



**Tax Forms and Publications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
July 8, 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 |
| • Alexas Pickron | Townsend, DE | Member |
| • Stephen Selden | Oxford, MD | Chair |
| • Bruce Stratton | Boise, ID | Member |
| • Sandy Villella | Wildomar, CA | Member |

Members Absent

- | | | |
|-------------------|---------------|--------|
| • T. Renee Parker | Brentwood, NY | Member |
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Staff

- | | |
|--------------------------|--|
| • Kevin Brown | TAP Management Assistant |
| • Terrie English | TAP Director |
| • Conchata Holloway | TAP Program Analyst |
| • Antonia “Toni” Keeling | TAP Program Analyst |
| • Matthew O’Sullivan | 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) |
| • Tamikio Bohler | W&I Program Analyst (Absent) |

Public Participants

None

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. Selden thanked the committee moving seven referrals to the Joint Committee (JC) last meeting. Selden encouraged the committee to continue to send in their outreach reports.



National Office Report

English welcomed all to the meeting and said the following:

The tax forums will occur from July 21, 2020 through August 20, 2020. Fred Smith will be the analyst for this. TAP will have its own virtual booth along with a TAP video and the Form 14388 *Taxpayer Advocacy Panel (TAP) Outreach*. The days will be Tuesday, Wednesday and Thursday. English is asking for interested members to please respond as quickly as possible if you want to join these forums by July 9, 2020 as the preparations are being made now.

The next JC meeting is July 23, 2020. The Taxpayer First Act is asking the JC to be a part of a survey they are conducting, and members will be solicited for participation.

DFO Report

Jeans shared the following:

The National Taxpayer Advocate (NTA) released the June semiannual objective report to Congress and mentioned TAP several times in this report. The pages are 72 and 223. Jeans reminded the committee that July 15, 2020 is the tax filing deadline.

Approval of Minutes

Page two: The last sentence was removed from the page. The fourth bullet had the word "toolkit" added to show "outreach toolkit material"

Page three: Under Subcommittee 1 a change was made to the phrase: "Action: Issue elevated to JC for consideration" The word "issue" was changed to "issues."

The June 10, 2020 minutes approved as amended for posting to www.improveirs.org. Stratton motioned; Brock seconded.

Outreach Committee Update

Brock stated the following:

Moretti would like members to share outreach events or ideas that members have had success with. Free File is being pushed out through outreach efforts for taxpayers who qualify for it. There are great articles in the newsletter that members may want to read. Brock reported getting most of the outreach reports but waiting on a few still. Brock solicited volunteers for the August newsletter article.

IRS Response

Issue 40047- The IRS adopted and will implement this by January of 2022.

Subcommittee 1

Report out- Kusiak

Issue 43163 - Self-Employment Tax - F1040 SCH SE

(already submitted to IRS as DRAFT and needs committee approval) Selden motioned; Kusiak seconded.



Action: Issue approved for formal elevation to the JC

Issue 42362 - IRS Form 1040 Instructions, Pages 18 and 19

Kusiak motioned; Stratton seconded.

Action: issue approved for elevation to the JC

Issue 41913 - 2019 1040-SR – Standard Deduction Chart Needs Correction

Kusiak motioned; Brock seconded.

Action: Issue approved for elevation to the JC

Issue 42267 - IRS 1040 Instructions and Online Filing of Forms

Text added to clarify how this is supposed to work. Kusiak motioned; M. Lewis seconded.

Action: Issue approved for elevation to the JC

Issue 42150 - Line 4 of 1040-SR

There is no issue here, the topic was dropped. Kusiak motioned; Stratton seconded

Action: Issue dropped

Issue 42173 - Critical error in 2019 Form 2210 Instructions (update)

This issue is still being worked.

Subcommittee 2: Report out

Issue 41945 - Mailing of Forms 1099 and 1096

Sentence added to say mail these documents flat, not to be folded. Stratton motioned; Selden seconded.

Action: Issue approved for elevation to the JC

Screening Committee

- Assigning Issues 41905 and 42148 to Subcommittee 1
- Assigning Issues 42047, 42066 and 41886 to Subcommittee 2

Action Items

1. Smith will prepare the newly assigned issues for each subcommittee

Closing

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

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

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