owners requested from all panel members to review DAT and provide and DAT score with details.



Cesarano stated that Combined Forms and Testing team should provide comments on testing guide and present information during next month teleconference meeting. It was stated that panel members working on this issue should create a document of research.

Program Owner Cesarano requested questions or comments from all panel members. Chair Max Scott stated his pleasure with the update and work being issued to panel members. It was stated by Chair Scott that panel members should contact Internal Revenue Service personnel to receive proper research information.

Subcommittee Report and Updates

Stuffer Project

Panel members J.T. Wright, David Meister stated nothing new to report. This subcommittee will gather more information and share during next month teleconference meeting. It was also noted that panel members Lee Congdon, Steve Fulkrod, and Ben Chapman will continue this subcommittee. All panel members agreed by consensus.

Direct Mail Marketing

Panel member Mary Suther stated nothing new to report. Suther also shared an internet article of "Copy Writer for Direct Mail." Panel members Lee Congdon, Howard Stahl, and Mary Suther will continue this subcommittee. All panel members agreed by consensus.

DAT Scoring

Panel member Joe Hurr stated nothing new to report. Chair Max Scott shared that Program Analyst Sallie Chavez will have issues for new panel members and proper training procedures during face to face meeting in New Orleans.

Chair Max Scott stated he created a document and currently on TAPSpace. Chair request all subcommittees to properly document progress report and identify team-leader member. Scott requests this document to be completed prior face-to-face meeting. All panel members agreed by consensus.

Vision Impaired (TIGTA) Project

Panel member Mary Suther will continue leading this subcommittee along with the participation of Lee Stieger, David Jones, and Edward Uhrig forming this subcommittee. All panel members agreed by consensus.

Suther mentioned her meeting with President / CEO of Citizens with Disabilities and gathered valuable information and shared with all panel members.

Combined Forms & Testing Project

Panel member David Jones will continue leading this subcommittee along with the participation of Joe Hurr, Neil Mitchell, and Ben Chapman forming this subcommittee. All panel members agreed by consensus.

Program Owner Jim Cesarano mentioned that it will benefit TAP members to document a report as soon as possible. Panel member David Jones will contact other subcommittees and report information during next teleconference meeting.

Face to Face Meeting

DFO Nancy Ferree stated that face-to-face meeting will be held in Atlanta, GA March 14-16, 2007. Program Analyst Chavez will e-mail travel request forms to all panel members; forms should be directed to TAP staff Isai Pallango.



Meeting Close

Chair Max Scott encouraged panel members to complete subcommittee report document on TAPSpace prior to the face-to-face meeting.

The Notices Issue committee meeting was adjourned.

Next meeting will be March 1, 2007 at 1: 00 PM EST.



**Taxpayer Advocacy Panel (TAP)
Issue Committee
Wage & Investment (W&I) Reduce Taxpayer Burden
(Notices)**

**Meeting Minutes (Teleconference)
January 4, 2007 1:00 PM – EST**

Designated Federal Official (DFO)

Nancy Ferree, TAP Program Manager, Plantation, FL

Members Present

Ben Chapman
Paul Colombo
Lee Congdon
Steven Fulkrod
Joe Hurr
David Jones
David Meister
Max Scott
Howard Stahl
Mary Suther
Chuck Tice
Edward Uhrig
Warren Wong

Members Absent

Lee Stieger
J. T. Wright

Staff Present

Sallie Chavez, TAP Program Analyst
Isai Pallango, TAP Staff & Note taker
Jim Cesarano, IRS Program Owner Representative

Welcome & Announcements

Committee Chair Max Scott opened the meeting by welcoming members and stated that The Federal Register Announcement was not completed. It was noted that this Notice Committee meeting will be non-formal and no formal notes will be needed.

Roll Call

Quorum of 8 was met; 13 members were present

Comments from Program Owner

Program Owner Representative Jim Cesarano provided updates of new team called Combined Forms and Testing and added that he has been attending meetings with team leader Debra Lopez. It was stated that panel members will need to participate in the testing process of the project.

Cesarano stated that a guidebook was created for the team and a TAP subcommittee was formed to determine how TAP members would work with the testing guide. DFO Nancy Ferree requested a copy of testing guidebook and Jim Cesarano stated that he would provide a copy when contacted.



It was also stated by Cesarano that overall Notice Program currently on "Continuous Resolution" and will be for the long-term. Internal Revenue Service Program Owner Sidney Gardner currently working on SPOC coordinator and work may be coming in from different directions.

Chair Max Scott stated that a 30-day turnaround would be reasonable if Program Analyst Sallie Chavez approves. Chair Scott requested 1-2 weeks notice to appoint an AD HOC team to properly act in response to issue. Cesarano will contact analyst Chavez and work on details of appointing a team and assignments. It was agreed that Chavez and Cesarano will meet next week and report conclusion to Chair Max Scott.

Panel member Ben Chapman asked if conclusion would be made available to entire committee, but Chavez indicate it would be sent to only subcommittee panel members because of the size and cost issues.

Panel member Warren Wong asked panel members to please stated name before speaking; Chair Scott agreed.

Subcommittee Report and Updates

DPT (CP23, 24, & 25)

Committee Member Joe Hurr previously team-up with analyst Chavez on this issue, but no longer because of his newly appointed Chair responsibilities. Chavez stated that panel members needed for subcommittees. It was stated that Edward Uhrig will replace Joe Hurr. All panel members agreed by consensus.

Chavez stated that panel members Lee Stieger, Warren Wong, and Edward Uhrig will form this subcommittee. All panel members agreed by consensus.

Stuffer Project

Panel members J.T. Wright, David Meister, and Lee Congdon previously formed this subcommittee, but J.T. Wright participation limited because of newly appointed Chair responsibilities. Chavez stated that two panel members needed to replace J.T. Wright. It was noted that panel members Lee Congdon, Steve Fulkrod, and Ben Chapman will form this subcommittee. All panel members agreed by consensus.

Direct Mail Marketing

Panel members Lee Congdon, Howard Stahl, and Mary Suther will form this subcommittee. All panel members agreed by consensus.

Vision Impaired (TIGTA) Project

Panel member Mary Suther will lead this subcommittee along with the participation of Lee Stieger, David Jones, and Edward Uhrig forming this subcommittee. All panel members agreed by consensus.

Combined Forms & Testing Project

Panel member David Jones will lead this subcommittee along with the participation Joe Hurr, Neil Mitchell, Ben Chapman forming this subcommittee. All panel members agreed by consensus.

Program Owner Representative Jim Cesarano will follow up on the Vision Impaired project with Debra Lopez and report information to Program Analyst Sallie Chavez in the near future.



Self-Assessment / Annual Report

Committee Chair Max Scott stated that Face-to-Face Meeting will be in March and Program Analyst Chavez indicated she would likely schedule meeting March 14-16, 2007, but location still pending. Chair Scott stated that he would greatly appreciate all panel members to attend.

Meeting Close

Chair Max Scott encouraged panel members to input personal information on TAPSpace and that he is in the process of completing Annual Report. Panel member Warren Wong questioned who will be leading subcommittees; if no leader, Chair Max Scott and Chavez will appoint leaders.

The Notices Issue committee meeting was adjourned.

Next meeting will be February 1, 2007 at 1: 00 PM EST.