



2009 Meeting Minutes Taxpayer Assistance Centers (TAC) Issue Committee

- December 16, 2009
- November 24, 2009
- October 27, 2009
- September 22, 2009
- August 25, 2009
- July 28, 2009
- June 18-20, 2009
- May 26, 2009
- April 28, 2009
- March 24, 2009
- February 24, 2009

Taxpayer Assistance Centers (TAC) Committee Annual Meeting Minutes December 16 – 17, 2009

Program Owners

- Beth Braddock - Policy Analyst
- Jane Brough - Supervisor

Committee Members Present

- Bohrer, Herbert - Springfield, ID - Member
- Capehart, Craig - Dallas, TX - Member
- Child-Tomie, Audrey - Brick, NJ - Member
- Conder, Dean - Lakewood, CO - Member
- Davis, Patricia - Mitchellville, MD - Member
- Eik, Nancy - Missoula, MT - Member
- Fretheim, Daniel - Decorah, IA - 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 - Vice Chair
- Thompson, Tommy - Southaven, MS - Chair

TAP Staff

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



Opening/Welcome/Pledge of Allegiance/Review Agenda (Thompson)

Quorum met. Introductions of Panel Members and Staff.

The Taxpayer Assistance Center Committee Report on Improving the Payment Process in the TACs 2009 (Thompson)

- **Field Assistance Update on Implementation (Program Owner)**

Tommy Thompson reviewed the TAC Report recommendations. The program owners then provided an update on the implementation. Jane Brough noted the Section Chiefs have the TAC Committee's recommendations. They have been going through a system of flowcharts for the payment process. Currently seven to nine TACs are test sites for the check reader. Field Assistance will form a team early this fiscal year to plan and propose software for 2013, which will allow taxpayers to make an appointment on-line for tax return preparation at a TAC office.

ACTION ITEM: Brough will email the analyst a list of TACs being used as test sites.

Per Roy Block the 2009 TAC Report will be printed and disseminated to all TAP Panel Members.

Staff Roles and Responsibilities (Block)

- **Methods of Communication**
- **Ground Rules and Telephone Etiquette**
- **Minutes/Minutes Approval**
- **Establish Meeting Quorum**
- **Follow-up Surveys**

Ellen Smiley is your immediate analyst. She will be your point of contact.

The main methods of communication are email and telephone. The members will use Smiley's access number for the teleconferences held each month. The dial in information will appear on the agenda which is sent out prior to the teleconference along with other pre-read information for the meeting. The dial in number and access code is the same for every teleconference meeting. Smiley will send the agenda and pre-reads via email as well as post them on TAPSpace. Telephone etiquette guidelines are:

- When using a speaker phone, please use your mute button
- Do not put the call on hold, as the hold music is a disruption for the teleconference call
- Be respectful and let current panel member finish speaking before you start
- Announce your name before you speak to let the others know who is speaking

At each meeting, approval of the minutes for the prior meeting will be obtained. November minutes are approved.

The panel members established Quorum to be 50%.

A meeting survey will be completed at the face to face meeting.

Educate Members on TACs (Program Owner)

Program Owners awarded certificates to last years TAC panel members for appreciation for a successful year.



A power point presentation was shared explaining who Field Assistance is, their Mission Statement, and structure. Key services provided in a TAC were explained, as well as their 2009 accomplishments, technology portfolio, and innovations.

TAC Issue for 2010 (Program Owner)

- **Committee Focus, Goals, Objectives**
- **Working in Subcommittees**

The TAC project for 2010 is to improve the current signage in our TACs. Discussion of the project resulted in requesting a change in the project topic to "Review the current signage in our TACs and improve current communication method in the TACs". Handouts provided were the Taxpayer Advocacy Panel Issue Committee Proposal and IRM Section 21.3.4.3.12 regarding TAC Signage.

ACTION ITEM: Obtain one complete set of signs used in TACs for the face to face meeting.
ACTION ITEM: Provide electronic version of signs to panel members.

Panel Members should visit TACs to view the signs used in TACs. Members can take photos of the signs being used in the TACs; however members need to provide a list of TACs they will visit in order for the program owner to get permission for panel members to take photos if they choose to.

Brough noted that most TACs have television monitors and Field Assistance is open to suggestions for audio.

Block and Thompson discussed may want to have a video. Different videos may be appropriate for large TACs and small TACs.

Ann Spiotto suggested handing a brochure "All about the TACs" to taxpayers as they walk in. Can we get this information to taxpayer's before they even get to the TAC? That is the reason the sign "We Can help you With...." is posted at the first point of contact.

It is also suggested to look at other private industries to see what other organizations do. Herb Bohrer suggested visiting immigration offices and talk to a representative as they have non English speaking customers. Patti ONeill also added the California Department of Motor Vehicles is a site to consider visiting as they deal with non English speaking customers.

Research states audio and visual are the best methods to inform customer vs. reading, per Audrey Child-Tomie. Videos used in TACs could also be put on the IRS website as long as they are 508 compliant.

We may need to consider a multiple approach, as different TACs may need different methods of communication.

Dave Monnier posed the questions "What is the budget for the signs?"

ACTION ITEM: Brough to get the budget for signs to the analyst to be forwarded to the TAC panel members.

Need to be aware of what signs still need to be posted such as "no food or drink".

Brough noted there is no guidance at this point as to what language signs are available, such as a sign in Hmong language, for signs in areas with other minorities.

ACTION ITEM: Brough to find out if TACs currently have signs in a language other than Spanish.



Per Braddock, there are interpreters available at the TACs for the hearing impaired but the customer needs to call in and make an appointment so the interpreter will be available at the appointment time. The TACs have a phone line they take appointments through.

ACTION ITEM: Brough will provide information on how often interpreters have been used in the TACs.

Craig Capehart mentioned that looking at the IRM there are really six signs to seriously consider.

John Leggett stated that the committee needs to put themselves in the position of the taxpayer. When a taxpayer comes into the TAC, they are really not going to care about seeing the signs, as they are there to resolve their issue.

The first step is to visit the TACs and observe what the taxpayer is doing while in the TAC. Are they reading signs or are they on their cell phones? What is their environmental behavior while in the TACs?

As the panel members visit the TACs, think of what messages you would want the taxpayer to know at the point they walk in the door, such as, provide service hours, explain the services provided, prohibition of certain items, etc.

Panel Members should begin to make arrangements to visit TACs.

ACTION ITEM: Smiley will email the process on visiting the TACs to new and existing panel members.

Panel Members will advise Smiley which TACs they plan to visit. Smiley will then notify the program owner, who will alert the TAC managers of the current TAC Committee project. The name and telephone number of the manager will then be provided to the panel member in order to contact the manager and set an appointment to visit the TAC. Each panel member will provide a written report summarizing their visit to the analyst. Panel members will need to track the mileage and parking costs to provide to the Milwaukee office for reimbursement

Spiotto suggested panel members use a collective set of questions to ask while at the TACs. Panel Members should send their questions to Smiley, who will compile those questions for discussion at the January call.

Monnier suggested wearing your name badge and bring your TAP business cards when visiting the TAC, as this could be an outreach opportunity.

Review TAC Issue Committee Annual Report for 2009 TAP Report (Thompson)

This report will be included in the TAP 2009 Annual Report.

Election of Chair and Vice-Chair for 2010 (Thompson)

Elected Chair – Tommy Thompson

Elected Vice Chair – Dean Conder

Calendar: Members to confirm availability for Teleconferences and Face-to-Face Meeting

- **Establish Date and Time of Monthly Teleconferences**



Teleconferences will take place the 4th Tuesday of every month at 1 p.m. CT. The first meeting of 2010 will take place January 26.

- **Establish dates for Face-to-Face meeting**

The dates for the face to face meeting will be June 27 - 29, 2010

The location choices presented for the meeting are: Milwaukee, WI; Indianapolis, IN; St. Louis, MO; Kansas City, KS; Nashville, TN; Atlanta, GA

A cost analysis of travel cost for each city will be completed and the most cost effective location will be chosen for the face to face meeting.

Meeting Adjourned



**Taxpayer Assistance Centers (TAC) Committee
Teleconference Meeting Minutes
Tuesday, November 24, 2009**

Program Owners

- Beth Braddock Program Analyst

Committee Members Present

- Bohrer, Herbert Springfield, ID Member
- Fretheim, Daniel Decorah, IA Member
- Leggett, John Canterbury, NH Member
- McAulay, Louise Florence, SC Member
- Monnier, David Indianapolis, IN Member
- Spiotto, Ann Lincolnwood, IL Vice Chair
- Thompson, Tommy Southaven, MS Chair
- Werner, Mary Jo La Crosse, WI Member

Committee Members Absent

- Conder, Dean Lakewood, CO Member
- O'Neill, Patricia San Jose, CA Member

TAP Staff

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

Guest

- Fett, Bob Burlington, VT Local Taxpayer Advocacy

Welcome/Announcements/Review Agenda (Tommy Thompson)

Roll Call (Lisa Gabriel)

Quorum met

Approval of Minutes (Tommy Thompson)

Minutes Approved

2009 TAC Committee Report on Improving the Payment Process in the TACs

- **Great Job!**
- **Printing**

Tommy Thompson expressed appreciation to all panel members for their hard work on the report. Ellen Smiley advised we won't be able to have the report printed professionally due to the budget, but the Milwaukee staff is willing to print the report for dissemination to all panel members at the TAP



Annual Meeting. Beth Braddock added that a copy of the TAC Report was posted to the Insider, which is the Wage and Investment homepage. The TAC Report will also be posted in Leslye Baronich's weekly message.

