

Tax Practitioner Liaison Meeting

Oregon Department of Revenue - Fishbowl Meeting Room

Friday, May 22, 2009

9 a.m. – 11 a.m.

Welcome and Introductions

All

Dee asked everyone to introduce themselves and mention something they noticed from last tax season.

Introduction of new Policy & System staff:

Rod King – Tax Auditor 1 on a temporary work assignment from Salem Audit. He will be authoring forms and publications for the booklet process.

Tami Idsinga – Tax Auditor 1 on a temporary work assignment from Salem Audit. She will be authoring forms and publications for the booklet process.

Secrecy Certificates

Sheri Suppes/Steve Purkeypile

Sheri and Steve coordinated getting badges for all those who had not sent in their signed secrecy certificates ahead of time, which was a requirement for participating in the Processing Center Tour.

Processing Center Update

Erin Larsen

As of May 21st, PIT has processed the following:

And the following for Corp:

334,967 2D

5,844 2D

1,065,122 ELF

6,171 ELF

241,885 Paper

31,006 Paper

This year the Corp processing system was not available until mid April, however, we should be current with Corp by the end of this month.

Also, due to budget constraints, we did not hire seasonal workers for Mail Opening. Instead, volunteers throughout the agency came down and helped out.

This year, we finished opening mail 1 week earlier than last year.

Other areas of the Processing Center, however, brought in a few seasonal workers, but not nearly as many as last year. To make up for the shortfall, the units relied heavily on resource sharing and extended work hours.

ITU hopes to have all PIT refunds finished by the end of the month. Their seasonal workers are scheduled to work until June 5th.

Processing Center Tour

JP Jones/Jody Grilli

John Paul Jones and Jody Grilli took the group on a tour of the Processing Center.

The processing center tour ran over the time allowed so the meeting was closed with Q & A. A big thank you to OATC for providing today's coffee.

Next Meeting: June 26, 2009, 9-11 am in the fishbowl conference room, located at the Oregon Department of Revenue.