



2010 Meeting Minutes SBSE Toll Free Project Committee

- December 9, 2010
-

Taxpayer Advocacy Panel SBSE Toll Free Project Committee Meeting Minutes December 9, 2010

Designated Federal Official

Judi Nicholas

Attendance

Kirsten Ball
Harlan (Doc) Barnett
Paulette Germain-Bekolo
Richard (Rich) Bilancia
David Cain
Linda Gambardella
Deidre (DeDe) Jackson
John Lees
Susan Lynn
Anne Rasmussen
Cliff Young

Staff

Janice Spinks, TAP Analyst (in part)
Tim Shepard, TAP Analyst
Nina Pang, TAP Analyst
Kymberly Hand, Secretary
Tonjua Menefee, SBSE Program Analyst
Martha Tobias, SBSE Program Analyst
Mike Landsmann, Tax Analyst, SBSE Campus Correspondence Examination

Opening/Welcome/Announcements

Judi opened the meeting and welcomed everyone. Members and staff did introductions and roll call was taken.

Staff Support

Judi reviewed the Seattle staff support and their role for this project committee. She explained that Tim Shepard would be the primary analyst supporting the committee. Tonjua reviewed her role and the SBSE role for this project. Tonjua provided information on how SBSE works with TAP. Judi explained who subject matter experts (SME) are and what they will do for the committee.

SBSE Projects for 2011

Mike Landsman stated that Carol Spencer will be the SME for the committee, but she was unable to make the call, so he is filling in for her. Mike provided a brief background of correspondence examinations, stating that they are more efficient because they are done through the mail rather than face-to-face.



The committee project is to provide feedback on the Intelligent Contact Management (ICM) System to determine if it is benefitting the taxpayers calling the Correspondence Toll-Free line. Mike explained that the notices currently being mailed have the dedicated phone number for correspondence examination and are routed through the ICM system. .

Action Item: Mike will provide copies of the Correspondence Examination IRM sections and copies of the notices for the staff to share with the committee members.

Calls are routed to employees based on training and experience level. Each campus has their own telephone script that is used for routing calls. The committee is tasked with making recommendations to enhance the script to provide better service to the taxpayer. Mike provided the committee both the SBSE and W&I correspondence examination toll-free telephone numbers for future reference.

Action Item: Mike will provide top ten types of calls (live and self-help) received.

Mike provided details on the “Where’s my correspondence” automated line and asked that the committee provide feedback to ensure that enhancements to this line have decreased issues for taxpayers. Callers typically fall into three categories:

- Was correspondence received
- Looking for their refund
- Checking on progress of correspondence exam audit

Chair and Vice Chair Elections

Judi reviewed the previous election process. All members agreed to use the same process as used previously.

Harlan Barnett was nominated and elected as Chair.

David Cain nominated Cliff as Vice-chair. Cliff declined and nominated Deidre (DeDe) Jackson, who accepted the nomination and was elected Vice-Chair.

Sub-Committee Assignments/Leads

There will be two subcommittees

- 1) Intelligent Contact Management (ICM) - Telephone scripts:
Roger Lees (lead), Rich Bilancia, Linda Gambrella, Anne Rasmussen, Tom Wechter, Harlan Barnett

This subcommittee will meet monthly on the 2nd Tuesday at 10am PST

- 2) Automated Self Help – Additional topics for self-help, additional items to populate & enhancing the system:
DeDe Jackson (lead), Kirsten Ball, Susan Lynn, Paulette Germain Bekolo, Cliff Young, David Cain

This subcommittee will meet monthly on the 3rd Thursday at 9am PST

Action Item: Judi will identify and share other TAP issues on correspondence examination toll free.

Establish a Meeting Quorum

Judi reviewed the quorum requirements from the past and by consensus, the committee decided that the quorum requirement will be 50% plus one.

Face-to-Face Meeting Dates and Location

Face-to-Face meeting dates will be May 16th and 17th and will be two full days.

Establish Conference Call Meeting Dates



Full Committee monthly phone conferences will be held on the 4th Tuesday at 9am PST

Program Owner Comments

None

Member Comments

Harlan thanked everyone for choosing him as chair. He also encouraged everyone to set up an email distribution group.

Harlan also passed out the SBSE ground rules.

Action Item: Harlan asked Tim to include the ground rules on the bottom of each agenda.

Closing

Judi closed the meeting.