Annual Meeting

- **2009 Chair Report**
- **TAC Breakfast/Dinner/Lunch**

If anyone is interested in running for chair or vice chair for any committee, the chair training is Friday, December 18th from 8:00 a.m. till noon.

The TAC Committee will have their Issue Committee dinner on Thursday, December 17th. TAP staff will send an email with a selection of restaurants. Please vote and respond to the staff so reservations can be made.

Thompson indicated the agenda for the Annual Meeting will follow the same format as last year and Smiley will add to it as needed.

Date for January 2010 TAC Call

The January call will take place Tuesday, January 26, 2010 at 1pm CT.

The TAC Committee provided names of several cities for the face-to-face meeting. A cost analysis will be done for each city.

Program Owner Comments

Based on suggestions from the 2009 TAC Committee Report, an action plan was set up to implement the suggestions as well as a timeline.

Member Comments/Closing (Tommy Thompson)

See you all at the Annual Meeting.

Next Meeting: Annual Meeting in Washington, DC, December 14 – 18, 2009



**Taxpayer Assistance Centers (TAC) Committee
Teleconference Minutes
Tuesday, October 27, 2009**

Program Owners

- Braddock, Beth - Policy Analyst

Committee Members Present

- 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

Committee Members Absent

- Dan Fretheim - Decorah, IA - Member
- Werner, Mary Jo - La Crosse, WI - Member

TAP Staff

- Smiley, Ellen - Milwaukee, WI - Program Analyst
- Robb, Patti - Milwaukee, WI - Program Analyst

Welcome/Announcements/review agenda

Tommy Thompson said this is our final review of the Taxpayer Assistance Center report and our final chance to make changes to our report. Our timeline requires it go to the publisher.

Approval of minutes:

The September 22, 2009, minutes were approved by consensus.

Review Draft Report –

Tommy finished the review and asked for comments on acknowledgements. He asked to convey the appreciation to the staff for all their help.

There were several sentences that were re-worked.

Smiley noted she is having trouble with the links in the document. Ann Spiotto and Smiley will review all the links to ensure they work correctly.

The report will be printed through the IRS. There will be a copy for all panel members at the annual meeting – 150 will be printed.

All committee members gave kudos to Ann Spiotto for putting the whole document together.



Project Timeline

The project timeline has been met.

Program Owner Comments

Beth Braddock said the committee has done an outstanding job on this report.

Member Comments / Closing

Do we want to have a committee breakfast, lunch, or dinner? Think about it and we can make a decision during the November conference call.

Once again, Ann Spiotto has done a magnificent job in putting this report together. Thank you!!!

Meeting Adjourned

Next Teleconference Call – Tuesday, November 24, 2009, at 1:00 pm CT



**Taxpayer Assistance Centers (TAC) Committee
Teleconference Meeting Minutes
Tuesday, September 22, 2009**

Committee Members Present

- Bohrer, Herbert - Springfield, ID - Member
- Fretheim, Daniel - Decorah, IA - 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 - Vice Chair
- Thompson, Tommy - Southaven, MS - Chair
- Werner, Mary Jo - La Crosse, WI - Member

Committee Members Absent

- Conder, Dean - Lakewood, CO - Member

TAP Staff

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

Welcome/Announcements/Review Agenda (Tommy Thompson)

Dean Conder is not able to attend this call as he is in a meeting with the Commissioner today. The subcommittee reports have been completed and sent to all for review. October 1, 2009 the final draft of the full report will be completed and forwarded to panel members for review. Recommendations for changes will be discussed on the October 12, 2009, (note: date change) administrative call. The final report will go to print November 1, 2009.

Roll Call (Lisa Gabriel)

Quorum met

Approval of Minutes (Tommy Thompson)

Minutes approved

Review

- **Review Edits**
- **Approve Recommendations**
- **Next Steps / assignments**

If any members have suggestions for additions, deletions, or revision of the report, please send the suggestions to Smiley. Changes will be forwarded as they are received. Ann Spiotto said the recommendations looked great. Tommy Thompson stated we will look at each issue one at a time. Ann Spiotto will incorporate each subcommittee section into a draft report and send it to all panel members by October 1, 2009.



The Committee and Staff briefly discussed the draft TAC report. There were comments and suggestions made regarding the layout, language, and corrections. The report contained the following recommendations:

- Drop Box
- Form 2290, Heavy Highway Vehicle Use Tax Return
ACTION ITEM: Smiley to research to find websites regarding Form 2290
- Form 8109 B, FTD Deposit form – Over The Counter version
- Q-matic
- Multiple online Forms

Project Timeline

- **Upcoming events**

The administrative meeting has been changed from October 16, 2009, to October 12, 2009, at 1pm CST.

Member Comments/Closing (Tommy Thompson)

Meeting Adjourned

Administrative Meeting: Monday, October 12, 2009 - 1:00pm CST

Next Teleconference: Tuesday, October 27, 2009 - 1:00 pm CST



**Taxpayer Assistance Centers (TAC) Committee
Teleconference Meeting Minutes
Tuesday, August 25, 2009**

Program Owners

- Beth Braddock - Policy Analyst

Committee Members Present

- Bohrer, Herbert - Springfield, ID - Member
- Conder, Dean - Lakewood, CO - Member
- Fretheim, Daniel - Decorah, IA - 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 - Vice Chair
- Thompson, Tommy - Southaven, MS - Chair
- Werner, Mary Jo - La Crosse, WI - Member

TAP Staff

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

Guest

- Bob Fett - Local Taxpayer Advocacy

Welcome/Announcements/Review Agenda (Tommy Thompson)

Tommy Thompson just returned from the Joint Committee meeting. He indicated there was 100% participation. Thompson said thank you to the Milwaukee Staff for their support to this Issue Committee and thank you to the program owner Beth Braddock.

Roll Call (Lisa Gabriel)

Quorum Met

Approval of Minutes (Tommy Thompson)

Minutes Approved

Thompson briefly went through the timeline created for the final report and wanted to remind everyone the report goes to the program owner, and the only way the Joint Committee sees it is through the Annual Report. Thompson talked with the chairs of the other issue committees to inquire if there is a formatted report for issue committees to use. Thompson spoke to Mark Paris, the chair of Communications, and he will have his issue committee create a format to be used by all issue committees across the board.



8109 Subcommittee (Dean Conder)

- **Current Activities**
- **Next Actions**

The subcommittee completed their second draft after the last meeting. The Milwaukee staff found information on federal banks that accept 8109B, FTD Deposit Form, with payments. There are two issues Area Committees elevated to the Joint Committee for review regarding the 8109B process. Area 5 elevated one issue, which was introduced by Dan Fretheim. In his proposal, Fretheim suggested being able to print Form 8109B, from a personal computer. Area 1 elevated an issue regarding the availability of the deposit coupons in the Taxpayer Assistance Centers (TAC). The Joint Committee referred these issues to the TAC Committee to include in their recommendation. This subcommittee will incorporate the information from the Area Committees into their report and plan to have it completed by September 1, 2009, but may need an extension to September 4, 2009.

Drop Box/Payment Envelope Subcommittee (Ann Spiotto)

- **Current Activities**
- **Next Actions**

The basic premise of this recommendation is TACs should have Drop Boxes for non- cash payments. The taxpayer can drop off the payments in the Drop Box and the TAC can ship them to the payment processing center. The benefit would be the TAC doesn't have to take time to log payments. The subcommittee feels the TAC should not have the ability to opt out of this process, as the reasons given for not having payment boxes have eroded away. Dave Monnier added that the slot of this box should be a minimum dimension to fit only the required envelope and we should use this opportunity to promote the Electronic Federal Tax Payment System (EFTPS) by having a statement on the box advising you could also make payments using EFTPS. John Leggett suggested having EFTPS literature near the drop box.

Form 2290 and Alternative Proof of Payment Program Subcommittee (David Monnier)

- **Current Activities**
- **Next Actions**

A copy of the draft report was sent to the committee members. Monnier called the Indiana Department of Transportation and was informed they can take the form, but they still have to go to the IRS to make the payment. Roy Block added the two websites for electronically filing Form 2290, Heavy Highway Vehicle Use Tax Return, are relatively new. While the big companies are using this site, the smaller ones are not. The stamped receipt that is produced from the site does not appear to be official. People down the pipeline do not understand the process but they will in time. Bob Fett stated that TAS has privatization with taxation, and questioned if the TAC will accept private sites. Dean Conder read the Treasury Inspector General for Tax Administration (TIGTA) report dated March, 24 2008, on Highway Use. They made some of the same points this committee is recommending. He found it interesting the commissioner of Small Business Self Employment (SBSE) encouraged participation in alternate proof of payment programs. Conder thinks this is something to mention.

