



2008 Meeting Minutes Taxpayer Assistance Centers (TAC) Issue Committee

- December 4, 2008
- November 25, 2008
- October 28, 2008
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- August 26, 2008
- July 22, 2008
- June 24, 2008
- May 29-31, 2008
- April 22, 2008
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- February 26, 2008
- January 29, 2008

Taxpayer Assistance Centers (TAC) Committee Face to Face Meeting Minutes Thursday, December 4, 2008

Program Owners

- Leslye Baronich - Director, Field Assistance
- Michelle Jones - Information Technology Specialist
- Beth Braddock - Policy Analyst
- Elizabeth Restaino - Program Analyst

Committee Members Present

- Bensen, Milissa - Hermiston, OR - Member
- Bohrer, Herbert - Springfield, ID - Member
- Conder, Dean - Lakewood, CO - Member
- Leggett, John - Canterbury, NH - Member
- McAulay, Louise - Florence, SC - Member
- Monnier, David - Indianapolis, IN - Member
- O'Neill, Patricia - San Jose, CA - Member
- Spiotto, Ann - Lincolnwood, IL - Member
- Thompson, Tommy - Southaven, MS - Member
- Werner, Mary Jo - La Crosse, WI - Member
- Dan Fretheim - Decorah, IA - Member

Committee Members Absent



TAP Staff

- Block, Roy - Milwaukee, WI - Manager
- Delzer, Mary Ann - Milwaukee, WI - Program Analyst
- Smiley, Ellen - Milwaukee, WI - Program Analyst
- Robb, Patti - Milwaukee, WI - Program Analyst
- Gabriel, Lisa - Milwaukee, WI - Secretary

TAC Issues for 2009

Leslye Baronich, Director of Field Assistance, discussed the issue that this committee will be working on for 2009. Specifically, we are asked to provide recommendations on "Improving the payment processing system" in the Taxpayer Assistance Centers.

Associated Strategic Issue: (Provided by Leslye Baronich) Wage and Investment Division manages all tax processing and toll-free customer service for all individual and business taxpayers as well as providing compliance and face-to-face services. The mission of Customer Assistance, Relationship and Education (CARE) is to assist customers in satisfying their tax responsibilities. The mission of Field Assistance is to enhance the taxpayer experience by providing face-to-face assistance facilitated and self-assisted service that resolve tax issues and educate the taxpaying public.

We continue to receive TAP issues via the TAP hotline concerning taxpayer's frustration when attempting to drop off a payment at one of our TACs. In the past TAC offices were equipped with drop boxes; and taxpayers had the ability to drop off and payment. Due to heightened security measures, all TAC drop boxes were required to be removed. In turn, all taxpayers had to be seen by an assistant to accept and process their payment. Taxpayers were provided a QMATIC or Q-lite ticket and asked to wait until their number was called. Taxpayer's wait time could increase if they have cash or requested an official receipt.

Outlined area(s) of focus:

- Analyze and [provide recommendations that will improve our payment process.
- Reduce customer wait time when making a payment
- Automation of issuing official receipts for non-cash/cash payments
- Reduction of missed opportunities to accept payment
- Analyze the current QMATIC process for recommended improvements
- Identify alternative methods of rotating the official receipt book (Form 809) to allow employees to utilize all employee skills

Educate Members on Taxpayer Assistance Centers (TAC)

There are 401 offices which have 401 different layouts. The concept that one size fits all doesn't apply to TAC. TAC is about 2,200 people strong; about 150 are in the headquarters office and the remainder are field positions. The TAC staffing structure ranges from one to two employees to as many as 22 employees. Some TACs have managers and some do not. The group manager is the lowest management level. There may not be a manager on site in smaller TACs. The next level up is the territorial manager that may have a staff of six to seven group managers. The territorial manager reports to an area director. An area director has seven territories. These directors are located in Andover, MA, Greensboro, NC, Atlanta, GA, Phoenix, AZ, and Fresno, CA. The list on IRS.gov website will show you where there is a TAC and its hours of operation, as well as location. The process in place for the TACs is that a taxpayer takes a number; however each taxpayer has a different issue so some maybe served sooner than others based on the needed assistance. This is called a QMATIC process and is used in the TACs. In the past if someone wanted to make cash payment they used to use a drop box, but due to heightened security they have been removed and now taxpayers actually have to see a person to make the payment.



The Program Owner suggests TAC members to go to the Field Assistance analyst to make appointments for visiting the TACs. When you make TAC visits, please don't just drop in. Give the TAC manager a call first to confirm your appointment. The specific process will be reviewed at a future teleconference and panel members will have a copy of the process.

The QMATIC process can be used to put people where they need to go, but perhaps there is a need to find a way to have better use of the QMATIC process. Individual Taxpayer Advisory Specialist (ITAS) or screeners are available, but more are available in the larger offices. ITAS are the technicians that help with tax law questions. ITAS can also take payments as that is a quick transaction. Not all TACs have the full range of QMATIC choices. The smaller TACs use QLITE. Smaller TACs that do not have screeners will have QLITE. Categories are established on a national level, but there are choices at a local level to use as far as what service that can be provided.

Michelle Jones, Field Assistance Analyst, spoke about the Objectives:

- Provide recommendations to improve processes in TAC
- Improve payment process
- Reduce wait time
- Work on the possibility of having automated payments
- Improve process with accepting cash
- Improvements QMATIC process
- Work on a process for receipt book – look for ways to improve that process. Person accepting cash cannot go into system to make adjustments of taxpayer's account. (This is Form 809 used for cash only transactions) not every employee in TAC has the Form 809 book. Form 3244 is used for check payment transactions. Analyst will provide copies of both forms to panel members.)

Subcommittees may be needed as our observations and work develops over the next few months. This need will probably occur after our TAC visits and observations in order to help us assimilate the data.

Elections (Roy Block)

2009 Chair - **Tommy Thompson**

2009 Vice Chair - **Milissa Bensen**

Ground Rules and Meeting Guidelines / Define Roles and Responsibilities (Roy Block)

It is important for everyone to identify themselves before speaking during monthly conference calls. If you are going to miss a meeting, make sure you let your analyst know. There is no need for use of titles, but there is a need to use your skills. Respect other panel member's opinions and skill sets. Also keep on point of the issues; stay focused. Take part in the discussion during teleconferences. Use Email etiquette. If working on subcommittee, email all panel members to keep all members posted on progress. It is important to be on every teleconference call and be aware of background noise; keep background noise to a minimum. The call in number and access code will be on the top of the agenda that is sent out by the analyst before each meeting.

