

PIVOTING AWAY FROM PAPER

How the IRS Can Overhaul Customer Service and Transform its Business Practices
IRS Oversight Board Public Forum Agenda | May 13, 2014

Internal Revenue Service
7th Floor Auditorium
1111 Constitution Ave. NW
Washington, DC

To register, go to:
<http://www.cvent.com/d/c4qwnx>

Access Information
Attendees must enter the IRS building through the main entrance at 1111 Constitution Avenue, Washington, DC 20220, and proceed through security with a valid government photo identification (driver's license, passport, military id, etc). Attendees will be escorted from the building entrance to the 7th floor auditorium. Please allow extra time for security clearance.

Welcome and Introductions | 9:00 – 9:15

Paul Cherecwich, Jr., Chairman, IRS Oversight Board

PANEL 1: Revisiting Successful Customer Service Strategies Outside of Tax Administration | 9:15 - 10:15

The panel will discuss successful customer service overhauls outside of traditional tax administration, and the strategies employed to realize the transformations. Panelists will have a wide range of experience transforming customer service offerings of agencies at the federal, state, and local level. Potential topics to be covered include: balancing customer service across channels, encouraging customers to use “digital first,” and lessons learned from various transformations.

Moderator: Bob Tobias, IRS Oversight Board

- Panelists:
- Randy Miskanic, Vice President, Secure Digital Solutions, United States Postal Service
 - Martha Lambie, Assistant Deputy Commissioner for Operations, Social Security Administration
 - Dave Burhop, Deputy Commissioner & Chief Information Officer, Virginia Department of Motor Vehicles
 - John Sapp, Council for Electronic Revenue Communication Advancement (CERCA)

Break | 10:15 - 10:30

PANEL 2: Using Technology to Increase Customer Service for Taxpayers and Preparers | 10:30 - 11:30

Building upon the discussion from the first panel, this panel will discuss how the IRS can provide better service to taxpayers and tax preparers by leveraging technology to overhaul customer service across channels. Potential topics include: comprehensive online services for taxpayers, providing data services for tax professionals, major roadblocks to pivoting away from paper processes, and balancing the funding for providing services today with investing in services for the future.

Moderator: Paul Cherecwich, Chair, IRS Oversight Board

- Panelists:
- Thomas H. Mattox, New York State Commissioner of Taxation and Finance
 - Anne Miller, Division Chief, Filing Division, California Franchise Tax Board
 - Jim Buttonnow, Electronic Tax Administration Advisory Committee (ETAAC)
 - Larry Gray, National Association of Tax Professionals (NATP)
 - Paul La Monaca, National Society of Tax Professionals (NSTP)

Conclusion and Closing Comments | 11:30 – 11:45

Paul Cherecwich, Jr., Chairman, IRS Oversight Board