On-line/Multiple Forms Subcommittee (Louise McAulay)

- **Current Activities**
- **Next Actions**

The subcommittee is working on their report and plans to have it completed by September 1, 2009.



Q-Matic and Wait Time Subcommittee (Patti O'Neill)

- **Current Activities**
- **Next Actions**

The subcommittee has a plan in place and will make the September 1, 2009 deadline.

Program Owner Comments (Beth Braddock)

Beth Braddock is looking forward to reading the proposals.

Office Updates (Roy Block)

Last year TAC had two face to face meetings but this year we are only having one due to the budget. Recently, Patti Robb was selected for the Program Analyst position and is responsible for Area 5 and the Communications Committee. The office will be announcing the Junior Analyst position in about 30 days. The Joint Committee had their face to face meeting August 20 through 22 and is now finishing the different reports and are really proud of the work the TAC Committee has done.

Member Comments/Closing (Tommy Thompson)

Thompson asked that the subcommittees to send their reports to Ellen Smiley by September 1, 2009, but absolutely no later than September 4, 2009. Once the reports are disseminated, if any panel members have any changes or comments on the reports, please respond to Smiley before September 22, 2009.

The Joint Committee was asked to have TAP members participate in a survey Wage and Investment was conducting regarding TAC's. It was announced at the Joint Committee Meeting by Shawn Collins that TAP will not participate in this survey.

Next Teleconference is Tuesday, September 22, 2009 at 1:00 pm CST



**Taxpayer Assistance Centers (TAC) Committee
Teleconference Meeting Minutes
Tuesday, July 28, 2009**

Committee Members Present

- Bohrer, Herbert - Springfield, ID - Member
- Conder, Dean - Lakewood, CO - Member
- Fretheim, Daniel - Decorah, IA - Member
- Leggett, John - Canterbury, NH - Member
- McAulay, Louise - Florence, SC - Member
- Monnier, David - Indianapolis, IN - Member
- Spiotto, Ann - Lincolnwood, IL - Vice Chair
- Thompson, Tommy - Southaven, MS - Chair
- Werner, Mary Jo - La Crosse, WI - Member

Committee Members Absent

- O'Neill, Patricia - San Jose, CA - Member

TAP Staff

- Block, Roy - Milwaukee, WI - Manager
- Robb, Patti - Milwaukee, WI - Program Analyst
- Gabriel, Lisa - Milwaukee, WI - Secretary

Guest

- Bob Fett - Local Taxpayer Advocacy
- Randee Cook - TIGTA

Roll Call (Lisa Gabriel)

Quorum Met

Approval of Minutes (Tommy Thompson)

Minutes approved

8109 Subcommittee (Dean Conder)

- **Current Activities**
- **Next Actions**

Dean Conder stated the subcommittee met recently. Their first draft is completed and hoping to have a second draft out soon to send to the committee for review. While the subcommittee was working, we identified more research that will need to be accomplished. The subcommittee feels that Internal Revenue Service (IRS) should work to adopt Form 8109-B, *FTD Deposit Form*, for all taxpayers. We normally provide a recommendation and then rationale, and have included a category for facts and assumptions in the report. We are thinking of moving information of rationale and display it as a separate subsection showing bullet points.



Drop Box/Payment Envelope Subcommittee (Ann Spiotto)

- **Current Activities**
- **Next Actions**

The subcommittee will be having a conference call tomorrow. We have some internal works to accomplish and will have a report out for the next conference call.

Form 2290 and Alternative Proof of Payment Program Subcommittee (David Monnier)

- **Current Activities**
- **Next Actions**

David Monnier indicated that there is a website where truckers can go to get a copy of their Form 2290, *Heavy Highway Vehicle Use Tax Return*, printed with a stamp on it as proof of payment. Roy Block said the site allows for two vendors to be processing agents for filing the form. Truckers can go on a website and for as little as \$29 they can get the stamped receipt within an hour. The IRS needs to promote this website. Dave Monnier added we can still recommend to make this option available at a bank. Tommy Thompson said when he saw a truck driver, he asked them about this process. Many responded they are lazy and simply wait until last minute. He then asked if they would prefer a drop box and they indicated that really wouldn't be all that helpful to them. Finally he asked if they would pay at a bank and some did respond that would be a good option. Block said the \$29 charged by the website is an additional fee and if the drivers go to the Taxpayer Assistance Center (TAC) the process is done for free. The subcommittee will take this website into consideration and discuss this further.

On-line/Multiple Forms Subcommittee (Louise McAulay)

- **Current Activities**
- **Next Actions**

The Subcommittee had one conference call and has requested more information from Smiley. She responded immediately to the request. They have what they need and will get a draft out by next meeting.

Q-Matic and Wait Time Subcommittee (Patti O'Neill)

- **Current Activities**
- **Next Actions**

John Leggett was wondering why IRS could not get summary of data on the Q-matic systems used in the TACs. Randee Cook mentioned that this was also a concern from Treasury Inspector General for Tax Administration (TIGTA).

Survey Results from Face to Face Meeting (Ellen Smiley)

Patti Robb stated that Smiley will make sure that in the future that flip charts are available at next face to face meeting. A panel member asked about a list of acronyms and was told to look in Chapter 9 in the TAP member handbook. There is a list of commonly used acronyms to refer to. **ACTION ITEM: Tommy Thompson to send Lisa Gabriel a list of acronyms to add to the meeting minutes.**



Office Updates (Roy Block)

Block noted that he was very pleased with the survey. The office has prepared a tentative coversheet for the TAC Report and a sample was emailed out to the panel members to review.

Patti Robb was promoted to the Area 5 and Communications Committee analyst in the Milwaukee office. This opens up the junior analyst position.

Miscellaneous (All)

Conder brought up the issue of which banks will accept payments under the current 8109 process; there is some conflict on what is a federal depository bank and which banks qualify as such. We need the definition of federal depository and which banks qualify.

ACTION ITEM: Staff to help find information regarding federal depositories and which banks qualify so that they can be cited hopefully as Federally Chartered Banks.

Monnier had visited with bank managers of two different banks. Both managers said they were aware of 8109 process, were interested in it, and felt this was a positive thing.

Member Comments/Closing (Tommy Thompson)

Thompson noted that a timeline was included in the pre-reads for this meeting. September is the deadline and there are calls scheduled for October 16th and 27th. If there is a way a subcommittee can describe the issue in recommendation format, please do so.

Next Teleconference is Tuesday, August 25, 2009 at 1:00 pm CST



**Taxpayer Assistance Centers (TAC) Committee
Face to Face Meeting Minutes
Thursday, June 18 - 20, 2009**

Program Owners

- Beth Braddock - Policy Analyst
- Jane Brough - Supervisory Financial Management Specialist

Committee Members Present

- Bohrer, Herbert - Springfield, ID - Member
- Conder, Dean - Lakewood, CO - Member
- Fretheim, Daniel - Decorah, IA - Member
- Leggett, John - Canterbury, NH - Member
- McAulay, Louise - Florence, SC - Member
- Monnier, David - Indianapolis, IN - Member
- O'Neill, Patricia - San Jose, CA - Member
- Thompson, Tommy - Southaven, MS - Chair
- Werner, Mary Jo - La Crosse, WI - Member

Committee Members Absent

- Spiotto, Ann - Lincolnwood, IL - Vice Chair

TAP Staff

- Block, Roy - Milwaukee, WI - Manager
- Smiley, Ellen - Milwaukee, WI - Program Analyst
- Gabriel, Lisa - Milwaukee, WI - Secretary

Opening/Welcome/ Review Agenda (Tommy Thompson)

Louise McAulay asked why the front line managers did not see the Taxpayer Assistance Center (TAC) 2008 Report. Jane Brough and Beth Braddock indicated they will follow up and ensure the report is distributed. A copy of the November 2008 "Report of the Taxpayer Assistance Center Committee on the Tax Return Preparation Process in the TAC" was provided to the members for review.

Meeting Minutes Approval

Minutes Approved

**Program Owner Opening Comments / Review of Assignment
(Jane Brough and Beth Braddock)**

Brough wanted to clarify for the Committee the TAC is not there to just collect payments. The focus is toward the individual and not the practitioner or the small business. TACs take a lot of payments, which is 45 % of the employee's workload.

The TACs migrate to improved processes. There are many of these offices and many ways to do things. It takes time and effort to get messages through the ranks and the change doesn't happen all at once. For example, some TACs miss the drop box and would like to see it back and some would not. Another issue is the use of the Form 809, Receipt for Payment of Taxes when cash is received. TACs are working on automating the Form 809, but it is on hold due to lack of funding.



The TACs use to have a teller unit located in the field offices and they had specific daily reports of cash. These teller units handled cash and checks all day long, and then we eliminated the teller unit and started taking payments within the TAC. We do not have cashier units and a paper trail is used to track payments.

Brough explained TAC's are looking at two different projects to help streamline the payment process: the automated Form 795, Daily Report of Collection Activity and paper check conversion. Currently the employees use four different processes, including courier

Roy Block advised that he and his staff went to the Wisconsin Department of Revenue (WDOR) and asked how they processed payments. WDOR uses Check 21. Check 21 is a check reader that scans the check and electronically transfers the money. TAC management is in the process of implementing this system, but there is concern with the check reader when there are several tax years involved. Block also had a suggestion about the Post Office receiving IRS payments, but after discussing the Post Office process, they don't have a better process.

