

Attachment I: Printable Phone Forum Event Evaluation:

OMB #1545-1342



Internal Revenue Service

IRS Stakeholder Liaison Event Evaluation

Name of Event: **TBD** Date of Event: **TBD** Name of Presenter(s): **TBD**

1. Where is your business or organization located?

- | | |
|--|---|
| <input type="checkbox"/> Central - (IL, IN, MO, KS) | <input type="checkbox"/> Great Lakes - (MI, OH) |
| <input type="checkbox"/> Mid-Atlantic - (PA, NJ, DE, WV) | <input type="checkbox"/> Mid-South - (KY, TN, AL, MS, AR, LA, OK) |
| <input type="checkbox"/> Mid-West - (MN, WI, ND, SD, NE, IA) | <input type="checkbox"/> New York |
| <input type="checkbox"/> Northeast - (MA, ME, NH, VT, RI, CT) | <input type="checkbox"/> Northwest - (WA, OR, NV, AZ, UT, ID, MT, WY) |
| <input type="checkbox"/> South Atlantic - (DC, MD, VA, NC, SC) | <input type="checkbox"/> Southeast - (FL, GA) |
| <input type="checkbox"/> Southwest - (TX, NM, CO) | <input type="checkbox"/> Western - (Southern CA, AK, HI) |
| | <input type="checkbox"/> Western - (Northern CA) |

2. What (if any) professional organizations do you belong to? (Select all that apply)

- AAA-CPA ABA AICPA ALPFA IPPA NABA None
 NAEA NATP NCCPAP NSA NSTP Other _____

3. How did you learn about this event?

- IRS - eNews IRS - email IRS - Tax Talk Today
 Internet Friend / Associate Media (newspaper, TV, etc.)
 Employer Prof. / Trade Organization Other _____

PLEASE CHECK ONLY ONE BOX PER QUESTION.

For each question, please indicate your opinion by choosing a number from 1 to 5, "1" means "Very Dissatisfied" and "5" means "Very Satisfied."

		(1) Very Dissatisfied	(2) Dissatisfied	(3) Neutral	(4) Satisfied	(5) Very Satisfied
4	The main presenter's knowledge on the subject matter discussed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	The technical content of the presentation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	The time set aside for you to ask questions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Overall QUALITY of the event.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	Overall SATISFACTION with the event.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please provide us your ideas for future topics and comments or suggestions concerning this event.

Paperwork Reduction Act Notice

The Paperwork Reduction Act requires IRS to display an OMB Control Number on all approved information requests. About three minutes will be needed to complete this voluntary questionnaire. If you have any comments regarding the time estimates associated with this study or suggestions on making the process simpler, please write to:

Thank you for your time!

Internal Revenue Service
Tax Products Coordinating Committee
SE, W. CAR. MP. T. T. SP
1111 Constitution Ave. NW
Washington, DC 20224

Attachment II: NPF IRS.gov Advertisement Example:

Nationwide Practitioner Liaison Meetings, Phone Forums and Seminars

NATIONWIDE LIAISON MEETING

- Currently, there are no Nationwide Liaison Meetings scheduled.

NATIONWIDE PHONE FORUM

- [National Phone Forum - Forms 1099: Information Reporting](#) (Nov 28)
- [National Phone Forum - Electronic IRS Update](#) (Dec 19)

NATIONWIDE PHONE FORUM

Meeting: National Phone Forum - Forms 1099: Information Reporting

Date(s): November 28, 2007

Time: 10 a.m. Eastern; 1 p.m. Eastern; 4 p.m. Eastern

Location: National Phone Forum

Contact: Jeanne Martin; Phone: (702) 868-5138; E-mail:

Jeanne.M.Martin@irs.gov

Who Should Attend?

- Tax practitioners
- Business owners and organizations
- Accountants and bookkeepers
- Payroll professionals

Why Attend?

- Overview of Information Reporting
- Form 1099-MISC and issues
- Filing requirements and methods
- How to make corrections

Earn Continuing Professional Education Credit:

- Enrolled agents receive one CPE credit for a minimum 50-minute participation
- Other tax professionals may receive credit if they qualify per their organization
- You need to register individually and use your personal identification number (PIN) to receive credit
- Call in on a separate line to verify attendance

Sign up now! Here's how:

We are offering three different sessions for this class. Shown below are the scheduled times for the classes, with all time zones indicated. Times have been staggered to give participants a variety of choices. Select the time that works best for you.

