



**Tax Forms and Publications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
June 10, 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 (Absent) | Member |
| • Alexas Pickron | Townsend, DE | Member |
| • Stephen Selden | Oxford, MD | Chair |
| • Bruce Stratton | Boise, ID | Member |
| • Sandy Villella | Wildomar, CA | Member |

Staff

- Sheila Andrews Deputy Executive Director, Communications Stakeholder Liaison and Online Services (CSO)
- Kevin Brown TAP Management Assistant
- Terrie English TAP Director
- Tamikio Bohler W&I Program Analyst (Absent)
- Raushauna Harris W&I Senior Tax Analyst, (CARE Media & Publications)
- Antonia “Toni” Keeling TAP Program Analyst
- Antoinette “Toni” Ross TAP Program Analyst
- Fred N. Smith, Jr. TAP Program Analyst

Members of the Public

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 for all their work and the hours dedicated to TAP. 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 COVID-19 pandemic has affected almost every business across the nation so be mindful as they start opening.
- Business cards are delayed until the Washington D.C. office opens.
- Tax Forums will be done virtually this year. Fred Smith is the analyst for this project.
- June 18, 2020 All TAP Virtual Meeting. National Taxpayer Advocate (NTA) will attend this meeting.
- June 25, 2020 JC Monthly Meeting. All members are welcomed to attend. English encouraged new members to attend these meetings to determine if they would like to be in leadership next year.

DFO Report

Jeans shared the following:

- Rose Babb has left on a temporary detail.
- The option for electronic filing is on www.tapspace.org for members to review.

Approval of Minutes

The members voted to approve the May 3, 2020 minutes for posting to www.improveirs.org. Kusiak motioned, M. Lewis seconded.

Outreach Committee update

Brock stated the following:

- Requested a volunteer for the newsletter article. K. Lewis June, Pickron July. Reminders will be sent by Brock.
- A reminder will be sent out beginning June 20, 2020 for the outreach reports that are due on the twenty-fifth day of each month. Blank forms and assistance on completing them are available to members who need it.
- Brock acknowledged the difficulty to do outreach during the outreach. Brock will review press releases to share with members. Brock encouraged members to reach out to their Local Taxpayer Advocate (LTA).
- The Outreach Committee is working on updating the Outreach Toolkit material in the TAP Space database. An email will be sent to TAP members with a link to access the new updated material.
- The TFP needs a member to commit each month to writing a paragraph for the TAP Newsletter monthly.

Subcommittee 1

Issue 42823- 1099R and Issue 42824 –Kusiak briefly described the recommendations for the Form 1099R. Add a box for qualified charitable distributions; eliminate the 1099 red form; and to make it a single readable document

Issue 42824 has significant amount of recommendations to Publication 15T to improve the clarity of these forms, so it is easier to complete by taxpayers.

Issue 41750 Form 2210S- Discussed why it is needed to help farmers and fisherman to request a waiver for farmers and fishermen. Kusiak motioned, Stratton seconded to be

Action: Issues elevated to JC for consideration.

Subcommittee 2

Issue 42825- Schedule 1 - Stratton discussed the suggestions for these forms to provide clarity and make them easier to complete Schedule 1 for the Form 1040. Larger font; additional income items instructions made similar to Schedule 2 for clarity; use more commonly used acronyms; add make instructions easier to understand for taxpayers.

Issue 42826 - Schedule 2- Increase the font

Issue 42827 - Schedule 3- Increase the font and Add additional lines

Issue 41996 – Printable IRS Forms

1099, 1096 and W-2. Make them printable and fillable taxpayer convenience.

Stratton motioned, Kusiak seconded.

Action: Issues elevated to JC

Issue 41991 – Form W9 (dropped)

Stratton motioned, Kusiak.

Action: Issue dropped.

Screening Committee

Assigning to Subcommittee 1

Issue 42362, 42267, 41913 and 42150. Additionally, Issue 42173

Assigning to Subcommittee 2

Issue 42011 and 41976. Additionally, Issue 41945

40832-Dropped by screening committee

1040 Schedule SE- quick turnaround project.

The subcommittee responses will be made by June 18, 2020. Kusiak will make changes and send them to Stratton and Selden before it is due on June 23, 2020 to finalize the committee response.

Action Items

- Smith will send the 1040 Schedule SE with an issue number today.
- Project proposals will go out tomorrow by Smith.
- Quality Review for the approved referrals before they go to the JC.
- K. Lewis, A. Pickron newsletter for June and July.

Closing

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

The next monthly teleconference will be on July 8, 2020 at 12:00 p.m. ET.

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