Brough advised they have looked at the National Park Service as they eliminated their drop boxes. Now they collect the money send it to the Federal Reserve.

There is not a way to combine all the Q-matic systems to gather information from the TACs as a whole. Each TAC is reviewed individually to get their information from their specific Q-matic system.

Dean Conder brought up payment from truck drivers using the Form 2290, Heavy Highway Vehicle Use Tax Return. Brough stated that they should not be even making these payments in the TAC as there is a way to get that Schedule 1, Schedule of Heavy Highway Vehicles stamped without the taxpayer coming to the TAC. A discussion took place about how the taxpayer will hold onto their money until the very last minute to make a payment.

Field Assistance TAC Report (Jane Brough)

The Field Assistance TAC Report was handed out. Brough went through the handout and began to bring focus to the customer satisfaction survey. The surveys are weighted information that is put together from Pacific Consulting Group. The score is made up on these group of questions listed in the report which goes to the Commissioner and to Congress. Brough went through her presentation explaining the information in the Field Assistance TAC Report. Several panel members made suggestions on other data to gather.

ACTION ITEM: Jane Brough will provide "CPE DVD" to John Leggett.

ACTION ITEM: Beth Braddock will provide the number of greeters (IAR's) in the TACs to Ellen Smiley.

ACTION ITEM: Beth Braddock will provide data on Cash Receipts collected by the courier service.

Introduce Diagram – Tools for Cause and Effect (Dean Conder)

The two handouts that were passed out to be used as tools are the Fishbone Diagram and the Pareto Chart.

Each TAC issue has its separate problem and each issue has its separate solution. The panel reviewed the use of the Pareto Chart. On page 2 of the Pareto Chart handout it shows examples on how to address issues and provide solutions.

Consensus to work the following issues:

Issue: 8109B

Issue: Drop Box, Use of preprinted envelope, and Information required to make a payment

Issue: Form 2290 Payment



Issue: On line/Multiple and different forms used in the payment process

Issue: Q-matic and wait time

ISSUE: 8109B – IRS should adapt an 8109B process for all Taxpayers

Pros

Improve customer service by:

- *reducing wait time
- *reducing travel time to the TAC

Improve taxpayer access to payment locations:

- *providing more locations
- *hours of access to include Saturday service,
- *receipt to the taxpayer
- *eliminate parking costs
- *improve TAC service to other customers
- *Reduce TAC costs (for all taxpayers)

Improve TAC Operations by:

- *minimize administration efforts associated with payment processing
- *improve staff utilization
- payment process consumes 161,445 work hours
- *normalize work load time overtime
- *eventually eliminate courier expense
- float expense at bank is minimal
- *management can focus resources on tax issues versus administration process
- emerging features
- American Recovery and Reinvestment Act of 2009 (ARRA)
- new tax law issues
- improve security

Con

- *Current Availability of 8109 to individual taxpayer
- *Special inks used that hinder on-line availability of the form
- *Cost of process revision and implementation and education
- *Not all banks accept the 8109B Form
- *Lack of completeness or accuracy review of 8109B provided to bank may result in additional work at receiving campus

SUBCOMMITTEE: Dean Conder (Chair), Herb Bohrer, Mary Jo Werner

ACTION ITEM: Analyst to add current Form 8109 process through banks to this write up.

ACTION ITEM: Analyst to gather a list of banks that accept the payment

ACTION ITEM: Jane Brough and Beth Braddock will research IRM section to see what is stated for posting payments procedures and email information to Ellen Smiley who will in return email the committee.

ISSUE: Drop Box, Use of Payment Envelope, and Information that is required to make a payment – The IRS should implement a process giving the taxpayer an option for using payment drop boxes in TACs. (This is for non cash payments by use of pre-printed envelope)



Pros

- *Time Savings for Taxpayer
- *Reducing wait times for all customers
- *Improve TAC services for other customers

Cons

- *Does not solve issue of providing customer receipt
- *Internal Control procedures may not allow forwarding of unopened envelopes

Additional Comments:

- *Drop boxes in public areas for small TACs where there is no greeter
- *Preprinted payment envelope is for non cash payments only
- *Taxpayer Payment Envelope Title should read "Non cash posting payment envelope"
- *IRM indicates use of Form 795

SUBCOMMITTEE: Ann Spiotto (Chair), John Leggett, Tommy Thompson

Issue: Form 2290, Heavy Highway Vehicle Use Tax Return Payment – IRS should partner with the Department of Transportation to mandate individual states to be the collector of Form 2290 payments (multiple states currently use this process).

Pros

- *reduce repeat traffic into TAC
- *reduce wait time
- *reduce staff time

Additional Comments:

- *significant use of payment process
- *July is a heavy period of this process
- *Change transportation regulations to require proof of payment versus having payment stamped
- *Difficulty in interface with Department of Transportation regulations and State Department of Motor Vehicle offices on accepting change
- *Discussion to follow the model used by Georgia

SUBCOMMITTEE: David Monnier (Chair), Dan Fretheim, Herb Bohrer

ACTION ITEM: The analyst will research how many states currently accept Form 2290 payments.

ACTION ITEM: The analyst will provide a copy of the transportation regulation to the panel members

Issue: On line/Multiple and different forms used in the payment process. IRS should conduct an analysis of the posting and processing of payments with the objective of reducing the number of forms required.

- * Check 21 process provides receipt
- * Modernization & Information Technology Services (MITS) should take action to automate forms related to receipt and processing.
- *Form 809 automated receipt for manual checks and cash
- *Automated Form 809 to populate the Form 795 and 3210

Recommendation: IRS should continue to develop and implement automated processes for real time payment process including the capability of providing a receipt for every payment. The Subcommittee will work on the Automated Process Narrative.



SUBCOMMITTEE: Louise McAulay (Chair), Dan Fretheim, Patti O'Neill

ACTION ITEM: The analyst will research background, such as IRM and regulations for the requirement and purpose or reasoning behind each form of the payment process.

Brough added information on the background for why forms are used. She also advised August 5, 2009 is the start of the pilot program for the check reader. When a test run was done, 50% of the checks were not scanning. There are three major concerns for this process: 1) the check may not be readable, 2) there may be multiple payments/checks from one taxpayer, 3) there may be multiple year payments. The reader currently does not provide a receipt and we are asking that this unit provide a receipt and reports.

The automated 795 is being designed and piloting for this will begin in December.

Issue: Q-matic and Wait Times – The IRS should continue to refine its use of the Q-matic system to educate customers in its use and for the development of performance information

Pros

- improve information signs for customers
- elimination of use of multiple visit purpose codes

SUBCOMMITTEE: Patti O'Neill (Chair), Louise McAulay, Mary Jo Werner

TAC REPORT TIMELINE

July and August 2009 the subcommittees will set up time to discuss, work, and complete their issue.

September 1, 2009 have issues and recommendations with rational sections completed and submit your section for all to review. Subcommittee chairs please email these completed write ups to Smiley, who will distribute to the committee for review.

September 22, 2009 monthly TAC call to discuss any changes to the issue sections.

October 1, 2009 the final draft of the complete report due for all to review.

Friday, October 16, 2009 1:00 pm CT, teleconference to discuss any changes to the final report.

October 27, 2009 monthly TAC call for approval of the final report.

November 1, 2009 final report to be printed.

Next Steps

- **Writing Report – Report Format**
- **Tasks**
- **Deadline**
- **Review / Update**

Committee Members reviewed and discussed the handout, "Proposed Format for TAC Report". It was decided that Thompson and Block will work on the cover page. Ann Spiotto will work on the Research and Analysis Section. Subcommittees will work on the Conclusions and Recommendations.



A copy of the writing guideline was handed out to each panel member to use as a reference for writing up their issues for their subcommittee.

ACTION ITEM: Lisa Gabriel will email the subcommittee chairs a reminder to go through Smiley to get any additional information they may need and she will request the information from Braddock or Brough.

Program Owner Comments (Leslye Baronich)

Leslye stated that she was excited to receive the TAC Observation 2009 document that contained all the TAC visits. In the past ten months Leslye has been to a total of 20 TACs and would like to visit more, but is very busy in her office. She can see that the TAC Committee came up with some great recommendations and she will do what she can to make them happen. We all know change doesn't happen quickly and it will take time.

Conder questioned the way taxpayers get into the IRS buildings. For example, in Seattle they have airport screening devices, but some TACs don't have that. There is a need for consistency and a concern to have a set policy for security. Leslye responded that this is a huge issue for TAC. She feels all TACs need to have at a minimum one guard, but not all TACs need to have high security as the levels are different, but risks are the same. We really would like some consistent process, where the taxpayer goes through some security process when visiting the TAC.

Werner stated that there are a lot of TACs near post offices where we can share one guard. The Commissioner of Wage and Investment is looking at the guards we have at campuses, where there are only employees, and looking to reallocate.