**CONFERENCE ACCESS CODE EASTERN CENTRAL MOUNTAIN
PACIFIC**

191355: 10:00 a.m. EST, 9:00 a.m. CST, 8:00 a.m. MST, 7:00 a.m. PST

510438: 1:00 p.m. EST, 12:00 p.m. CST, 11:00 a.m. MST, 10:00 a.m. PST

749158: 4:00 p.m. EST, 3:00 p.m. CST, 2:00 p.m. MST, 1:00 p.m. PST

The number of phone lines is limited and reservations are on a first-come, first-served basis. Please let us know if you registered and will not be able to attend as a fee is charged to the IRS for each unused line.

Register at the AT&T TeleConference Service Web site (www.attevent.com). You will be assigned a PIN that must be used to join the conference. If you have not registered with AT&T you will need to click on "create a profile" first.

Register by November 26, 2007. We will e-mail materials for the class on November 26, 2007. If you do not receive this e-mail by noon on November 27, 2007, e-mail us at: Nationalphoneforum@irs.gov to request the presentation materials. Please note "materials" in the subject line of your message.

Dial in on November 28, 2007:

Toll free: (866) 216-6835

Toll: (913) 227-1220

- Dial in 3-5 minutes early
- Enter your access code, followed by the pound (#) sign
- Enter your assigned PIN, followed by the pound (#) sign
- Your line will be placed on hold with music until the conference starts.

If you have any problems registering or creating a profile at the AT&T TeleConference Services Web site (www.attevent.com), please call AT&T at (800) 932-1100.

If you have any questions regarding the phone forum itself, you can e-mail us at: Nationalphoneforum@irs.gov. Please put "Form 1099" in the message subject line.

Sponsored by: Stakeholder Liaison - Field

Meeting: National Phone Forum - Electronic IRS Update

Date(s): December 19, 2007

Time: Listed below

Location: Conference Call from home or office

Contact: Linda VanderLaan; Phone: (616) 235-1692; E-mail:

linda.vanderlaan@irs.gov

Remarks: Cost: FREE

Who should attend?

- Tax practitioners
- Other tax professionals
- Payroll professionals

Topics:

- Overview of 2008 enhancements
- Basics of business e-filing
- Benefits of electronic filing
- Electronic filing resources

Earn Continuing Professional Education Credit:

- Enrolled agents receive one CPE credit for a minimum 50-minute participation
- Other tax professionals may receive credit if they qualify per their organization
- You need to register individually and use your personal identification number (PIN) to receive credit
- Call in on a separate line to verify attendance

Sign up now! Here's how:

We are offering three different sessions for this class. Shown below are the scheduled times for the classes, with all time zones indicated. Times have been staggered to give participants a variety of choices. Select the time that works best for you.

CONFERENCE ACCESS CODE

254386: 10:00 a.m. EST, 9:00 a.m. CST, 8:00 a.m. MST, 7:00 a.m. PST

792741: 1:00 p.m. EST, 12:00 p.m. CST, 11:00 a.m. MST, 10:00 a.m. PST

187668: 4:00 p.m. EST, 3:00 p.m. CST, 2:00 p.m. MST, 1:00 p.m. PST

The number of phone lines is limited and reservations are on a first come, first served basis. Please let us know if you registered and will not be able to attend as a fee is charged to the IRS for each unused line.

Register at the AT&T TeleConference Services Web site (www.attevent.com). You will be assigned a PIN that must be used to join the conference. If you have not registered with AT&T you will need to click on "create a profile" first.

Register by December 14, 2007. We will e-mail materials for the class on December 17, 2007. If you do not receive this e-mail by noon on December 18, 2007, e-mail us at: Nationalphoneforum@irs.gov to request the presentation materials. Please note "materials" in the subject line of your message.

Dial in on December 19, 2007:
Toll free: (866) 216-6835
Toll: (913) 227-1220

- Dial in 3-5 minutes early
- Enter your access code, followed by the pound (#) sign
- Enter your personal PIN, followed by the pound (#) sign
- Your line will be placed on hold with music until the conference starts

If you have any problems registering or creating a profile at the AT&T Teleconference Services Web site (www.attevent.com), please call AT&T at (800) 932-1100.

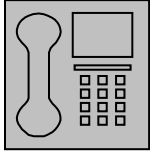
If you have any questions regarding the phone forum itself, you can e-mail us at: Nationalphoneforum@irs.gov. Please put "E-file" in the message subject line.

