

Taxpayer Rights & the Customer Experience

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Our work is not about taxes.
It's about people.



DC Taxpayer Bill of Rights

- The right to be informed
- The right to quality service
- The right to pay no more than the right amount of tax
- The right to challenge the District's position and be heard
- The right to an independent review of a dispute
- The right to finality
- The right to privacy
- The right to confidentiality
- The right to use a representative
- The right to a fair and just tax system



What is the customer experience?

The customer experience is the sum of all interactions that a customer has with an organization over the life of the relationship with that company or with that brand.



The District of Columbia Office of Tax and Revenue | Office of the Taxpayer Advocate | 202-442-6348

www.taxpayeradvocate.dc.gov

WHEN WILL OTA INTERVENE?

Situations where many units or divisions are involved and the ability to work cross-divisionally is required for an accurate outcome

Cases where the taxpayer is presenting a unique situation which needs individualized review

Cases that have been referred by specified organizations or agencies

Cases where the taxpayer has tried to resolve a problem through the normal OTR channels but the channels have broken down

Cases where there is no other opportunity for review

To provide assistance and oversight as necessary with FOIA checks, OIC denial appeals, and tax checks

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How is the
customer experience
related to taxpayer rights?



Key Aspects of the Customer Experience

Internal Communication

External Communication

Digital Communication



Internal Communication

The Office of the Taxpayer Advocate works to facilitate a resolution in cases where the taxpayer has experienced difficulty in working with OTR, such as when:

- the taxpayer has tried to resolve a problem through the normal channels but has been unable to resolve the matter
- in cases of undue delay or unresponsiveness
- cases that present a unique situation that need individualized review
- cases where the taxpayer is experiencing imminent hardship
- cases where there is no other opportunity for review.

In addition, OTA will provide assistance and oversight as necessary to promote the Taxpayer Bill of Rights.



External Communication

The Office of the Taxpayer Advocate works to ensure that there is clear communication with taxpayers and their representatives. OTA can assist in cases where the taxpayer has experienced difficulty communicating with OTR, such as:

- The taxpayer did not receive or did not understand a notice;
- Information on the notice is unclear or incorrect;
- The taxpayer or the representative is experiencing difficulty in communicating with a specific department or individual; and/or
- Informal guidance is requested on a common error.



Digital Communication

We are committed to ensuring that all of the information we provide to the public is up-to-date, correct, and clear. Taxpayers and OTR both want to ensure that taxpayers know and understand their rights and obligations.

- MyTax
- OTR's website
- MITS batch processes
- System notices and communications

If you see something that needs to be updated or changed, OTA can ensure that the request gets to the right place.



Receiving and operationalizing feedback is critical to creating a better customer experience.



PRACTITIONER FEEDBACK SURVEY



Please take a moment to complete this survey or, to request a direct link to the survey, please send a request to taxpayeradvocate@dc.gov using the subject line **SURVEY LINK**.



How can taxpayers contact us?

- www.taxpayeradvocate.dc.gov
- (202) 442-6348
- MyTax.DC.gov
- taxpayeradvocate@dc.gov





Questions?