Leslye added that this past filing season TIGTA did 59 inspections and security was one of their issues. They said you do not have guards at every office. So it may come down from Commissioner Doug Shulman that we need to do that. There are approximately 1,400 Social Security Offices and each one has a guard. If they have funding, then IRS should too.

Leslye responded that space and logistics is another issue with their security and are working on layouts for more privacy and to make it easier for the taxpayer to get in.

Leslye continued to say that quality numbers are up. We have a national goal and we are above that goal. The goal was 84%, meaning each customer contact was handled correctly, and we are at 86%. The goal will be increased for next year.

Leslye noted that Commissioner Shulman is very concerned about the taxpayer experience and is focused in making the process easier for them. We are trying to be one IRS again.

Meeting Assessment / Closing (Tommy Thompson)

Meeting assessment survey handed out. Members filled it out surveys and returned to Smiley.

ACTION ITEM: Smiley will compile the results and email the panel members.

Meeting Adjourned



**Taxpayer Assistance Centers (TAC) Committee
Teleconference Meeting Minutes
Tuesday, May 26, 2009**

Program Owners

- Beth Braddock Oklahoma City, OK Program Analyst
- Virginia Miller Richmond, VA Program Analyst

Committee Members Present

- Conder, Dean Lakewood, CO Member
- Fretheim, Daniel Decorah, IA Member
- Leggett, John Canterbury, NH Member
- Monnier, David Indianapolis, IN Member
- O'Neill, Patricia San Jose, CA Member
- Spiotto, Ann Lincolnwood, IL Vice Chair
- Thompson, Tommy Southaven, MS Chair
- Werner, Mary Jo La Crosse, WI Member

Committee Members Absent

- Bohrer, Herbert Springfield, ID Member
- McAulay, Louise Florence, SC Member

TAP Staff

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

Guest

- Linda Baker Kansas City, MO Systemic Analyst
- Bob Fett Burlington, VT Local Taxpayer Advocacy

**Welcome/Announcements/Review Agenda (Tommy Thompson)
Roll Call (Lisa Gabriel)**

Approval of Minutes (Ann)

Approved

Review of the Project

- **Observation Review (Dan Fretheim and Tommy Thompson)**

Dan Fretheim said his experience at the Taxpayer Assistance Center (TAC) is similar to everyone else's based on their reports. He visited the TAC in Des Moines, IA and noted that it was very accessible. He was there for an hour and half and only one taxpayer came through. At the time of the visit there



were six employees present, one was seasonal, and one soon to be retired and both of these employees handle the Form 809, *Receipt for Payment of Taxes, Cash Book*. The manager stated she will train one more person to handle the 809 Book. The problems with having three employees handling the 809 Book is it takes them away from doing other task such as adjustments. Fretheim added that the employees do give a receipt.

When the TAC employees do a conversion from cash to money order they go to the credit union next door. The down fall is the employees have to front the money for the conversion and then send a reimbursement form to the IRS. This manager didn't think a drop box would be a good idea and thinks it would be used as a garbage can. Another concern is that taxpayers may drop a check in and it would take more man hours to figure out where the check needed to be applied.

The manager's suggestion was to put the 809 Book on the computer and other receipt books on line instead of doing it by hand. She also mentioned the electric check processing and felt we need to try to make the TACs as paperless as possible.

During filing season a taxpayer may wait up to 30 minutes in line. We also may get 12 to 15 payments per day. In July and August there are a lot of payments with Form 2290, *Heavy Highway Vehicle Use Tax Return*, and may be anywhere from 50 to 75 payments a day.

John Leggett said the truckers always seem to be an issue.

Beth Braddock added that electronic filing is required for each return reporting 25 or more vehicles that the taxpayer files during the tax period.

Tommy Thompson stated he spoke to a TAC manager who is responsible for four different TACs. Two are located in Tennessee, one in Arkansas, and one in Mississippi. Each TAC is a different size.

All the TACs that this manager knew about stated that they have safes to lock up money received after the courier has left for the day, and they had no problems before the courier service. Braddock confirmed that all TACs do have safes. A suggestion that came from this manager was to have a separate teller or window marked for cash payments only. The taxpayers in this TAC were there making payments and none were there very long. Some of the taxpayers were truckers making their payments, however most truckers will wait until the deadline to come in to make their payment and nothing will change that.

This TAC receives small and large payments and has no problem taking these payments to a bank and getting them converted. A downside to the courier service is that three of her employees have to handle the money before giving it to the courier which takes these employees away from other responsibilities. This manager is also not able to control her Q-matic process.

Ann Spiotto asked if there was a subcommittee looking at the courier service. Thompson asked if Braddock could find out if this is something that will be looked into. Braddock responded that the courier service is a new system, and put in place for safety reasons. She agreed it can be labor intensive as it takes two or three employees, but this is because of internal controls. She added she is not aware of anyone looking into it. Thompson wants to keep this on the table as a recommendation.

ACTION ITEM: Ellen Smiley to email all panel members the seven issues the TAC is to work on.

Ellen Smiley said she will have all the reviews in a binder for each committee member at the face-to-face meeting in Denver.

Patti O'Neill will be doing her TAC visits this week.



- **Identify Common Observations and Concerns (Tommy Thompson)**

Next Steps (Tommy Thompson)

- **Observation review for May**

Program Owner Comments (Beth Braddock)

The manager Fretheim talked to made comments about computerizing transactions and actually many of these things are in the works. We have automated some of the internal forms and are working on a project for electronic check processing, but the bandwidth is an the issue. It is close to being a reality. A good contact on this issue is Ginny Miller.

Office Updates (Roy Block)

We have identified a few things for TAC that are not included in our report this year. There are things that we just need to raise in the report as we look at processes that TAC goes through and the employees involved need to look at other avenues to receive payments.

We are currently preparing for the Area 4 face-to-face meeting.

Smiley sent an email with the Government Accountability Office (GAO) standards for internal control, which is what the IRS uses as the basis for tracking payments. These are not requirements, just guidelines.

If you did not forward your mileage for the TAC visits to Lisa Gabriel, please email them for processing.

Member Comments/Closing (Tommy Thompson)

Thompson asked Bob Fett if he remembers any problems with the payment process. Fett said there were no problems in their TAC but has heard that banks would not accept deposit coupons for taxpayers who were from out of town. Thompson wondered if there is a way to track issues raised about payment process to the Local Taxpayer Advocates (LTA). Fett stated that there is a code on the Taxpayer Advocate Management Information System (TAMIS).

Thompson asked if Fett could identify some major issues. Fett responded there is a breakdown for payments in TAMIS. There is also a category for misdirected payments. However, the user needs to go into each code to actually get the history of the issue.

Linda Baker added Systemic Advocacy Management System (SAMS) has a section on payment issues.

Mary Jo Werner noted if you don't pay using Electronic Federal Tax Payment System (EFTPS) you end up making a payment by mail and there is a penalty for that. It takes the IRS a few months before they write back saying you did not make your payment through EFTPS and here is your penalty.

Werner added when you are assigned an Employer Identification Number (EIN) and make a payment at the bank with a Form 8109-B, *FTD Deposit Form*, everything is fine with the bank, but then you get a letter from the IRS that they have not received the payment.

Smiley chimed in and suggested to Werner to bring this up at the next Area 4 Committee meeting.

Fett suggested referring this to SAMS.

Meeting Adjourned



Next Meeting is the Face-to-Face June 18 – 20, at the Warwick Hotel in Denver, CO



**Taxpayer Assistance Centers (TAC) Committee
Teleconference Meeting Minutes
Tuesday, April 28, 2009**

Program Owners

- Beth Braddock - Oklahoma City, Ok - Policy Analyst
- Marilyn Jones - Atlanta, GA - Program Analyst
- Virginia Miller - Richmond, VA - Program Analyst

Committee Members Present

- Bohrer, Herbert - Springfield, ID - Member
- Conder, Dean - Lakewood, CO - Member
- Fretheim, Daniel - Decorah, IA - 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 - Vice Chair
- Thompson, Tommy - Southaven, MS - Chair

Committee Members Absent

- Werner, Mary Jo - La Crosse, WI - Member

TAP Staff

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

Guest

- Bob Fett - Burlington, VT - Local Taxpayer Advocate

Welcome/Announcements/Review Agenda (Tommy Thompson)

Roll Call (Lisa Gabriel)

Quorum met

Approval of Minutes (Tommy Thompson)

March 24, 2009, minutes were approved.

In December during the annual meeting we received a handout outlining areas for us to focus on in the Taxpayer Assistant Centers (TAC). Those areas are:

- Analyze recommendations to improve the payment process
- Analyze the amount of time a taxpayer spends waiting to be served for their purpose for visiting the TAC, such as dropping off a payment.



- Provide a recommendation for an alternate way of providing official receipts.
- Determine methods in using courier services
- View the current Q-matic system
- Analyze the 809 payment booklet process.

Please think of where we can make recommendations.

Review of the Project

- **Observation Review (Ann Spiotto and Dean Conder)**

Ann Spiotto was impressed with both centers she visited and noted they were like night and day from each other. She got most of her information from the TAC visit in Chicago. Ellen Smiley and Patti Robb joined Spiotto on her Chicago TAC visit.