Consensus was to keep Committee name as TAC instead of Field Assistance.

Establish a Meeting Quorum

50 percent plus one will establish quorum. These meeting are legal meetings and must be posted in the Federal Register Notices as these are public meetings.



Face to Face Meeting Dates and Location

Atlanta GA, Denver, CO, Las Vegas, NV
Dates: June 18, 19, and 20, with the meeting beginning on Thursday.
Gabriel will provide cost analysis for each area.

Establish Tele-Conference Call Meeting Dates

Every 4th Tuesday of the month at 1:00 pm CST.

Next Steps (Program Owner and Roy Block)

Each member will visit two TAC offices. It was suggested that January and February would be the best months. They should view the QMATIC and talk to the TAC manager. Smiley will make arrangements for members to visit offices and send out the appointment times. The PO will provide a list of the locations of the TACs and if they have full a QMATIC or QLITE.

ACTION: Smiley will send out a copy of Taxpayer Assistance Blueprint (TAB) to be sent out to all committee members. It is also available on irs.gov.

ACTION: Guidelines document provided by Program Owner Michelle Jones to the analyst to be given out to panel members for discussion at the next teleconference. The document will have objectives, time lines, and dates.

Program Owner Comments

Presentations were made to last year TAC members for their contributions. Each of those members received a certificate.

Meeting Assessment (New Chair)

Every member received a copy of the assessment which states strengths and weaknesses. One of the suggestions was to have a second face-to-face meeting. It would be more productive for this committee as historically, the teleconference meetings became longer and longer as the year progresses.

Closing (Roy Block)

Members please fill out evaluation sheet

Handouts provided by Analyst will be:

- Maps of area TACs
- Listing of TACs hours of operations, phone numbers and listing such as QMATIC and QLITE services
- Copy of Form 3244, Payment Posting Voucher
- Information on data on wait time
- Copy of TAB Report
- Copy of Form 809, Receipt for Payment of Taxes
- 2007 Report is on TAP Space
- Copy of IRM

Meeting Adjourned

Next Teleconference is Tuesday, January 27th at 1:00 pm CST



**Taxpayer Assistance Center (TAC) Issue Committee
November 25, 2008
Teleconference Minutes**

Program Owner Staff

Peggy Sue Unander
Michelle Jones

Members Present

Craig Capehart
Dean Conder
Dan Fretheim
Louise McAulay
Jerry Melchior
Wayne Whitehead, Chair

Members Absent

Bob Haines
Ed Johnson
David Monnier
Homer Sewell III
Ann Spiotto
Tommy Thompson

TAP Staff

Roy Block, Milwaukee TAP Program Manager
Judi Nicholas, Seattle TAP Program Manager
Dave Coffman, Seattle TAP Analyst
Patti Robb, Milwaukee TAP Analyst
Ellen Smiley, Milwaukee TAP Analyst
Lisa Gabriel, TAP Secretary
Marla Ofilas, TAP Secretary

Opening

Judi opened the meeting and Wayne welcomed everyone. Judi introduced the Milwaukee TAP staff. They will support the committee in 2009.

Roll call was taken and a quorum was not met.

Minutes Approval

The committee reviewed the minutes from the October 28, 2008 meeting.

DECISION: The committee approved the minutes with no changes or corrections.

TAC Report Printing Update

Michelle stated that the printed report was mailed to the Seattle office on November 17. Wayne noted that the final report turned out great. Craig agreed and felt that Wayne did a great job organizing the committee.

Wayne asked Michelle to explain the new issue for 2009. Michelle informed the committee that the focus in 2009 will be on the Q-Matic system and the payment process.

Michelle thanked the members for their hard work, effort, and dedication to the 2008 project.



Member Comments

Roy explained that the Milwaukee office will select the committee dinner location and make reservations.

Wayne reminded the members that chair training is on Friday, December 5. Members interested in pursuing a chair or vice-chair position should be prepared to extend their stay for the annual business meeting.

Program Owner Comments

Peggy Sue commented that she was very impressed with the whole process and excited to begin the next issue.

Closing

Judi thanked the retiring members for their hard work. They will be missed. Judi also thanked everyone for participating in the meeting.

Judi closed the meeting.



**Taxpayer Assistance Center (TAC) Issue Committee
October 28, 2008
Teleconference Minutes**

Program Owner Staff

Peggy Sue Unander
Michelle Jones
Frank Nolden

Members Present

Craig Capehart
Dean Conder
Dan Fretheim
Bob Haines
Ed Johnson, Vice-Chair
Louise McAulay
Jerry Melchior
Homer Sewell III
Ann Spiotto
Tommy Thompson
Wayne Whitehead, Chair

Member Absent

David Monnier

TAP Staff

Mary Ann Delzer, Acting TAP Program Manager
Dave Coffman, TAP Analyst
Nina Pang, TAP Analyst

Opening

Mary Ann opened the meeting. Wayne reviewed the agenda. Roll call was completed and a quorum was met.

Minutes Approval

The committee reviewed the September 23, 2008 meeting minutes.

DECISION: The committee approved the minutes with no corrections.

Mock-up Review

Wayne informed the members that he has reviewed the report revisions. Dave will make any edits, convert the document to a PDF format and submit the document this week. The committee reviewed the entire document and agreed to some minor edits.

ACTION ITEM: Ann will rewrite the second paragraph in the report's executive summary and email it to Dave.

DECISION: The committee agreed to all edits as discussed.

ACTION ITEM: Dave will incorporate the edits into the final report and submit the final report to Program Owner Leslye Baronich. Dave will also send the report to Michelle for printing.



Next Steps

Wayne outlined some actions that the committee will need to take in the coming months.

First of all, Wayne, Dave and Judi will compose an agenda for the TAC Committee meeting in December. This meeting will take place at the annual TAP business meeting, outside Washington, DC. If for some reason Wayne is unable to attend the annual meeting, Ed will step in as vice-chair and conduct the December meeting. Judi will oversee the election for the new chair and vice-chair. When elected, the new chair and vice-chair will assume their roles and facilitate the rest of the meeting.