Sponsored by: Stakeholder Liaison – Field

[Accessibility](#) | [FirstGov.gov](#) | [Freedom of Information Act](#) | [Important Links](#) | [IRS Privacy Policy](#) | [U.S. Treasury](#)

Attachment III: Talk Tax Today Advertisement Example:

IRS Stakeholder Liaison presents:



National Phone Forum

Forms 1099: Information Reporting

Date: November 28, 2007

Location: The convenience of your office

Cost: FREE

Be our guest:

- Tax professionals
- Industry association members
- Representatives from small business organizations
- Small business owners, accountants or bookkeepers
- Government agencies

Learn about Information Reporting:

- Overview of Information Reporting
- Form 1099-MISC and issues
- Filing requirements & methods
- How to make corrections

Earn Continuing Professional Education credit:

- Enrolled agents receive one CPE credit for a minimum 50-minute participation
- Other tax professionals may receive credit if they qualify per their organization
- Register individually and use PIN to receive credit
- Call in on a separate line to verify attendance

Attachment IV: NPF Enrollment Confirmation Notice Example:

Thank you for registering to attend the Nationwide Phone Forum on Foreign Bank and Financial Account Reporting.

Conference Title: Foreign Bank Account Reporting (FBAR)

Moderator Name: Mary Marcotte, Stakeholder Liaison

This conference is scheduled to begin: Wednesday, June 20, 2007, 10:00 a.m. Eastern
(9:00 a.m. Central, 8:00 a.m. Mountain, 7:00 a.m. Pacific)
Time zones shown are Daylight Savings Time.

Conference dial-in number: Toll free: **1-866-216-6835**

Conference access code: **358400**

Participant PIN:

Participant information:

- Please dial in 3-5 minutes prior to conference start time.
- Enter your access code, followed by the pound (#) sign.
- Enter your Personal Identification Number (PIN), followed by the pound (#) sign.
- Your line will be placed on hold with music until conference start.

Our guest speakers will be Sheila Andrews, Stakeholder Liaison; Gary Watkins, Program Analyst, Bank Secrecy Act; and Elizabeth Witzgall, Senior Bank Secrecy Act Analyst.

Your Syllabus is attached below.

Requirements:

- Adobe Acrobat Reader must be installed on your computer to view/print the Acrobat files. You can download Adobe Reader from the following link:
<http://www.adobe.com/products/acrobat/readstep2.html>
- Your e-mail client/program should be configured to view e-mails in HTML format instead of text so that your CPE Certificate of Completion will properly format.
- Your e-mail spam filter should be set to accept e-mail from nationalphoneforum@irs.gov.

Note: Enrolled Agents will be entitled to 1 CPE credit provided they participate in the phone forum for at least 50 minutes; other tax professionals may qualify depending on the requirements of their organizations. You must register individually and use your PIN to receive CPE credit. Each person must call in on a separate line so attendance can be verified.



Phone Forum Syllabus

Foreign Bank Account Reporting (FBAR)

Forum Date: Wednesday, June 20, 2007
Forum Time: 10:00 a.m. EDT

Description and Learning Objectives:

Learn about FBAR and how it works:

- Combats the use of foreign financial accounts to circumvent U.S. Tax Law
- Requires U.S. taxpayers with certain foreign accounts to file TD F 90-22.1
- Provides leads to investigators to identify and trace funds used for illicit purposes

Presentation Method and Instructor(s):

An IRS phone forum is an interactive learning experience with live instruction via conference call. This forum's instructors are:

- Gary Watkins, Program Analyst, Bank Secrecy Act – Gary has been in his current position since October 2005. He began his IRS career with the IRS in 1986 as a Revenue Agent assigned to the Compliance Enforcement Team. Previous to his current position, he was a Senior Tax Specialist in Taxpayer Education and Communication (TEC). Gary has a BS in Business Administration from The Citadel, Military College of South Carolina and an MBA from the University of Tennessee.
- Elizabeth Witzgall, Senior Bank Secrecy Act Analyst – Elizabeth has developed and instructed numerous classes on the Bank Secrecy Act from the mid 1990's to present, including several classes on FBAR. She was a presenter on FBAR during two IRS Video Teleconferences (2003 and 2004) and also assisted in the development of an FBAR DVD in 2004. She has a J.D. from Columbia University School of Law and is a member of the District of Columbia Bar Association.
- Sheila Andrews, Stakeholder Liaison – Sheila has been with the IRS for over 20 years. Her prior positions with the IRS include: Analyst in the Taxpayer Advocate Service; Manager in the Customer Service Division, including several years as the Accounts Manager; Taxpayer Educational Specialist in the Volunteer and Education Program; and a Taxpayer Service Representative. She is a graduate of Purdue University and has completed graduate studies at Auburn University and College of Saint Frances.