The Chicago TAC, which is located on the 24th floor had approximately 20 employees and handled lots of people. The first idea the Chicago TAC manager came up with is to provide a drop box. The manager didn't remember the drop box being removed due to a security issue, but that it was removed due to accountability of the payments.

The manager felt her staff would be more comfortable and secure taking payments out of the drop box instead of taking payments from customers. She also thought that it should be up to the discretion of the manager of any particular TAC to have a drop box or not.

The Schiller Park TAC manager had adverse reaction, noting that the drop box was removed for security reasons and feels her staff would feel unsafe with a drop box with the concern of such threats as Anthrax.

In the Chicago TAC all payments are mailed to the Payment Processing Center. The employees have the cash converted into checks and mail them. There is no courier service in Chicago. It appears to be labor intensive, as well as paper intensive to send out these payments. The employee has to track what goes into the envelope and track the shipment of the envelope until the check is received in the Payment Processing Center.

In the last two years using this process there has only been one envelope missing and it was actually sitting at the IRS Payment Processing Center. There have been a number of instances where several processes were used to track sending payments and they didn't work. When a UPS package is mailed to the IRS processing center, they are supposed to have acknowledgement of the receipt. It appears to be a lot of work to make sure envelopes don't get lost.

The process from converting cash to check required an employee to go to the Federal Credit Union which is in the same building. Arrangements have been made with the Federal Credit Union to make this cost effective for the Chicago TAC. One of the program analysts responded that if there is a post office or Federal Credit Union in the same building as the TAC they do not require courier service. Only offices that do not have a postal service or Federal Credit Union in the same building use courier service. Internal Revenue Service (IRS) uses UPS for sending documents that require tracking. When a Form 3210, Document Transmittal, is used the receiver has ten days to send out the acknowledgement. The reason IRS uses UPS is that we have 24 hours to get payments to the Payment Processing Center. Tommy Thompson suggested discussing this issue further at the face-to-face meeting.



Spiotto also mentioned the use of electronic payment by using a check reader. In the Chicago TAC most payments were installment payments. Spiotto indicated that it takes a lot of energy to walk into the Chicago TAC, from driving into Chicago, parking, going through security, going to the 24th floor and then waiting at the TAC. Some of the payments are small dollars and it doesn't make sense to go through all that just to make a small payment. One suggestion is showing the taxpayer how to enroll into the Electronic Federal Tax Payment System (EFTPS). It may be worth taking the ten minutes to show them how to use it. Some TACs have televisions set up and perhaps they could run the DVD on EFTPS to get the information out to those waiting. There could also be a computer on site for facilitated self-help.

In the Chicago TAC around April 15 there are people coming in with boxes of payments and forms such as the 1040, 1040ES, etc. It is not understandable as to why these boxes are brought in and why there isn't more efficient way of doing this. Why are payments being submitted in this manner? The TAC Manager didn't know why this was happening, but noted they always accept the boxes. One suggestion as to why this occurs is that the person bringing in the boxes may be a tax preparer and has clients that are coming in last minute.

Bob Fett stated with having worked in TAC before, many times those boxes were filled with funeral trust and extensions. This may also save the tax preparers money by dropping the forms off at a TAC. Patricia O'Neill stated her office used to have someone hand carry all of the extensions to the IRS, but have changed their procedures and now do it by certified mail. This process is actually cost effective because you don't have to pay someone to stand in line.

Thompson noted that it would seem to be a bigger security threat having large boxes coming in compared to a drop box.

The Schiller Park TAC manager suggested the payment process should have an agreement with one major bank to take payments. Someone like the Bank of America will accept payments for property taxes for Cook County. Another suggestion was to provide broader education on EFTPS.

Fett added that a taxpayer can make estimated payments with EFTPS and can also pay by credit card, though the taxpayer will absorb the credit card fee.

Dean Conder said those making payments at a TAC are looking for a receipt.

The Schiller Park TAC uses a courier service and the manager has asked the courier service to try to come later in the day as they get payments throughout the day. They have no means of converting cash payments to checks and only one person among the staff is qualified to take cash payments.

Conder met with the TAC manager in the downtown Denver office and his idea for improving processes in their TAC is to allow the manager to set the Q-matic set up. Denver uses a courier system and it works well for them. The Denver office receives 20 to 30 cash payments a day. The biggest cash payers are truck drivers as they need to make their tax payment in order to keep their license. There are four out of eight employees that can actually use the 809 payment book. The majority of the taxpayers coming in were there to make a payment on their payment plan. On the subject of the drop box, if one has to go through security on the ground floor with a box why not have a drop box there?

Conder noted that for taxpayers that are on a payment plan the concern is security and assuredness. This is the biggest reason they come in person to make a cash payment. Payment plans are negotiated outside the TAC. Fett added that installment agreements can be made by phone and there is also a form that can be filled out. Taxpayers get a statement each month regarding their installment agreement. The statement has a slip that can be removed that provides the information where a payment can be mailed, but some still only know how to pay by cash and do not have bank accounts. That is why payments are made in a TAC.



Beth Braddock stated that Denver is the only TAC that has the situation where the manager cannot change the Q-matic choices. Conder noted that the manager can view the Q-matic choices and if there seems to be a larger number of customers that need to make payments the manager can pull an employee from another area to assist.

John Leggett said it would be nice to see the results from all TACs on the waiting times the Q-matic records provide.

Wage and Investment will be conducting a customer survey in 2010 for issues such as wait time. This has also been mentioned in the Joint Committee meetings. Up next month for TAC visit reports are Patricia O'Neill, Dan Fretheim, and Tommy Thompson.

- **Identify Common Observations and Concerns (Tommy Thompson)**

Several of you took notice of wait times. There seems to be a wide range of wait times. One taxpayer waited 5 minutes and another 30 minutes.

Program Owner Comments (Beth Braddock)

- **Cost for Courier Service**

The cost for courier service for one year at all 165 TACs is \$1,174,271. These courier services are used everyday. Leggett asked why use a courier everyday? Why not use a courier when there is a real need for it? Thompson said this can be discussed at our face to face in Denver.

Braddock added that everyone has to remember that there are internal controls that are standard for government service.

Office Updates (Roy Block)

- **Face-to-Face Meeting**

The Warwick Hotel has been secured for our face-to-face meeting taking place June 18- 20, 2009, in Denver, CO. The staff has been working on a deposit coupon, and we researched the law pertaining to the form. We think we will be able to present a process and take the cash payment out of the TACs. This information will be presented at the face to face meeting

This week we are getting ready for our Area 5 face to face meeting. The Milwaukee staff is taking a field trip to the Wisconsin Department of Revenue to review their paperless process for payments.

Meeting Adjourned

Next Teleconference is Tuesday, May 26, 2009 at 1:00 pm CST



**Taxpayer Assistance Centers (TAC) Committee
Teleconference Meeting Minutes
Wednesday, March 24, 2009**

Program Owners

- Beth Braddock - Oklahoma City, OK - Program Analyst
- Marilyn Jones - Atlanta, GA - Remittance Analyst

Committee Members Present

- Bohrer, Herbert - Springfield, ID - Member
- Fretheim, Daniel - Decorah, IA - 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

Committee Members Absent

- Conder, Dean - Lakewood, CO - Member
- Leggett, John - Canterbury, NH - Member

TAP Staff

- Block, Roy - Milwaukee, WI - Manager
- Smiley, Ellen - Milwaukee, WI Program - Analyst
- Gabriel, Lisa - Milwaukee, WI - Secretary

Guests

- Linda Baker - Kansas City, MO - Systemic Advocacy
- Bob Fett - Burlington, VT - Local Taxpayer Advocate

Roll Call (Lisa Gabriel)

Quorum met

Approval of Minutes (Tommy Thompson)

Tommy Thompson questioned page two of the February minutes when Mary Jo Werner discussed receiving cash payments. Marilyn Jones indicated there is a need for internal control regarding cash payments. There must be at least three or more employees in the Taxpayer Assistance Center (TAC) in order to have a Form 809 Receipt Book to receive cash payments. Ellen Smiley stated only one person in the TAC has the Book. Jones noted in a TAC that only has one employee, that employee needs to have command codes to do adjustment type work and not be restricted by having an 809 Book. The restrictions are in the Internal Revenue Manual. Thompson would like to discuss this at the face-to-face meeting in June as we may be able to make recommendations to this problem.



Thompson also noted there are group managers that manage more than one TAC and can be located several hours away. He questioned, "Who is in charge when a manager is not there?" Jones stated the TAC manual gives employees their authority and states when they need approval from the manager. The group manager's computer has all their employees computers tied into it so it's easy to track and approve.

Thompson also asked about TACs having a greeter. Herb Bohrer stated in Idaho the taxpayer takes their own number. Werner stated in La Crosse, Wisconsin, there is no Q-Lite or Q-Matic system, so it's first come first served.

Thompson asked if the TACs are getting smaller. Jones answered that some areas are having difficulty hiring, but there are no real statistics.

Minutes approved as submitted.

TAC Visits

- **Observation Review (Louise McAulay, Dave Monnier, and Herb Bohrer)**

Louise McAulay stated that all TACs seem to work the same regardless where you are and she thinks it is because of the rule books that are followed. They just started a courier service in Charlottesville, SC. McAulay did not ask how much the courier cost, but the person from Greenville, SC, didn't think courier service was going to be cost effective.