Wayne will send in the Strength, Weakness, Opportunity and Threats (SWOT) analysis in a couple of weeks.

Last year at the annual meeting, the TAC committee gave an oral presentation. There will not be an oral presentation this year. Instead, the TAC report will be distributed to the TAP members.

ACTION ITEM: Wayne would like a volunteer to work with Dave on the group dinner during the annual meeting. If anyone is interested, please email Wayne.

Within the next few weeks, Wayne will submit the annual report of the committee. This report will become part of the annual TAP report.

Program Owner

Peggy Sue had no additional comments.

Member Comments

The next meeting will be scheduled for Tuesday, November 25th (which is during Thanksgiving week). This meeting will be short. There is also the possibility of having new panel members assigned by the next meeting.

Bob Haines and Jerry Melchior said their good-byes, since they are third year panel members.

Mary Ann thanked the three third-year members. Peggy Sue also gave her thanks to all the panel members.

Closing

Mary Ann closed the meeting.



**Taxpayer Assistance Center (TAC) Issue Committee
September 23, 2008
Teleconference Minutes**

Program Owner

Peggy Sue Unander
Michelle Jones

Members Present

Craig Capehart
Dean Conder
Dan Fretheim
Bob Haines
Ed Johnson, Vice-Chair
Louise McAulay
Jerry Melchior
David Monnier
Ann Spiotto
Tommy Thompson
Wayne Whitehead, Chair

Member Absent

Homer Sewell

Guest

Bob Fett, Local Taxpayer Advocate

Staff

Judi Nicholas, TAP Program Owner
Marla Ofilas, TAP Secretary

Opening

Wayne opened the meeting and welcomed the participants. Roll call was completed and a quorum was met.

Minutes Approval

The committee reviewed the August 26, 2008 meeting minutes.

DECISION: The committee approved the minutes with no corrections.

Mock-up Review

Wayne informed the members that they should have received a recent draft of the report. Wayne asked them to review the draft and submit their edits and comments, using the reviewing tools (edit and comment features) in MS Word. If editing in MS Word is not possible, members should list their edits and comments in an e-mail.

ACTION: By October 4, 2008, members will e-mail their comments and edits on the draft report to Dave, Nina and Wayne.

Wayne would like to distribute the final report to all TAP members and conduct a short presentation on the recommendations at the annual meeting. Judi noted that the Joint Committee will work on the annual meeting agenda at their upcoming face-to-face meeting. After the meeting, Judi should know if there is time available for a short presentation. Wayne asked the members to be prepared to present the committee's recommendations at the annual meeting.



Louise questioned the numbering system of the recommendations and rationales. Wayne felt that the existing system was adequate, but after further discussion from the committee, the members concluded that a more conventional numbering system should be used. Judi noted, although the members understand the existing numbering system, the public might not. The report needs to be clear to all readers.

ACTION: Wayne will ask fellow TAP member Kelly Wingard to review the report and comment on the numbering system for recommendations and rationales.

Program Owner

Peggy Sue had no additional comments but feels the members are headed in the right direction with the report.

Comments

Wayne asked the members to start thinking about electing a new chair and vice-chair for the TAC committee. The election process will take place when the TAC committee meets during the annual meeting.

Louise asked if the committee would meet in November. Wayne felt that the members could decide during the October meeting. Judi explained that a federal register notice for the November meeting would need to be sent prior to the October meeting. If, during the October meeting, members decide not to hold a November meeting, the federal register notice for November could still be cancelled.

DECISION: The committee agreed to keep the November meeting as scheduled. The committee will determine if a November meeting is necessary when they meet on October 28, 2008.

Closing

Wayne thanked everyone for their participation and closed the meeting.



**Taxpayer Assistance Center (TAC)
Issue Committee Minutes
August 26, 2008**

Program Owner Staff

Leslye Baronich, Program Owner
Michelle Jones
Frank Nolden

Members Present

Craig Capehart
Dean Conder
Dan Fretheim
Louise McAulay
Jerry Melchior
David Monnier
Homer Sewell III
Ann Spiotto
Tommy Thompson
Wayne Whitehead, Chair

Members Absent

Bob Haines
Ed Johnson

TAP Staff

Judi L Nicholas, TAP Program Manager
Dave Coffman, TAP Analyst
Nina Pang, TAP Analyst
Marla Ofilas, TAP Secretary

Opening

Wayne opened the meeting. Marla took roll and a quorum was met.

Introductions

Wayne introduced the newly appointed Field Assistance Director, Leslye Baronich and the new Chief of Headquarters Staff, Frank Nolden.

Leslye, a 28-year employee with the IRS, currently reports to the director of Customer Assistance, Relationships and Education (CARE). Leslye previously served as director of Stakeholders Partnerships Education & Communication (SPEC) Field Operations. She also served as the SPEC area director in New Orleans.

Leslye introduced Chief of Headquarters Staff, Frank Nolden, a 20-year employee who began his career as a Revenue Officer. Frank joined Field Assistance as a group manager and most recently served as a territory manager in Las Vegas.

Minutes Approval

The committee had an opportunity to review the minutes from the July 22, 2008 meeting.

DECISION: The committee approved the July 22, 2008 minutes as presented.



Mock-up Review

- **Review Edits**

Wayne reported that the intent of today's meeting is not to review the document line by line, but to discuss both versions of the report and to determine which version the committee would like to pursue.

Dave informed the committee that the edits he received from the members were both grammatical and structural. Nina condensed the edits into two mock-ups. Mock-up A reflects the structural changes and mock-up B reflects the grammatical changes. Dave also explained that Nina inserted comments of what was deleted in each mock-up.

Wayne recommended using mock-up A as the primary document, blending in the changes from mock-up B into mock-up A. Wayne asked Dave and Nina to continue blending in both reports and send a draft out to the committee members in a couple of weeks. He also asked Dave and Nina to include the information from page 5 of the Summary of TAC Observations with the heading, "While not directly related to the return preparation process, these observations may have an effect on the return preparation process:" Office space, layout, accessibility and parking; privacy problems within the TAC; and self-help services/kiosks. Wayne felt that the observations would assist field assistance management with their long-term planning.