Presentation Materials (to be sent in a separate e-mail):

- Publication 4261, *Do You Have a Foreign Bank Account?*
- Power Point presentation (in PDF format) entitled *Report of Foreign Bank and Financial Accounts*
- Please note that all presentation slides are numbered. The instructors will be referring to slide numbers so that you can easily follow along.

Resources/Handouts:

- [The Tax Gap](http://www.irs.gov/newsroom/article/0,,id=158619,00.html) is the difference between the amount of tax that taxpayers should pay and the amount that is paid voluntarily and on time. The tax gap can also be thought of as the sum of non-compliance with the tax law. To find more information on visit our Web site page at:
<http://www.irs.gov/newsroom/article/0,,id=158619,00.html>.
- [Issue Management Resolution System \(IMRS\)](http://www.irs.gov/businesses/small/article/0,,id=158507,00.html) - The IRS Stakeholder Liaison (SL) function has established the Issue Management Resolution System (IMRS), a streamlined and structured process that facilitates stakeholder issue identification, resolution and feedback.
(<http://www.irs.gov/businesses/small/article/0,,id=158507,00.html>)
- [Practitioner Local Liaison Meetings, Phone Forums and Seminars](http://www.irs.gov/businesses/small/article/0,,id=127801,00.html)
(<http://www.irs.gov/businesses/small/article/0,,id=127801,00.html>)
- [Join e-News For Tax Professionals](http://www.irs.gov/newsroom/content/0,,id=164580,00.html)
(<http://www.irs.gov/newsroom/content/0,,id=164580,00.html>)

Point of Contact: If you have questions, please contact Sheila Andrews at 317-685-7549, or e-mail nationalphoneforum@irs.gov.

Evaluation: Please send any comments or observations to nationalphoneforum@irs.gov.

Course records retained by:
Internal Revenue Service, Stakeholder Liaison
Shane Ferguson
1720 S. Southeastern Avenue, #100
Sioux Falls, South Dakota 57103



AT&T TeleConference Service
IT'S NEVER BEEN EASIER TO CALL A MEETING

Please **DO NOT REFRESH THIS PAGE**. Doing so will create a duplicate submission.

Below is your Personal Identification Number (PIN) needed to access the conference. When dialing into the conference, you will be asked to enter your Access Code and PIN.

Name: Lorraine Maguire

PIN: 5989

Here are the details for your AT&T Event Deluxe Service Conference:

Conference Name: 880587/ Form 1099 Info Reporti

Access Code: 749158

Toll-Free Phone: 1-866-216-6835

Toll Phone: 1-913-227-1220

Next Conference Time: 11/28/2007 at 4:00 PM

Conference Times: *(Shown in Eastern Time)*

- Wednesday, November 28, 2007, 4:00 pm for 60 minutes

+

Attachment V: Event Evaluation Cover letter Example:

Dear National Phone Forum Participant:

We are looking for your feedback on today's Nationwide Phone Forum entitled **"Correspondence Examinations 'Understanding the Process and Working Together'"**. Please take a moment to complete the attached evaluation. The evaluation should only take 3 minutes to complete.

Survey instructions:

You must have Microsoft Word installed on your PC to participate in the event evaluation form.

1. Open the attached evaluation.
2. The event evaluation is best viewed in print layout. To change your layout setting select 'Print Layout' from the View menu.
3. After opening the attached event evaluation you may be asked to 'enable macros' within the form. Please select 'enable macros'.
4. Once finished, save and attach your completed event evaluation to an email addressed to sbse.sl.survey.mail@irs.gov.

Thank you again for your participation. If you have any issues with the event evaluation process please contact Cait DeStefano at 856-237-7828. If you have any questions for the National Phone Forum Team you can contact them directly at nationalphoneforum@irs.gov.

Note: Completion of this evaluation is NOT a requirement for participants to receive their CPE credit.

Thank you,

The National Phone Forum Event Evaluation Team

Attachment VI: Phone Forum Event Evaluation:

OMB #1545-1342



IRS Stakeholder Liaison

Event Evaluation

Name of Event: TBD

Date of Event: TBD

Name of Presenter: TBD

Completed surveys should be emailed to: SBSE.SL.SURVEY.MAIL@IRS.GOV

1. Where is your business or organization located? Select One

2. What (if any) professional organizations do you belong to? (Select all that apply)

- AAA-CPA
 ABA
 AICPA
 ALPFA
 IPPA
 NABA
 None
 NAEA
 NATP
 NCCPAP
 NSA
 NSTP
 Other

3. How did you learn about this event? Select One

PLEASE CHECK ONLY ONE BOX PER QUESTION.

For each question, please indicate your opinion by choosing a number from 1 to 5, "1" means "Very Dissatisfied" and "5" means "Very Satisfied."

