



**Tax Forms & Publications Committee, (TFP)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Wednesday, November 10, 2020**

Designated Federal Officer (DFO)

- Cedric Jeans TAP East Chief

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 |
| • T. Renee Parker | Brentwood, NY | Member |
| • Stephen Selden | Oxford, MD | Chair |
| • Bruce Stratton | Boise, ID | Member |
| • Sandy Villella | Wildomar, CA(Absent) | Member |
| • Philip Kleiber | National Chair | |

Staff

- | | |
|--------------------------|--|
| • Kevin Brown | TAP Management Assistant |
| • Terrie English | TAP Director |
| • 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 |
| • Cynthia “Cindy” Jones | W&I Tax Supervisor |
| • Michael “Mike” Odom | W&I Program Analyst |
| • Dave Thompson | CSO Program Analyst |
| • Raushauna Harris | W&I Tax Analyst |

Public Participants

None

Welcome/Announcements/Review Agenda/TAP Mission

Jeans welcomed all and declared the call opened at 12:00pm ET.

Chair Comments

Selden welcomed and thanked everyone for attending the call.

National Office Report/DFO Report

Terrie English thanked the committee for all of their work this year and congratulated the retiring members and applauded everyone's work. English welcomed the returning members for another exciting TAP year next year. Jeans reminded the members to complete the end of year survey when it is sent out shortly. Jeans encouraged all members to turn in their last activity reports. Jeans encouraged returning members to continue to do outreach. Jeans reminded everyone to thank veterans since tomorrow is Veteran's Day. Jeans mentioned the Meet the Candidates meeting today at 3pm ET. Kleiber thanked the committee for the incredible amount of production that came out this year and hopes we get back to live meetings soon. Best Wishes for next year.

Approval of October 14, 2020 Minutes

Stratton motioned; Kusiak seconded.

Action: Minutes approved as submitted

Outreach Committee update

Brock reported 70 percent of outreach reports received and encouraged members to turn outstanding reports. Brock reported using a PowerPoint on a call for outreach this month. Brock reported the mentorship committee developing for next year. Brock thanked everyone for helping submit newsletter reports for this year.

Subcommittee 1

Kusiak reported:

Issue 42823 - 1099-R Review (rebuttal submitted; no action required today.)

Issue 43628 - Form 13614-C Revision (vote)

This recommendation is to move the email address to part one from page three to show it sooner since email is more of a way that many taxpayers communicate. This referral includes all tax software programs. Kusiak motioned; Stratton seconded.

Actions: Issue elevated to the Joint Committee (JC)

Issue 37155 - Qualified Dividend and Capital Gains Tax Worksheet- Issue dropped

Subcommittee 2

Stratton reported:

Issue 43449 – 2019 1099-DIV- Issue placed into the parking lot.

Issue 39879 – Form 2848 Designation of Partnership Representative (vote)

The recommendation is to remove the part of the designation of partnership off this form to avoid confusion. Kusiak motioned; Stratton seconded.

Actions: Issue elevated to the JC for consideration

Screening Committee

Smith reported the remaining items will be addressed next year.

IRS Responses (Accept or Rebut)

42066- Adopted by IRS. No action required.

42824- Partially Adopted. Brock motioned; M. Lewis seconded.

Action: Response accepted

Non-Adopts:

42148- Issue will be rebutted. M. Lewis will write this up.

42161- M. Lewis motioned; Kusiak seconded.

Action: Response Accepted

42047- Parker motioned; Stratton seconded.

Action: Dropped

Action Items

- Rebut Issue 42148
- Issue 43628 Elevated to IRS after Quality Review (QR)
- Issue 39879 Elevated to IRS after QR
- 42066 adopted
- Responses to 42824; 42161; and 42047 Accepted

Closing

Selden said it has been gratifying to work with this committee and thanked everyone for all of their effort. Brock thanked Selden and everyone on the committee for their effort this year. Smith reported it being a great pleasure working with the committee and acknowledged how well they did with seven new members and still being so effective. Reminded the committee of the graduation ceremony next Friday for retiring members. Jeans thanked everyone for their hard work this year and reminded everyone to delete remaining calendar reminders. Jeans closed the meeting at 11:51pm ET.

The next monthly meeting TBD.

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