DECISION: All committee members agreed with Wayne's proposal. Dave and Nina will contact Wayne if questions arise regarding the consolidation of the two reports.

ACTION: Dave and Nina will provide the members with a draft of the consolidated report by mid-September.

Wayne would like the committee to review the consolidated report in September. In addition, the executive summary and table of contents needs to be included with the report. The final document should be ready to send to the printers in November.

The final grammar review will be conducted by Wayne, Nina, Judi and Dave. Wayne felt that having too many people involved could slow the editing process.

- **Theme**

Wayne felt that the underlying theme of the report should recognize the importance of the TAC customer's time. The report should also recognize methods to streamline the tax return preparation process, given the constraints that currently exist. Wayne also suggested the report contain the most important recommendations toward the beginning of the document, and the less important recommendations toward the end.

Judi asked the committee to consider an author for the executive summary. Wayne would like Dave and Nina to draft the executive summary. In addition, Wayne would like the committee to adopt the format used in the last report for the acknowledgements section.

- **Printing Update**



Michelle confirmed the printing style with the members. The members decided on the following:

- Spiral binding
- Same quality paper that was used in last year's report
- Back-to-back printing
- 150 copies
- Approved graphics will appear on the cover page
- All members who are retiring will receive a copy of the report

Program Owner Comments

Michelle had no additional comments.

Member Comments

The members made no additional comments.

Closing

Wayne thanked everyone for participating and closed the meeting.



**Taxpayer Assistance Center (TAC)
Issue Committee
Teleconference Minutes
July 22, 2008**

Program Owner

Michelle Jones, TAC Analyst
Peggy Sue Unander, TAC Supervisory Analyst

Members Present

Craig Capehart
Dan Fretheim
Bob Haines
Louise McAulay
Jerry Melchior
David Monnier
Ann Spiotto
Tommy Thompson
Wayne Whitehead, Chair

Members Absent

Dean Conder
Ed Johnson
Homer Sewell III

Guests

Malene Tolbert
Bob Fett, Vermont Local Taxpayer Advocate

Staff

Judi L Nicholas, TAP Program Manager
Dave Coffman, TAP Program Analyst
Nina Pang, TAP Program Analyst
Marla Ofilas, TAP Secretary

Opening

Wayne opened the meeting. Roll call was completed and a quorum was present.

Minutes Approval

The committee had an opportunity to review the minutes from the May 29 – 31, 2008 and June 24, 2008 meetings.

DECISION: The committee approved the May 29 – 31, 2008 and June 24, 2008 minutes with no additional changes.

Subcommittee Reports

The Appointment Process, Tax Return Preparation, and Customer Screening subcommittees provided a brief update on their current activities. Each subcommittee submitted a draft of their recommendations and rationales to Dave Coffman. Shortly thereafter, all recommendations and rationales were included in a working mock-up report for all members to review.

Next Actions

Each member will review the mock-up and provide their comments and recommended changes to Dave Coffman. Wayne reminded the committee to courtesy copy him on all e-mails. Wayne hopes to have the report finalized by October and sent for printing in November.



Program Owner Comments

Peggy Sue thanked the subcommittees for their work. She is excited to see the final product. Peggy Sue announced that Field Assistance Director, Beth Tucker, has left Field Assistance to work directly for IRS Commissioner Shulman. She is no longer the committee's program owner. The IRS has not announced a new director.

Member Comments

Wayne provided a short report on some recent activities of the Joint Committee. Wayne stated that the Joint Committee decided to allow new and returning members to run for committee chair positions. Any members interested in a chair position should be prepared to stay an additional night in Washington DC, following the TAP annual business meeting. Chair training will take place immediately after the annual business meeting.

Wayne also noted that returning members will have an opportunity to select and serve on an issue committee of their choice in 2009.

Wayne suggested that the committee consider cancelling the November committee meeting.

DECISION: In October, the committee will decide whether a November conference call is needed.

Closing

Wayne thanked everyone for their participation. Judi closed the meeting.



**Taxpayer Assistance Center (TAC)
Issue Committee
Teleconference
June 24, 2008**

Program Owner

Peggy Sue Unander, TAC Supervisory Analyst
Michelle Jones, TAC Analyst

Members Present

Craig Capehart
Dan Conder
Dan Fretheim
Bb Haines
Ed Johnson, Vice-Chair
Louise McAulay
Jerry Melchior
David Monnier
Homer Sewell III
Ann Spiotto
Tommy Thompson
Wayne Whitehead, Chair

Member Absent

Regina White

Guest

Malene Tolbert, Tax Analyst

Staff

Judi Nicholas, TAP Program Manager
Dave Coffman, TAP Program Analyst
Marla Ofilas, TAP Secretary

Welcome/Announcements

Wayne opened the meeting and welcomed the participants. Marla took roll call and a quorum was met.

Subcommittee Report Out

Each subcommittee provided a brief update on their current activities and next steps.

- **Customer Screening Subcommittee**

Bob reported that Ann did a wonderful job on the check sheet. The subcommittee is now ready to wrap up their report.

- **Tax Return Preparation Subcommittee**

Ed reported that the subcommittee reviewed and refined their list of recommendations.



The subcommittee is now ready to work on rationales for their recommendations and will provide a draft by the next full committee teleconference.

- **Appointment Process Subcommittee**

Dave M. reported that the subcommittee met and had a thorough discussion on the recommendations, some of which were changed. Dave continued to explain their findings.

The subcommittee will hold another meeting to discuss and implement their next steps.

Program Owner Comments

Peggy Sue thanked the subcommittees for their recommendations. She felt that Field Assistance will be able to look at the recommendations, whether they are short-term fixes or long-term fixes, and improve the process.

Joint Committee Comments

Every year, selected members of TAP, with Taxpayer Advocate Nina Olson and TAP Director Bernie Coston, meet with the IRS Commissioner. One of the items on the agenda for this year is to brief the Commissioner on the project being worked by the TAC Issue Committee. Wayne will draft some talking points and share them with the committee for their input. The talking points will be used by TAP Chair Hank Mosler when he meets with the Commissioner.

ACTION: Wayne will draft some committee talking points and e-mail them to the members for their review and input.

Member Comments

There were no member comments.

