



**Tax Forms and Publications Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
April 8, 2020**

**Designated Federal Officer (DFO)**

- Terrie English TAP Director

**Members Present**

- |                        |                      |            |
|------------------------|----------------------|------------|
| • Laurie Brock         | Eugene, OR           | Vice Chair |
| • Patrick “Pat” Kusiak | Arlington, VA        | Member     |
| • Kenneth Lewis        | New York City, NY    | Member     |
| • Martha Lewis         | Colorado Springs, CO | Member     |
| • Joseph Magyar        | Tampa, FL            | Member     |
| • T. Renee Parker      | Brentwood, NY        | Member     |
| • Alexas Pickron       | Townsend, DE         | Member     |
| • Stephen Selden       | Oxford, MD           | Chair      |
| • Bruce Stratton       | Boise, ID            | Member     |
| • Sandy Villella       | Wildomar, CA         | Member     |

**Staff**

- Rose Babb – TAP Management Assistant
- Sheila Stevens Brown – W&I Program Analyst
- Raushauna Harris – W&I Senior Tax Analyst, (CARE Media & Publications)
- Fred N. Smith, Jr. – TAP Senior Program Analyst
- Cedric Jeans – TAP Program Manager

**Members of the Public**

N/A

**Roll Call & Approval of Minutes**

All members are present. The Chair accepted a motion from Bruce Stratton to accept the minutes from the Virtual Face to Face meeting in March. The motion was seconded by T. Renee Parker. Motion passes.

**Welcome/Announcements/Review Agenda/TAP Mission**

Jeans welcomed all and declared the call opened.

**Chair Comments**

Selden welcomed the members and proceeded with the agenda.

**National Office Report**

English welcomed all to the meeting and said the following:

- The IRS is receiving daily updates on the COVID-19 pandemic including the Stimulus package.



- Be very vigilant to scammers pretending to be government employees.
- The New National Taxpayer Advocate, Erin Collins started last week; she will have a meet and greet via teleconference with TAS staff via teleconference on April 9.
- Any new updates gathered from the Stimulus package during the teleconference with the NTA for taxpayers will be shared with the TAP panel members.
- Members are encouraged to send emails with questions they may have to English.

### **DFO Report**

Jeans shared the following:

- TAP Recruitment period has been extended until April 20, for 2021. Members are encouraged to share this recruitment effort with their neighbors and friends. Job announcement can be found on [improveirs.org](http://improveirs.org).
- News Release examples are available for members to tweak for their outreach events or for submission to member's local news outlets. Note that the new NTA, Erin Collins name should replace Nina Olson before distributing any literature to the public.
- If members are interested in conducting virtual outreach events and, would like to make presentations, the TAP Staff can assist with setting up WebEx sessions. These events can be facilitated only during business hours, Monday through Friday 8:00am – 4:30pm Eastern time. Reach out to your TAP Analyst for assistance.
- For the latest updates on COVID-19, members were asked to subscribe to [IRS.gov/COVID](http://IRS.gov/COVID).
- Business cards were ordered and will be available in a few weeks; an email will be sent out to inform members once it arrives.

### **Outreach Committee update**

Brock shared some of her outreach examples. She informed the members that she will send an email reminder to submit their outreach events by the 25<sup>th</sup> of each month. Brock also mentioned to the members that they should tweak the TAP News Release letter and then send it to radio stations, newspapers, local groups and the options for bulletin boards.

#### **Subcommittee 1: Report out**

**Issue 40664** – Sch A Instructions- The committee voted to accept the IRS response.

**Issue 36545** - Form 8941 Health Care Credit Business- The committee voted to accept the IRS response.

**Issue 42292** - Review of F1040 Instructions for TY2020- This issue will be placed on the Joint Committee Agenda for April 23 for further discussion.

#### **Subcommittee 2: Report out**

**Issue 37336** - Form 2555 Foreign Earned Income- The members will work on some reconciliation and a possible rebuttal to the IRS.



**Issue 40751/36654** - Form 1040/1040 SR - The members agreed to accept the IRS responses ID 1639 - 1648 to this issue. ID 1649 will become a new issue (42295) and elevated to the JC.

**Issue 42292** - Review of F1040 Instructions for TY2020- Some questions were raised on one item in the second half of this issue. The committee Chair will approve this item moving forward, in draft form, outside the regular JC process. This will be retroactively approved by the full committee at the May meeting.

### **Screening Committee**

There is nothing new to report on screening issues this month.

### **Action Items**

- News Release is available in TAP Space for your convenience to edit and distribute to radio stations, newspapers and groups.
- Activity Reports are due on the 25<sup>th</sup> day of each month.

### **Closing**

Jeans and Selden thanked the members for joining the call and Jeans declared the meeting closed.

**The next monthly teleconference will be on May 13, 2020 at 12:00 p.m. ET.**

**These minutes have been approved and certified by the committee chairperson.**