



**Tax Forms & Publications Committee, (TFP)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Wednesday, September 9, 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 | Member |
| • Alexas Pickron | Townsend, DE | Member |
| • Stephen Selden | Oxford, MD | Chair |
| • Bruce Stratton | Boise, ID | Member |
| • Sandy Vilella | 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
- Raushauna Harris W&I Senior Tax Analyst, (CARE Media & Publications)

Public Participants

None

Welcome/Announcements/Review Agenda/TAP Mission

Jeans welcomed all and declared the call opened. Jeans noted a change to the agenda, Terrie English is out today, and he will fill in for her.

Chair Comments

Selden welcomed and thanked everyone for attending the call. Selden reminded the committee that we will be working on this committee’s part of the TAP annual report.

National Office Report/DFO Report

Jeans reported that we are currently updating the Federal Advisory Committee Act (FACA) database. This includes program information such as recommendations, finances for the program and meeting information for TAP.

TAP will be working with W&I and Small Business Self Employed for new projects next year. We are also accepting any new project ideas from the committee as well. Jeans said that in preparation for the new member orientation we are looking for committee members to help with this process to improve these presentations. Let Smith know if you want to help.

Jeans reminded the committee that the TAP National Chair and Vice-Chair elections are coming up for next year's leadership. Jeans explained the nominations process and indicated the Kleiber and Moretti can give members an idea of what TAP leadership does. Moretti gave the committee some details about this position.

Jeans reminded the committee to reflect on the upcoming September 11, 2001 day of remembrance coming up this Friday.

Approval of August 12, 2020 Minutes

Chair Comments section: "...we will we..." changed to "...we will be..."

Outreach Report section: first line changed from "outreach reports" to "activity reports."

Meeting start time and ending times recommended moving forward.

Action: Minutes approved as amended

Outreach Committee update

Brock reported outreach and activity report tools are available on www.tapspace.org.

Brock reminded members to get them out and ask her if any member has any questions. Brock will be attending a stakeholder liaison call next month.

Brock reviewed the Outreach Toolkit on www.tapspace.org for the committee to use while conducting outreach and explained what these tools can be used for. Brock solicited members to complete newsletter reports for the committee:

- Villella will complete the September
- Magyar will complete the October
- Parker will complete November

Subcommittee 1

Kusiak reported:

Issue 42161 – Estimated Tax Worksheet (vote)

The recommendation is to add worksheets to this form to make it easier for taxpayers to complete the Form 1040-ES instead of being delayed waiting on the Publication 505.

Kusiak motioned: Stratton seconded

Actions: Issue elevated to the Joint Committee (JC)

Subcommittee 2

Stratton reported:

Issue 43449 – 2019 1099-DIV (discuss)

Qualified business income deduction being included on Form 1099 instead of requiring Forms 8995 or 8995A if the amount is low enough. Stratton inquired with the committee

to see if there are any additional recommendations. Kusiak suggested this may need to come from the counsel side instead of the forms department.

Action: Issue moved back to the subcommittee to do more research.

Annual Report Discussion

Selden mentioned that responsibility for the preparation of "blurbs" has been assigned to the members and all "blurbs" should be completed and returned to him by September 22, 2020.

IRS Responses (Accept or Rebut)

42823- Committee prepared to rebut regarding the Qualified Charitable Donations (QCD)s, processing codes and font size.

42292- Committee would like the IRS to consider withdraw this referral if they do not want to accept our recommendations. The staff will reach out to the IRS for clarity.

41996- Committee accepts the IRS response.

Action Items

- Rebut Issue 42823.
- Reach out to IRS about Issue 42292.
- Activity reports due on the twenty-fifth of each month.
- Newsletter articles: September-Villella, October-Magyar November-Parker.
- Inventory report for screening committee meeting.
- Issue 42161 elevated to JC after Quality Review.

Closing

Selden reminded the committee how important the activity reports are for the committee and encouraged everyone to turn their reports in. Jeans thanked the members for joining the call and declared the meeting closed at approximately 1:00pm ET.

The next monthly teleconference will be on October 14, 2020 at 12 Noon EST.

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