Closing

Wayne thanked everyone for their participation. Judi closed the meeting.



**Taxpayer Assistance Center (TAC)
Issue Committee
Face-to-Face Meeting
Denver, CO
May 29 – 31, 2008**

Program Owner

Beth Tucker
Michelle Jones, TAC Analyst
Peggy Sue Unander, TAC Supervisory Analyst

Members Present

Craig Capehart
Dean Conder
Daniel Fretheim
Bob Haines
Ed Johnson, Vice-Chair
Louise McAulay
Jerry Melchior
David Monnier
Homer Sewell III
Ann Spiotto
Tommy Thompson
Wayne Whitehead, Chair

Member Absent

Regina White

Staff

Judi Nicholas, TAP Program Manager
Dave Coffman, TAP Program Analyst
Nina Pang, TAP Program Analyst
Marla Ofilas, TAP Secretary

Thursday, May 29, 2008

Opening

Wayne opened the meeting and thanked everyone for attending. A quorum was met. Judi reviewed the agenda.

Ice Breaker

Each participant made a brief introduction to the committee.

Meeting Minutes Approval

The committee had an opportunity to review the minutes from the April 22, 2008 meeting.

DECISION: The committee approved the April 22, 2008 minutes with no additional changes.



Program Owner Opening Comments

Beth thanked the members for taking the time to visit their local Taxpayer Assistance Centers (TAC).

Beth provided a brief update on filing season activities. Due to the distribution of Economic Stimulus Payments (ESP), there was an increase in the number of customers visiting TACs. Many TAC employees worked overtime and provided Saturday service to accommodate the demands. Field Assistance is now considering Saturday service because many customers are unable to take time off work during the week to visit their local TAC. In addition, many customers that entered the TACs on "Super Saturday," were not there for ESP assistance. Beth noted that return prep results were impressive. Overall, TACs experienced a 60% increase in walk-in traffic during this filing season. This increase was largely due to ESP.

History of the Committee

For the benefit of newer committee members, Judi provided some background on the TAC Committee. During the first two years after the committee was formed, panel members provided recommendations that led to changes in the Publication Method Guide (PMG), a desk aid used by TAC employees to answer tax law questions. The committee also reviewed and reported on TAC customer service, from the perspective of both the TAC customer and the TAC employee.

This year the full committee is charged with providing recommendations on improving the return preparation process, from beginning to end.

Taxpayer Assistance Blueprint (TAB2)

Judi explained the IRS was charged by Congress to develop a five-year plan for improving taxpayer service. The Taxpayer Assistance Blueprint (TAB) project was completed in two-phases. Phase one included preliminary research and Phase two provided recommendations on improvements.

Introduce Fishbone Diagram

Wayne introduced the process of using a fishbone diagram to outline the problems with the return preparation process. Wayne suggested that the committee focus on People, Policies, Procedures, and Miscellaneous as the causes in the diagram.

Each member summarized his/her TAC visit findings. Judi assisted in categorizing their findings.

As part of the fishbone diagram process, the committee reviewed a list of questions screeners use to determine if a customer qualifies for tax preparation assistance.

ACTION: The committee will review the list to see if improvements can be made.

End of the Meeting

Wayne briefed the committee on the discussion topics for Friday's agenda.

Beth felt that the committee is doing great. The member's observations have been accurate and she can't wait to get the report.

Closing

Judi closed the meeting.



Friday, May 30, 2008

Program Owner

Beth Tucker
Michelle Jones, TAC Analyst
Peggy Sue Unander, TAC Supervisory Analyst

Members Present

Craig Capehart
Dean Conder
Daniel Fretheim
Bob Haines
Ed Johnson, Vice-Chair
Louise McAulay
Jerry Melchior
David Monnier
Homer Sewell III
Ann Spiotto
Tommy Thompson
Wayne Whitehead, Chair

Member Absent

Regina White

Staff

Judi Nicholas, TAP Program Manager
Dave Coffman, TAP Program Analyst
Nina Pang, TAP Program Analyst
Marla Ofilas, TAP Secretary

Opening

Wayne opened the meeting and Judi made a few brief announcements.

Review Individual Reports

Judi reviewed the fishbone diagram and restated the observations that were made.

Beth reported that the TAC offices will no longer use cash conversion kiosks. During the pilot program, they found that an armored car service was needed to deposit the money into the Federal Reserve. In addition, the cost of renting the kiosk machines was \$5,000 a month for each kiosk.

Ann asked why a customer must present a Social Security card before getting his/her tax return prepared. Beth explained that the requirement is meant to prevent identity theft by validating the taxpayer's Social Security number.

Review Procedures of Other Agencies/Industries

Dean researched the Social Security Administration's process for accepting appointments from Social Security recipients. Dean reported that each region operates differently. Recipients use the Administration's toll free number to schedule appointments. Their computer system verifies appointments and an auto-dialer program reminds recipients of their appointment. Appointments can be made from anywhere in the country and, after the appointment is made, a confirmation letter is sent to the recipient with a list of documents he/she must bring for the appointment.



Ed researched the State Department's procedures for scheduling passport appointments. Ed found that the State Department has requirements that travelers must meet in order to schedule an appointment. Once the appointment is made, a reminder is sent to the traveler, listing the required documents needed for the appointment and the methods of submitting payment.

Ed also researched the appointment process for U.S. Embassies. Appointments are scheduled through a web-based system and a fee is required. Using the system, a citizen is able to select a convenient appointment time. The system will also show cancelled appointments, allowing citizens to make a same-day appointment. Citizens are able to make appointments 30 to 60 days in advance. After the appointment is made, an e-mail confirmation listing the documents needed for the interview is sent to the citizen.

Jerry provided insight on how the private industry schedules appointments. Jerry explained that private industry purposely overbooks appointments to address no-shows. Add-ons are inserted into the schedule to compensate for the no-shows.

Recommendations and Rationales

The committee brainstormed for potential improvements to the existing processes. They also discussed various rationales which can be used to support their recommendations for improvement.

Wayne suggested that the committee work as three subcommittees to formalize the recommendations; with each subcommittee working recommendations that are similar or related.

