



**Tax Forms and Publications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
August 12, 2020**

Designated Federal Officer (DFO)

- Cedric Jeans TAP East Program Manager

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 |
| • Robert Moretti | Great Falls, MT | TAP Vice Chair |
| • 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

- | | |
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| • Kevin Brown | TAP Management Assistant |
| • Conchata Holloway | TAP Program Analyst |
| • Antonia “Toni” Keeling | TAP Program Analyst |
| • Antoinette “Toni” Ross | TAP Program Analyst |
| • Fred N. Smith, Jr. | TAP Program Analyst |
| • Sheila Balkaran | W&I Tax Analyst, CARE Media & Publications |
| • Michael Odom | W&I Program Analyst |

Public Participants

None

Welcome/Announcements/Review Agenda/TAP Mission

Jeans welcomed all and declared the call opened. Jeans noted a change to the agenda, Terrie English is out today, and he will fill in for her.

Chair Comments

Selden welcomed and thanked everyone for attending the call. Selden reminded the committee that we will be working on this committee’s part of the TAP annual report.

National Office Report/DFO Report

Jeans reminded the committee that the annual report goes through the National Taxpayer Advocate and the IRS Commissioner. This makes this a very important part of the committee’s work for the year. Jeans reported the tax forums being virtual with TAP



having a virtual booth. Jeans asked members to encourage any tax professionals they may know to attend this forum. There will be an All TAP virtual meeting Monday, August 17, 2020, at 1:00pm. The executive and deputy executive directors for Communications, Stakeholder Liaison & Online Services will be reviewing the IRS roadmap. All members are encouraged to join this call. Jeans encouraged members to sign up for E-News subscriptions to receive tax news that may be of interest to the committee members from www.irs.gov.

Approval of July 8, 2020 Minutes

Page 2 outreach committee update title, “Update” is capitalized. Line two “out” was removed from before “outreach efforts.” Brock motioned Stratton seconded.

Action: Minutes approved as amended

Outreach Committee update

Brock reported 70 percent submission rate of activity reports at this time. Brock reminded the committee to include work done before and after meetings on their activity reports. Ask Brock if you have any questions. Tax Forum chat sessions have gone well.

M. Lewis reported joining some of her local group meetings via Zoom, and she will continue to do so. Brock reported that the Outreach Toolkit file project was completed and is available on www.tapspace.org for all members. K. Lewis will complete the August newsletter article for the committee. Brock asked members to submit any reports that member want to add to the monthly newsletter.

Subcommittee 1

Kusiak reported:

Issue 41905 - Instructions Regarding Tax Tables Review- Drop Suggested

Issue 42148 - Suggestion for Worksheet Update

F1040 changed from P1040. Smith received completed updates from Kusiak via email and updated the form via WebEx. The addition was a cautionary box dealing with non-resident aliens.

Issue 42173 - Form 2210 Instructions Line 8 Calculation Omission for 1040

There was a missing line for the 2019 year making this form workable for the 2019 year. Kusiak motioned, M. Lewis seconded.

Actions: Issue 41905 Dropped;

Issues 42148 and 42173 approved, as amended, for elevation to the JC

Subcommittee 2

Stratton reported:

Issue 42047 - Reporting Dividends on Form 10401040-SR and Schedule B

The verbiage of qualified dividends updated to make the form easier to understand by taxpayers.

Issue 42066 – Reporting Social Security Benefits



The verbiage intends to simplify the instructions and easier for taxpayers to complete this form.

Issue 41886 - Publication 972 Error

Adjusted Gross Income (AGI) changed to Modified Adjusted Gross Income (MAGI) to correct this error.

Kusiak reminded the committee that the changes in these documents should appear underlined, while the deletions should appear with the ~~striketrough~~ option to follow proper style guide rules for such changes. Stratton motioned; Kusiak seconded.

Action: Issues approved, as amended, for elevation to the JC

Screening Committee

- Assigning Issue 42161 to Subcommittee 1
- Eight new issues to be reviewed next week

Annual Report Discussion

Selden advised members to review last year's annual report to get an idea of how the report for this year should be done. Kusiak and Stratton will assign blurbs for each subcommittee member by the end of this month. Smith will send a list of all referrals from this year to Kusiak and Stratton to start this process. The details of the format are being worked currently.

Action Items

- Drop Issue 41905.
- Send Issues 42148, 42173, 42047, 42066 and 41886 to the JC pending review.
- Fred will send inventory report to Screening Committee on Wednesday.
- Fred will send Kusiak and Stratton a list of subcommittee Issues from this year
- Kusiak and Stratton will assign summaries to members for the Annual Report.
- Smith, Selden, Kusiak and Stratton will work on Annual Report format.

Closing

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

The next monthly teleconference will be on September 9, 2020 at 12 p.m. ET.

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