



**Tax Forms & Publications Committee, (TFP)  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Wednesday, October 14, 2020**

**Designated Federal Officer (DFO)**

- Fred Smith 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 "Bob" Moretti | Great Falls, MT       | TAP Vice Chair |
| • T. Renee Parker      | Brentwood, NY(Absent) | Member         |
| • Alexas Pickron       | Townsend, DE (Absent) | Member         |
| • Stephen Selden       | Oxford, MD            | Chair          |
| • Bruce Stratton       | Boise, ID             | Member         |
| • Sandy Villella       | Wildomar, CA          | Member         |

**Staff**

- |                          |  |
|--------------------------|--|
| • Kevin Brown            | TAP Management Assistant                   |
| • Conchata Holloway      | TAP Program Analyst                        |
| • Antoinette "Toni" Ross | TAP Program Analyst                        |
| • Fred N. Smith, Jr.     | TAP Program Analyst                        |
| • Dale Hawkins           | Wage and Investments (W&I) Program Analyst |
| • Leslie Henley          | W&I Program Analyst                        |
| • Cynthia "Cindy" Jones  | W&I Tax Supervisor                         |
| • Michael "Mike" Odom    | W&I Program Analyst                        |

**Public Participants**

None

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

Smith welcomed all and declared the call opened at 12:00pm ET. Smith noted a change to the agenda, Terrie English and Cedric Jeans are out today, and he will fill in for them.

**Chair Comments**

Selden welcomed and thanked everyone for attending the call.

**National Office Report/DFO Report**

Smith reminded the committee that tomorrow is the filing deadline for anyone that asked for an extension and needs to remain in compliance. Smith reminded the committee to

pass on information about the Economic Impact Payments (EIP), which was sent out earlier, and taxpayers should register for this by November 21, 2020.

### **Approval of September 9, 2020 Minutes**

Minutes approved with minor spelling corrections. Brock motioned; Magyar seconded.

**Action:** Minutes approved as amended

### **Outreach Committee update**

Brock suggested members ask Moretti if they need help with more outreach hours. Brock reported working on a new member checklist. Brock thanked Vilella for writing the September newsletter and reminded the committee that Magyar will write the one for October and Parker will write the newsletter for November.

### **Subcommittee 1**

Kusiak reported:

**42823 to be rebutted, rebuttal in progress-** The committee decided to accept the response for ID 1820 but will be rebutting ID 1822. This rebuttal may be done by the end of this week.

### **43731- Form 1310 - Person Claiming Refund Due to Deceased Taxpayer**

Kusiak motioned; M. Lewis seconded.

**Actions:** Issue elevated to the Joint Committee (JC) and sent back to IRS directly

### **Subcommittee 2**

Stratton reported:

**Issue 43449 – 2019 1099-DIV** - This issue still being worked, and we are awaiting a response from the Attorney Advisors (AA) office to see if this is a legislative issue or not.

**Action:** Issue moved back to the subcommittee

### **Screening Committee**

#### **Issue 43628 Form 13614-C Revision Suggestions**

Assigned to subcommittee 1, Smith will send the information out today.

### **IRS Responses (Accept or Rebut)**

#### **Partially Accepted:**

40664- Accepted

36545- Accepted

41382- Accepted

41505- Accepted

41945- Accepted

42825- Accepted with additional response due on 12/31/2020

43163- Accepted

**Non-Adopts:**

40751 Accepted  
40103 Accepted  
37336 **Awaiting a clear response**  
41347 Accepted  
41402 Accepted  
41996 Accepted  
42267 Accepted  
42292 **Awaiting clarity from the IRS**  
42823 Rebutted

**Fully Accepted:**

40876  
41913  
42362  
42826  
42827  
40047

**Action Items**

- M. Lewis will draft rebuttal for issue 42823, ID 1822, by the end of next week.
- Smith and Jeans will follow up with AA on issue 43449.
- Smith will send project proposal for issue 43628 to subcommittee 1.
- Issue 43731 elevated to JC for consideration.

**Closing**

Selden reminded the committee how important the activity reports are for the committee and spoke about completing the Annual Report for this committee. Selden also thanked the committee for all their work done today. Smith closed the meeting at 1:08pm ET.

**The next monthly teleconference will be on November 10, 2020 at 11:00am EST.**

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