DECISION: The full committee agreed. Each member joined a subcommittee and a lead was chosen for each subcommittee. The following subcommittees were formed:

- **Tax Return Preparation Subcommittee – Ed (lead), Homer and Tommy**
- **Appointment Process Subcommittee – David (lead), Craig, Louise, and Dan**
- **Customer Screening Subcommittee – Bob (lead), Dean, Ann and Jerry**

Judi asked the committee when they expect to complete the report. Wayne felt that the goal is to have a final report by the end of November. Subcommittee reports should be completed by the end of August. This would give the committee time to consolidate and review the report as a whole.

Return Preparation Demonstration

Two Denver TAC employees provided a demonstration of the software that's used to prepare taxpayer returns.

After the demonstration, the members felt that TAC employees should have the technology to scan a Form W-2. The scan could populate all required fields in the computer's tax preparation software program. In addition, the members recommended that the Interactive Tax Law Assistant (ITLA) tool and the tax preparation software be combined to allow TAC employees the ability to answer tax law questions and prepare returns in one convenient program. For example, Turbo Tax is a very interactive program which prepares returns using probing questions.

Writing the Report and the Report Cover

Wayne provided a sample of a report cover. Wayne asked the members to e-mail their suggestions.

ACTION: Dave Coffman will e-mail last year's TAC report cover to the members. In addition, members that feel creative will e-mail their suggestions to Wayne.

Judi recalled how the TAC committee conducted subcommittee business in the past. Each subcommittee met monthly at a designated time and day. Dave Coffman was involved in each call. During each full committee meeting, the subcommittees provided a brief report on the tasks they've completed.



DECISION: The full committee agreed with the suggested process. Dave C. will e-mail potential dates to each of the subcommittees and arrange a conference call for all members to discuss their subcommittee activities, decide meeting times, etc.

Wayne said that he expects each subcommittee to prepare their portion of the report, which will include recommendations and rationales.

End of Day Announcements

There were no further announcements.

Closing

Judi closed the meeting.

Saturday, May 31, 2008

Program Owner

Michelle Jones, TAC Analyst
Peggy Sue Unander, TAC Supervisory Analyst

Members Present

Craig Capehart
Dean Conder
Daniel Fretheim
Bob Haines
Ed Johnson, Vice-Chair
Louise McAulay
Jerry Melchior
David Monnier
Homer Sewell III
Ann Spiotto
Tommy Thompson
Wayne Whitehead, Chair

Member Absent

Regina White

Staff

Judi Nicholas, TAP Program Manager
Dave Coffman, TAP Program Analyst
Nina Pang, TAP Program Analyst
Marla Ofilas, TAP Secretary

Opening

Wayne opened the meeting.



Next Steps

Wayne discussed the "Style" guide which was modeled after the IRS style guide. Dave C. explained that the committee's final report will be available to the public. Because of this, acronyms should be kept to a minimum. If any acronyms are used, they must be adequately explained.

David M. asked if it would be okay to contact TAC managers if their subcommittee has questions or needs assistance. Michelle indicated that it would be okay; however, the contact must be facilitated by Dave Coffman.

ACTION: Members will e-mail Dave Coffman if they are interested in returning to their local TAC.

Closing

Wayne asked the members if they were comfortable with the report writing process. All agreed.

Wayne thanked everyone for their participation.

Judi closed the meeting.



**Taxpayer Assistance Center (TAC)
Issue Committee Minutes
April 22, 2008**

Program Owner

Beth Tucker
Michelle Jones, TAC Analyst

Members Present

Craig Capehart
Dean Conder
Dan Fretheim
Jerry Melchior
David Monnier
Homer Sewell
Ann Spiotto
Wayne Whitehead, Chair

Members Absent

Bob Haines
Ed Johnson, Vice-Chair
Louise McAulay
Tommy Thompson
Regina White

Staff

Judi Nicholas, TAP Program Manager
Dave Coffman, TAP Program Analyst
Marla Ofilas, TAP Secretary

Opening

Wayne opened the meeting and welcomed the members. Roll call was taken and a quorum was met.

Approval of Minutes

The committee reviewed the minutes for March 22, 2008.

DECISION: The full committee approved the minutes for March 22, 2008 with no further comments or corrections.

TAC Visits

Wayne stated that four TAC visit reports have not been submitted. All reports are due to Dave Coffman by May 10. Dave will review the reports for common themes and prepare a summary. The summary will be shared at the face-to-face meeting.

ACTION: Members that have not submitted their TAC visit reports will e-mail them to Dave by May 10.

Next Steps

Wayne indicated that the committee is on track. The majority of the work will be completed during the face-to-face meeting in Denver.

TAC Face-to-Face Meeting in Denver

The lodging and flights for all members have been completed. The committee will meet in the IRS building on Thursday, May 29 and Friday, May 30. On the third and final day of the meeting, May 31, the committee will meet in the hotel.



Wayne reviewed a draft of the face-to-face meeting agenda. He will email a link to the Taxpayer Assistance Blueprint (TAB) report, which will be discussed at the Denver meeting. In addition to the TAB report, the committee will review and discuss the IRS Oversight Board report. The objective is to ensure members are aware of the current and future plans of the IRS.

ACTION: Wayne will email the link to the TAB report and the IRS Oversight Board report.

Wayne would also like to review the preliminary feedback on Taxwise. Beth suggested the committee limit their time reviewing the feedback, but felt it would be good to discuss what works well and identify areas that need improvement.

ACTION: Dave will provide copies of the Taxwise preliminary feedback at the face-to-face meeting.

Closing

Judi noted that the next meeting will be in Denver. Members should receive their travel packets one week prior to the meeting.

Judi thanked the members and Wayne closed the meeting.



**Taxpayer Assistance Center (TAC) Issue Committee
Meeting Minutes
March 25, 2008**

Program Owner

Beth Tucker
Michelle Jones, Field Assistance Analyst

Members Present

Craig Capehart
Dan Fretheim
Bob Haines
Louise McAulay
Jerry Melchior
David Monnier
Homer Sewell III
Ann Spiotto
Tommy Thompson
Wayne Whitehead, Chair

Members Absent

Dean Conder
Ed Johnson, Vice Chair
Regina White

Guests

Christine Kitts
Maylene Tolbert

Staff

Judi Nicholas, Program Manager
Dave Coffman, Program Analyst
Marla Ofilas, Secretary

Welcome/Opening

Wayne opened the meeting and welcomed the members. Roll call was taken and a quorum was met.

