



**Tax Forms and Publications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
May 13, 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

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

Public Participants

N/A

Approval of Minutes

The members voted to approve the April 9th minutes for posting to improveirs.org.

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 providing daily updates on the COVID-19 pandemic and the Stimulus package. Communication Stakeholder Organization, CSO has teleconference updates twice weekly.
- Taxpayers can get the latest information by using the IRS.gov link which is being updated frequently.
- TAP Staff will provide the members with COVID -19 information which will enable them to provide accurate information when conducting outreach activities with the public.
- The IRS staff at some essential locations are operating as a skeleton staff due to an employee that contracted COVID 19.
- At the TAP members 1st Quarterly meeting scheduled for June, a SME will be invited to address the members and entertain questions they may have on the COVID-19 and the Stimulus package as it relates to taxpayers.

DFO Report

Jeans shared the following:

- The TAP staff has started the process of contacting applicants for interviews for the new year 2021. The ranking process has been completed.
- Members were told expect an email requesting their participation in conducting the interview process. If members can assist, they should respond to the committee analyst; their schedules will be accommodated.
- In order to observe the FACA rules of Advisory Group Meetings, when members are conducting virtual outreach activities, they must copy the TAP Email box.
- TAP will have its 1st Quarterly meeting in June; details will follow for the date and time.

Conchata Holloway, a new TAP Program Analyst introduced herself to the members; Holloway will be assisting Martinez with the committee's work. Members were informed that they will receive emails addressed to them from Holloway as well.

Outreach Committee update

Brock stated the following:

- A reminder will be sent out beginning May 20th for the outreach reports that are due on the 25th day of each month. Blank forms are available for those new members in addition to any assistance they may need to complete the forms.
- The Outreach Committee is working on updating the outreach 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 at paragraph for the TAP Newsletter monthly.

Brock also mentioned that the Tax Forms Publication need to choose a member to represent the TFP Committee at the Internal Communications Committee, ICC Monthly Committee meetings.

Subcommittee 1: Report Out

Issue 42292 - Review of F1040 Instructions for TY2020- The committee voted to have this issue placed on the Joint Committee Agenda for May 28 for further discussion.

Issue 42823- 1099R and Issue 42824 – Chair Kusiak had a brief discussion on these issues; the subcommittee will continue working these issues.

Subcommittee 2: Report Out

Issue 42825- Schedule 1, 2 and 3 -Smith will also include Stratton’s comments into this issue as well.

Issue 42826 - Schedule 2

Issue 42827 - Schedule 3

This subcommittee is continuing to work on both Schedule 2 and 3.

Screening Committee

41802 and **Issue 41750** is assigned to **Subcommittee 1** to review and possibly develop.

41996 and **Issue 41991** is assigned to **Subcommittee 2** to review and possibly develop.

Action Items

- Smith will send out the names of LTAs and post to TAP Space
- Smith will also incorporate Bruce’s comments on Issues 42825, 42826 and 42827
- Selden will be the representative for TFP attending all ICC meetings monthly.

Closing

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

The next monthly teleconference will be on June 10, 2020 at 12:00 p.m. ET.