	(1) Very Dissatisfied	(2) Dissatisfied	(3) Neutral	(4) Satisfied	(5) Very Satisfied
4 The main presenter's knowledge on the subject matter discussed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 The technical content of the presentation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6 The time set aside for you to ask questions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7 Overall QUALITY of the event.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8 Overall SATISFACTION with the event.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If you have ideas for future topics and comments or suggestions concerning this event, please email them to: NationalPhoneForum@irs.gov.

Paperwork Reduction Act Notice

The Paperwork Reduction Act requires IRS to display an OMB Control Number on all approved information requests. About three minutes will be needed to complete this voluntary questionnaire. If you have any comments regarding the time estimates associated with this study or suggestions on making the process simpler, please write to:

Internal Revenue Service
Tax Products Coordinating Committee
SE:W,CAR,MP,T,T:SP
1111 Constitution Ave. NW
Washington, DC 20224

Thank you for your time!

Attachment VII: Event Evaluation Reminder Letter Example:

Dear National Phone Forum Participant:

If you have already taken the time to provide the National Phone Forum with your feedback we appreciate your participation and please disregard this message.

We are looking for your feedback on last week's Nationwide Phone Forum entitled "**Correspondence Examinations 'Understanding the Process and Working Together'**". Please take a moment to complete the attached evaluation. The evaluation should only take 3 minutes to complete.

Survey instructions:

You must have Microsoft Word installed on your PC to participate in the event evaluation form.

1. Open the attached evaluation.
2. The event evaluation is best viewed in print layout. To change your layout setting select 'Print Layout' from the View menu.
3. After opening the attached event evaluation you may be asked to 'enable macros' within the form. Please select 'enable macros'.
4. Once finished, save and attach your completed event evaluation to an email addressed to sbse.sl.survey.mail@irs.gov

Thank you again for your participation. If you have any issues with the event evaluation process please contact Cait DeStefano at 856-237-7828. If you have any questions for the National Phone Forum Team you can contact them directly at nationalphoneforum@irs.gov.

Note: Completion of this evaluation is NOT a requirement for participants to receive their CPE credit.

Thank you,

The National Phone Forum Event Evaluation Team

Attachment VIII: TEGE Survey Example:



DRAFT

OMB #: XXXX-XXXX

**Tax Exempt / Government Entities
Government Entities (GE)
Activity / Event Feedback Survey**

<p>The IRS is committed to delivering quality customer service. You can help in this important mission by answering the questions below. This voluntary survey takes less than three minutes to complete and your responses will be kept completely confidential.</p>	<p>Instructions Use a blue or black ink pen or No. 2 pencil only. All responses must be fully marked by filling in the bubbles.</p> <p>Correct: <input type="radio"/> Incorrect: <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/></p>
---	---

Location
Activity
Date / /

1 For each of the following questions, please indicate your level of satisfaction by choosing a number from 1 to 5, where 1 means "Very Dissatisfied" and 5 means "Very Satisfied."

	<i>Very Dissatisfied</i>	1	2	3	4	5	<i>Very Sati.</i>
Presenters' knowledge of the subject matter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Opportunity for you to ask questions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Instructions on how to get additional information or help	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Information you received met your expectations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2 Please rate your satisfaction with the OVERALL QUALITY of the activity or event

	<i>Very Dissatisfied</i>	1	2	3	4	5	<i>Very Sati.</i>
of the activity or event	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please rate your OVERALL SATISFACTION with this activity or event

- 3** How did you learn about this event? (choose all that apply)
- IRS
 - Professional/Trade Organization
 - Friend/Associate
 - Employer
 - Internet
 - Media (Newspaper, Magazine, TV, Radio, etc.)
 - Other (specify below)

- 4** Which of the following best describes you? (choose one only)
- Issuer
 - Conduit Borrower
 - Legal Counsel
 - Investor
 - Federal Agency
 - Underwriter/Financial or Market Analyst
 - External Tax Professional
 - Government Entity Manager
 - Government Entity Employee
 - Internal Attorney or Accountant
 - Other (specify)

4 Please Specify Here

5 We would appreciate any comments you may have. Please print clearly. Tell us if anything was particularly good or bad about this event, offering suggestions for improvement, or share any other thoughts:

Paperwork Reduction Act Notice
The Paperwork Reduction Act requires IRS to display an OMB Control Number on all approved information requests. About three minutes will be needed to complete this voluntary questionnaire. If you have any comments about the time estimate, or suggestions for simplifying the form, please write to:

Thank you for completing the survey.

Tax Forms Committee
Western Distribution Center
Rancho Cordova, CA 95743-0001