Approval of Minutes

The committee reviewed the draft minutes from January and February 2008.
DECISION: The minutes for January and February 2008 were approved.

TAC Visits

Wayne began by acknowledging the thorough reports recently submitted by Louise and Ann. Wayne asked Louise and Ann to share their observations with the committee.

During her visit, Louise observed that visitors were patient to wait for assistance, even though the wait time was longer than expected. Louise also found that the larger TAC offices are busier and complete larger numbers of both business and personal returns.

Louise identified two items of concern. One was signage and the other was the time spent screening a TAC customer. Beth asked Louise if she noticed, during the screening process, if customers had income that exceeded the TAC return preparation limit. Beth explained that customers bring in many returns that are considered "out-of-scope." This is why the screening process is so important. Judi



asked if statistics are kept on the number of returns that are out-of-scope for tax preparation assistance. Beth replied that Field Assistance does not keep statistics on out-of-scope returns.

Ann provided a brief report of her TAC visits in both a major metropolitan business district and a suburb. Ann discovered the importance of having an efficient receptionist in the TAC. A good receptionist makes the whole office run smoothly.

Ann continued by asking what the IRS is trying to achieve with the TAC offices? Beth answered that the mission is to provide a venue for taxpayers to seek direct assistance – defined as return preparation, account work, answering tax law questions and providing tax forms. Beth further explained that the TAC committee was charged with exploring and recommending different ways to make the return preparation process as seamless as possible, within the existing constraints. Ann asked about wait time. What is appropriate? Beth replied that there has been some serious discussion on wait time within Field Assistance. The focus of the discussion was on managing traffic and providing customers with realistic expectations when they visit their local TAC. An appropriate wait time is defined by the customers. Sometimes customers choose to wait a couple of hours while others choose to return another day when the wait time may be shorter.

While interviewing the TAC managers, Ann learned that the updates to the return preparation software are not always loaded timely on the TAC office computers. Wayne noted that there seems to be some concerns with the software. Wayne felt this was something which could be discussed at the face-to-face meeting.

Next Steps

Wayne reminded members to send their TAC observation reports to Dave. Dave will consolidate the reports and note any significant trends. The committee will review the consolidated report, draw conclusions and prepare recommendations at their upcoming face-to-face meeting.

Face-to-Face Meeting

Judi announced that the committee will meet in Denver. Marla will be contacting the members to begin travel arrangements.

The face-to-face meeting is scheduled for Thursday May 29 through Saturday May 31.

Program Owner Comments

Michelle felt if the committee continues with their hard work and dedication, the result will be a list of good recommendations. Beth noted that 320 TACs will be open on Saturday, March 29 to assist taxpayers with preparing their 2007 returns so they can receive their economic stimulus payment.

Closing

Beth thanked everyone for their hard work and is looking forward to receiving the recommendations. Wayne asked what the protocol is if members have follow-up questions for their local TAC manager. Michelle suggested that members work through Dave to establish follow-up calls.

ACTION: Members will contact Dave if they have follow-up questions for the local TAC managers.

Wayne thanked everyone for attending and closed the meeting.



**Taxpayer Assistance Center (TAC)
Issue Committee Meeting
Teleconference Minutes
February 26, 2008**

Program Owner

Michelle Jones, Field Assistance Analyst

Designated Federal Official

Judi Nicholas

Members Present

Craig Capehart
Dean Conder
Dan Fretheim
Bob Haines
Louise McAulay
Jerry Melchior
David Monnier
Homer Sewell III
Ann Spiotto
Tommy Thompson
Wayne Whitehead, Chair
Regina White

Member Absent

Ed Johnson, Vice-Chair

Guests

Peggy Sue Unander
Christine Kitts

Staff

Dave Coffman, Program Analyst
Marla Ofilas, Secretary

Welcome and Announcements

Judi opened the meeting and Wayne welcomed everyone in attendance. Roll call was taken and a quorum was met.

TAC Visits

To gain a better understanding of the return preparation process, the members were charged with visiting local Taxpayer Assistance Centers (TAC). Each member who visited a TAC discussed their observations with the committee.

Bob found that the TAC he visited has no problem handling their return workload. The existing return preparation process seems to work well. Bob also discovered the employees are very pleased with the Tax Wise software package. They find it very easy to use and updates are readily available.

The staff at the TAC Homer visited was very interested in the committee's project and provided a lot of information about the return preparation process. Homer informed everyone that he was very impressed with the efficiency of the TAC he visited.



Jerry and Dave Monnier observed the same TAC. Jerry explained that one employee screens the customers when they arrive. There are also instances when the manager will assist in the screening process. Jerry observed that this particular TAC is an example of a very busy office. Dave added that there should be a way to confirm (by telephone or other means) an appointment with the taxpayer. The Social Security Administration office already has a confirmation process in place.

ACTION: Dean Conder will research the Social Security Administration's process to confirm a scheduled appointment. Dean will provide his findings during the face-to-face meeting in May.

Judi explained that the IRS has explored a system that would generate a telephone call, attempting calls until the phone line is answered by a person. When the call is answered, it would be routed to an IRS employee. The idea was to conserve on resources. Many of the calls that were being made by IRS employees resulted in unproductive attempts.

Bob noted that "no shows" did not seem to be a problem at the TAC he visited. Jerry said that the same was true for the TAC he visited.

On her visit to a local TAC, Regina found that the IRS is testing a cash conversion kiosk which turns the cash into a money order. Currently, only authorized employees may receive cash from taxpayers. This poses a problem when one of the authorized employees is not in the office. Once the cash is converted to a money order, any TAC employee can accept the payment.

Tommy found the TAC he visited to be a very efficient office. However, one of the main problems seems to be a lack of parking. In addition to Dave's comment on confirming the appointment, Tommy explained that the staff conducts appointment reminder calls and informs taxpayers of the parking situation.

Next Steps

Wayne said the committee is on schedule and looking good. Wayne asked for any additional comments. No additional comments were made.

Program Owner

Michelle felt the committee is progressing in the right direction. Michelle explained that the remaining TAC visits need to be completed so that the data can be consolidated. Wayne agreed.