Jones stated there is an analyst in Headquarters that manages the contracts and cost for courier service. When the courier service was put into process, cost was not the first thing looked at. We also looked at safety for the employees. It is true that some offices receive \$25 cash and some \$25,000, but the safety of employees was why the courier service was adopted.

Roy Block said we will include some ideas on what will improve cash collection processes and this will be incorporated in the report to the director. Bob Fett noted he used to be a TAC employee and carried large amounts of cash to the bank to convert to money orders. He was glad to see the courier service implemented.

Beth Braddock noted if the taxpayer provides a check or money order and wants a receipt, they get an Form 809 Receipt. Otherwise they receive a copy of the check stamped proof of delivery. This stamp is just one of the stamps each employee has.

Any TAC employee that uses the Form 809 Book is restricted as to what they can or cannot do in the Integrated Data Retrieval System (IDRS).

McAulay stated that all employees can receive cash payments, but not all at once. She understood that all four of the TAC employees are certified and they rotate. Per Fett, the Form 809 Book task is rotated by month. When rotated, the current book is actually sent back to IRS and the next employee taking the task over gets a new book for their month.

Dave Monnier stated he went to Columbus and Indianapolis, IN, where he met the TAC Manager Sally Wright. She manages both TACs so he met her both times. The Indianapolis TAC has 11 employees and about 2,000 square feet. When he arrived there were 20 people waiting and they had six employees actually servicing people. They have a screener that questions each person and checks their documents, then selects their category from the Q-Matic, which has ten different queues. There are two lines, one for cash payments and one for non cash payments. If the screener feels they have



all the correct documents they can get in one of the lines. They would like to have a check reader as that would speed things up.

The Columbus TAC is a much smaller office of about 150 square feet and has two employees to handle customers. The customer selects their own ticket, but there was only one queue. The employees would send the taxpayers to the gas station to get a money order. The main customer base is truck drivers and farmers making payments and is mostly older people. The standard set of questions were asked; one question being, "How many payments do you take per day?" In Indianapolis it was an average of 13 per day and about \$76,000 dollars over six months. Based on these figures we ended up with 300 people per \$12,000 which is \$40 per average payment for Indianapolis. The Columbus one worked out to be about \$18 per payment.

Werner questioned if employees were asked what would be helpful for payments with Form 2290, Heavy Highway Vehicle Use Tax Return. Monnier stated that the employees said they asked customers to use EFTPS to pay over the internet.

Block noted that this is an ongoing process. It will never be mandated to make everyone use electronic filing or paying, as there is a part of the population that will not work with electronics. You are also dealing with taxpayers that don't have bank accounts. We will have to always embrace the opportunity with the taxpayer that pays cash.

Werner stated that as time moves on don't you think people will be more comfortable using electronics? Block agreed with Werner saying that he can see it moving forward in that way.

Ann Spiotto asked if the IRS can put an announcement out stating they cannot take cash and stress you must bring in a money order or have a checking account.

Werner stated that Becky Facer, TAC Manager in La Crosse, WI, advised the rural areas deal a lot with cash; they don't trust the electronic services. Block noted that when you say we cannot accept cash, we really do not know what the taxpayer is going through; we need to have something available for all taxpayers who come to the office.

A suggestion was brought up on the use of Form 8109 B, FTD Deposit Form – (Over the Counter Version). Why can't a customer take a Form 8109 coupon to their bank and have the bank wire the money to Treasury and send the coupons to the IRS. A comment was made that a background check would need to be done and there was concern as to who is authorized to receive the coupons.

Linda Baker suggested having IRS employees at a post office or bank to accept payments. Block responded that staffing cost could be an issue. Thompson commented there are Volunteer Income Tax Assistance (VITA) people at banks late in the afternoon even after closing hours and they may be open to doing something like this.

Baker added Field Assistance has received an increase in budget and they do hire seasonal employees during the filing season.

Bohrer stated he is struck by the odd way the IRS processes cash payments and wondered how they managed before the courier service; and although the courier service is good for safety of employees there must be a better system. Bohrer asked the TAC manager he visited if he thought there was a better way and the manager's response was to allow individuals to use the Form 8109 Coupon and take their payment to the bank as well as give them a receipt to process it.

The two outlying smaller TACs only have one full time employee and one seasonal employee. The seasonal employee has the Form 809 Book and feels this is a limitation on a smaller office. You have to have at least two people to process cash payments, one who takes cash and one who reviews the



cash payments being made. The receipt book restricts the employee on what they can do. If they are handling the receipt book they cannot do any account adjustment work.

A comment was made that if a customer wants to pay by credit card there is an additional fee for the transaction. If a customer chooses to file that way they will have to pay that fee, it is part of the bill.

Fett stated there is a concern that banks will protest using Form 8109 Coupons because one of their tellers would process the IRS transactions and prevents them from doing banking business.

Block stated he did a little checking on that system. When a business deposits payroll taxes through the banking system using a Form 8109 Coupon, the bank can hold up the money for three days before the deposit goes to the Treasury.

- **Identify Common Observations and Concerns (Tommy Thompson)**

Thompson would like everyone to look at Bohrer's seven step diagram when there is an opportunity – this is basically the same process the Post Office uses. The seven steps may be helpful later on.

Thompson would like everyone to give a short report at the face-to-face meeting and we will be doing diagramming on the board, as well as listing concerns and issues. We'll have subcommittees work on those issues.

Next Steps (Tommy Thompson)

- **Where do we go from here?**
- **Observation review for April and May**

Ann Spiotto will discuss her report on the April teleconference and Dean Condor will review his report, too. Patti O'Neill will discuss her report in May, as well as any remaining panel members who have completed their report for their TAC visits.

Program Owner Comments (Beth Braddock)

- **Cash Receipts**

The cash receipts spreadsheet provided in the pre-read information lists cash receipts only. Not all TACs will be listed as not all TACs take cash.

- **Comments from Customer satisfaction cards**

It was suggested at the last meeting to pull the customer satisfaction cards of customers who made payments in a TAC. Braddock talked to the analyst in charge of the survey cards who advised there are 450,000 cards. It is not feasible to go through the comment cards to review the comments from people making payments.

- **Time spent in TACs on payments**

For fiscal year of 2008 there were 1,097,753 taxpayers with payments in TACs. This may exclude some of the payments received, for example if several issues were covered in one visit, the contact would be recorded under the category that took the longest. The time spent on payments was



161,445 hours. Payments received in TACs are then sent to the campus. Jones advised a good contact point in submission processing is Edna Banks.

Office Updates (Roy Block)

The Milwaukee Office is in the middle of preparing for a Town Hall meeting scheduled for Oklahoma City, OK on April 26. Lisa Gabriel and Smiley have designed a payment posting envelope for the TAC office and we think it could be part of the answers for the payment process in TACs.

Member Comments/Closing (Tommy Thompson)

Thanks to the guests who joined us.

Meeting Adjourned

Next Teleconference is Tuesday, April 28, 2009 at 1:00 pm CST



**Taxpayer Assistance Centers (TAC) Committee
Teleconference Meeting Minutes
Tuesday, February 24, 2009**

Program Owners

- Beth Braddock - Program Analyst
- Jane Brough - Supervisor

Committee Members Present

- Bohrer, Herbert - Springfield, ID - Member
- Conder, Dean - Lakewood, CO - Member
- Fretheim, Daniel - Decorah, IA - 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

Committee Members Absent

TAP Staff

- Block, Roy - Milwaukee, WI - Manager
- Smiley, Ellen - Milwaukee, WI - Program Analyst
- Gabriel, Lisa - Milwaukee, WI - Secretary

Welcome/Announcements/Review Agenda (Tommy Thompson)

Tommy Thompson noted we need to add to the agenda the approval of last month's meeting minutes.

Roll Call (Lisa Gabriel)

Quorum met

Minutes approved

Vice Chair (Tommy Thompson)

- **Position available**
- **Vote for vice chair**

Melissa Bensen is leaving TAC to go to another Issue Committee. Ann Spiotto volunteered to be the new Vice Chair; all of the committee members were in favor. Spiotto is now the new Vice Chair. Roy Block added that Bensen was on two Issue Committees and the staff addressed the issue with her that she may be stretching herself to thin in providing support on both issue committees. Bensen opted to stay on the Multi-Language Issue Committee.



TAC Visits (Tommy Thompson)

- **What to look for in your visits**
- **Writing your observations**
- **Observations**

Thompson advised what to look for in the Taxpayer Assistant Center (TAC) visits. As an example, look for taxpayers making payments and find out if they are asking for a receipt. Walk through the entire process of a taxpayer making a payment. Look at the process itself from the time the taxpayer enters the building. Make note as to whether the TAC office uses Q-Matic full or Q-Matic lite. Is the taxpayer signing in? Also observe during this process the wait time for a taxpayer to be served and look for types of payments.