Closing

Wayne concluded that the face-to-face meeting will be on May 29 through May 31 and all written reports are due May 10. Wayne thanked everyone for participating. Judi closed the meeting.



**Taxpayer Assistance Center (TAC)
Issue Committee Meeting
Teleconference Minutes
January 29, 2008**

Program Owner

Beth Tucker
Michelle Jones, Field Assistance Analyst

Designated Federal Official

Judi Nicholas

Members Present

Dean Conder
Dan Fretheim
Bob Haines
Ed Johnson, Vice-Chair
Louise McAulay
Jerry Melchior
David Monnier
Homer Sewell III
Ann Spiotto
Tommy Thompson
Wayne Whitehead, Chair
Regina White

Member Absent

Craig Capehart

Guests

Deborah Glover
Peggy Sue Unander

Staff

Dave Coffman, Program Analyst

Welcome/Announcements

Wayne welcomed the members. Dave took roll call and a quorum was met.

Review of the Project

Beth reviewed the task that was assigned to the committee at the December meeting in Washington, DC. She asked the committee to provide input on a very high profile issue which impacts the TAC customer – the tax return preparation appointment process. Beth noted some of the problems that currently plague the process and asked the committee to use their collective expertise to take a fresh, non-biased look at this issue and offer suggestions to enhance the process. Beth also mentioned that the current thought on return preparation is that each and every TAC should handle the appointment process consistently. This being said, Beth suggested that the committee look at the process in small, medium and large TACs and see what works best for each office size. Any recommendation from the committee would need to account for the current resource and physical space constraints in each of the TACs.

Wayne recommended analyzing the problem using a three-step process. The first step is to understand the process. The second step is to characterize the process and the third step is to put the data on a fishbone diagram, which will help the committee to see some suggested improvements.



Between now and May, the committee will do a lot of data gathering and a lot of characterizing of what's been observed.

Bob asked if the purpose of the first TAC visit is to simply observe the process. Wayne agreed and said that a later visit could involve an in-depth discussion with the manager and possibly even an employee. Bob asked if two visits are really necessary. Couldn't an interview be completed with the first visit? Wayne agreed and said that the interview could be completed on the first visit. Some members may be well-versed with the TAC operation while others may not. Beth agreed and suggested that the committee play it by ear.

Jerry noted that it's been more difficult to schedule a TAC visit than in the past. Beth replied that if a member is having a problem getting in touch with a TAC manager it may be due to some of the training demands on managers of new employees. If a member continues to have a problem reaching a manager, please contact Michelle and she will get the member in touch with the manager. Judi added that the staff has had much less time to coordinate the visits than in the past. If members continue to experience problems with TAC managers not responding, they should let Dave know so he can work with Michelle on getting a response back to the member.

ACTION: Members having trouble reaching local TAC managers should inform Dave of the problems they're having.

Dan asked if Dave should be contacted to schedule a follow up visit with the manager. Michelle replied that once the territory managers know about the visit, it's okay to discuss a follow-up visit directly with the manager.

Bob asked if data is available for the TAC that he's scheduled to visit. Dave will work with Michelle on getting return preparation data for each TAC being visited. Wayne said that the TAC manager should have that info too. Beth offered to share the distribution of new hires, the staff levels and number of returns prepared at the TACs that are being visited.

ACTION: Michelle will provide Dave with the staff figures and the number of returns that are prepared at the TACs being visited. Dave will share this data with the committee.

TAC Visits

Dave provided an update on the TAC visits. Except for one person, each member has identified a TAC to visit. Dave is in the process of sending out e-mails addressing reimbursement for mileage, contact information for the TAC managers and other odds and ends to ensure a smooth visit. Dave noted that one member has already experienced his first TAC visit. Dave also asked the members to treat the phone number they have for the manager as confidential and use it only for work with this committee.

Next Steps

Judi asked Wayne for his vision on how the TAC experiences will be shared among the committee members. Wayne replied that conference calls in February and March will be good opportunities for members to inform the committee of their observations. The big rollout of information will be at the face-to-face meeting in May, when the fishbone diagram is put together. However, before the face-to-face meeting, there will be two conference calls and some e-mail exchanges characterizing the committee's findings. Wayne will send out a one-page document explaining a process that's commonly used in improvement projects. This document will provide some excellent questions to ask during the TAC visits.

ACTION: Wayne will send the members a document titled, Understand, Characterize, Improve.

ACTION: Members will share information from their visits on the February conference call.



Wayne asked Dean to comment on his recent TAC visit. The visit, which Dean found to be very productive, lasted about an hour. Dean expressed some confusion between the role of the Stakeholders Partnerships Education & Communication (SPEC) office and the role of the TACs. Judi explained that SPEC oversees the Volunteer Income Tax Assistance and Tax Counseling for the Elderly organizations. These organizations serve as volunteer income tax preparers. Beth confirmed that the TACs provide income tax preparation services by IRS employees.

Judi noted that the National Taxpayer Advocate's 2007 Annual Report to Congress addresses several areas of the TAC return preparation process. This would be good to read, not to sway anyone's opinion but to be better informed about the process. Dean also shared some observations on seasonal employees, forms availability in outlying offices, and use of the public incoming phone line.

ACTION: Dave will send the committee the portion of the 2007 Annual Report to Congress that addresses the TAC return preparation process.

Wayne asked Beth if there are any penalties imposed on taxpayers that don't show up for their appointment. Beth replied that there are no penalties imposed for a taxpayer missing an appointment.

Beth spoke of some changes that were made to the return preparation appointment process, based on observations she made in her TAC visits. Beth replied that the committee should also review the new guidance memorandum that was distributed to all TAC employees.

ACTION: Michelle will send Dave a copy of the new guidance memorandum. Dave will distribute the memo to the committee.

Judi mentioned that an Internal Revenue Manual (IRM) excerpt on the return preparation process, dated Nov. 27, 2007, was recently distributed. Michelle noted that a more current manual is being written.

ACTION: Michelle will provide Dave with a more current IRM on the return preparation process. Dave will then distribute it to the committee.

Program Owner Comments:

Beth commented that she's looking forward to this project developing over the next few months.

Member Comments:

Wayne informed members that they can fill out the meeting assessment if they wish. No other comments were made.

Closing:

Judi thanked everyone for a productive call and closed the meeting.