Thompson explained in reviewing Mary Jo Werner's write up, one of the observations she made in her TAC visit was that payments with the Form 2290, Heavy Highway Vehicle Use Tax Return, was the most frequent payment in the La Crosse, WI TAC. Werner also asked the TAC manager if the United States Post Office reduced their delivery days, would it affect the number of people going to TAC to make payments? The manager said it would affect them. In La Crosse the TAC is only supported by one employee and as a result, that employee cannot take cash payments. Werner also mentions the need to have a better way of giving receipts. The Form 809, Receipt of Payment for Taxes, is an internal form for receipt of cash payments or checks. Smaller TACs cannot provide receipts. .

Thompson notes we also need to look at the courier service over the next couple of months when we are making our visits. If you have any questions after your visit, you need to get back with the TAC manager and get any questions answered. When you make your visits there are a couple ways to have the observations written up. Werner did her write up very well and asked all the standardized questions. You may want to write it up as a history in the day of TAC mentioning what you see and observe. When your write up is complete, forward it to Ellen Smiley and she will send it out to all the panel members as she receives them. At the next teleconference we can get into more detail about those visits. For the face to face meeting we will have some diagramming and address the focus points we have been asked to look at. We want to continue to look at the outline areas of our focus sent out by the TAC Managers. On our first day of the face to face we will be spending time that afternoon and the next day, where we can focus on four to five of those issues and then break out in subcommittees for the next day.

Louise McAulay's stated her observations were based on compare and contrast with the sites she visited. They were actually very close in their processes. The Florence, South Carolina manager also manages two other TACs, and the Columbia, South Carolina manager also manages another site. Talking to both managers she was given an overview of the state. They really are very similar. They all use the Q-Matic system except for the TAC at Myrtle Beach, South Carolina. The Columbia office is larger which has an affect on how many can be served. The processes are the same for both TACs. In Florence she was able to talk to staff members, however they were very busy in Columbia and when she left there were 20 people outside waiting for the greeter. The Columbia TAC had a greeter, but Florence did not. The Florence TAC employee stated that many taxpayers do not know how to use the Q-Matic. In Columbia the taxpayers didn't see the Q-Matic system as the greeter took care of it. Beth Braddock said ideally the Internal Revenue Service (IRS) employee should be handling the Q-Matic by handing out the tickets and it should not be self served.

Dave Monnier added that the manager of the Indianapolis, Indiana TAC said, if you let the taxpayer select the choice of Q-Matic tickets, they will select for every category just to get served faster in case one category is moving faster than the others. Jane Brough said a small TAC would have Q-lite and the taxpayer would have a button to push, where in the larger TACs they have a greeter and we want the greeter to hand out the ticket, but for smaller TACs we do rely on the taxpayer to push their own button. However, in a smaller one the TAC Manager can choose how many buttons to make available



to push. We had instances where it was limited to one, but having multiple codes make sense, again it is up to the manager.

The Q-Matic system can have a gate set up to have one employee to accept all the payments. Dean Condor noted this is one of the main issues of the Manager in Denver; Colorado. The TAC manager tried to set the Q-Matic system, but the vendor in Atlanta, Georgia said not to because it will corrupt it. Brough noted the system in Denver has had the most trouble. Only a large TAC, which is seven or more employees, has a greeter.

Werner reported when she met with Becky Facer she found out she manages five locations. In Wisconsin she manages La Crosse, Madison, Eau Claire, and Rothschild, and also Rockford, Illinois. The La Crosse TAC does not have a Q-lite. It is set up as a mini TAC and there are safety issues with the structure. The La Crosse TAC cannot collect any cash payments as there is only one employee in the office and in order to collect cash payments there has to be at least two employees in the office. Facer and Werner also spoke about how to make it easier accepting payments with the Form 2290. The taxpayers have to physically drop off payments and her suggestion is if it could go to an electronic system it would be more efficient for truck drivers. This would eliminate a lot of traffic.

Roy Block noted that next year it will be mandatory for truckers to file electronically. Braddock added that electronic filing will be required of large truckers who have 20 or more trucks. Werner stated that the truckers are the biggest cash payers. Also this TAC is in the same structure as the Post office so it is convenient for the taxpayer to go to the Post Office and get a money order. This TAC does not use a formal receipt, but will make a photo copy of check and IRS stamp it. The La Crosse TAC does not have courier service but Madison does. The Madison office cannot receive cash at this time because they do not have 809 status yet. Receiving cash is a four person process because it involves a courier.

Facer advised that when she first started going to the La Crosse TAC there was an open concept. There was a red phone the taxpayer could use to get help with tax questions. This allowed for the taxpayer to be sent to a person who has more expertise for their questions and leave the TAC employee available for other issues. However, the phone was stolen. Facer also noted if the office could be streamlined that would help for staffing and be more efficient. Werner also noted that Facer said that taxpayers need to be taught how to use EFTPS (Electronic Federal Tax Payment System). This will allow installments to be taken out of their accounts on the 15th of each month. Many taxpayers were shocked to hear that they can have it taken out of their account and not have to come in each month to physically pay. This includes the 1040ES (Estimated Tax for Individuals).

Instead of using the toll free number some people like face to face service. An example, with banks you call a number and press one for this or two for that and some taxpayers just want face to face service. With any installment agreement there is a fee. The installment agreement fee is \$105.00. If you want to encourage taxpayers to sign up for the electronic agreement to make installment payments you may want to consider eliminating the fee, this would create better participation and payments will be made on time, instead of taxpayers coming in each month. Braddock stated there is a reduce fee for Electronic Fund Transfer Payments (EFTP). Braddock added, if you are requesting an installment arrangement the fee is \$105.00 but the fee can be reduced to \$52.00 to set up plan for electronic payments. Block added the user fee is the cost to support the program, but Smiley said if you eliminate the fee you will have more that may sign up for EFTP. Thompson followed with that this may be something we can look at down the road. As observations come in Thompson wants Smiley to send them out to all panel members.

Action Item / Update (Beth Braddock / Jane Brough)

- **Amount of money received in TAC's in a year**

Thompson asked if there is a way to determine the amount of payments being received in each TAC. Brough noted that we do not track total dollar amount received, but couriers do track cash receipts.



Brough responded we track the number of taxpayers that come into each TAC for each payment. We have started tracking the accounting function, but don't have it available for the full year. Braddock will contact Peggy Sue Unander to get that information. The only data available is starting from January 1, 2009.

Thompson asked if anyone thinks the value of having the figures on amount of cash received is as important as how many taxpayers came into the TAC with payments. Condor feels it is a value to have both figures.

Everyone in a TAC can accept payments, but only some can accept cash and prepare Form 809. The Form 809 book is registered to a person and only that person can use the book. Brough stated this is based on internal control and working with the accounting office. Internal controls are built into system. We are trying to do application to do online, but still need internal controls. Another issue that came up earlier regarding a TAC visit is a TAC with one person cannot accept cash payments, again that is an internal control requirement.

Next Steps (Tommy Thompson)

- **Suggestion box in TAC's**
- **Observe other agencies**

Werner suggested having a suggestion box in the TACs to have taxpayers provide information on how they think the payment process could be improved. For safety reasons TACs will not have a suggestion box. There are not even waste baskets in plain view. Braddock stated that all TACs should be giving customers a satisfaction card to complete. Smiley stated our current focus is on improving the payment process for taxpayers. Brough added that we have a summary of comments from customer satisfaction cards. Last month a comment card was received that said "why don't you have a payment line?" This was from a medium size TAC. Brough and Braddock will provide comments from those customer satisfaction cards.

Block suggested visiting other agencies to view their payment process. An example, observe the State Department of Revenue as they would have a similar process for payments. Per Werner, the State of Wisconsin is going to be closing their payment offices. Thompson noted the next time you go to your post office, observe what they do. The post office has a process of receiving payments via their envelope that also has a payment receipt to tear off and give the customer. The envelopes are then put in a bag which is delivered to a bank at the end of the day and this process works well. Only one person in post office does handle all payments.

John Leggett noted that convenience stores also do a similar method of collections. Thompson added observe the security of this method. Maybe look at how the Social Security office has their process set up.

Program Owner Comments (Beth Braddock)

Braddock stated we know that we sent procedures out about cash payments as opposed to non-cash payments and not every TAC can take cash payments. Brough added when observing other agencies with Q-Matic systems, the systems may be different than what we use in our TACs. The Social Security Administration has a system like Q-Matic, but it is quite different. You can also look at the Q-Matic system at the Department of Transportation. Braddock noted not all TACs have a Q-Matic system due to the structure of the office, as they may not have the electric set up and they are trying to remedy those

Office Updates / Face to Face Meeting (Roy Block)

A discussion took place on the time of day to have the meeting for the Face to Face meeting in Denver, Colorado. On June 18, 2009 the meeting times will be 1:00pm to 5:00 pm, on June 19, 2009



it will be 8:00am to 5:00, and finally on June 20, 2009 it will be 8:00 am to 12 noon. Thompson requested that Lisa Gabriel send out travel itineraries of each panel member to all panel members so members can possibly share a taxi and save money.

Member Comments/Closing (Tommy Thompson)

This was a good meeting and when you are out on your TAC visits make a list of questions of observations.

Meeting Adjourned

Next Teleconference: Tuesday, March 24, 2009 at 1:00 pm CST