



**Tax Forms & Publications Committee, (TFP)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, April 8, 2021**

Designated Federal Officer (DFO)

- Cedric Jeans TAP East Chief

Members Present

- | | | |
|-------------------------|----------------------|------------|
| • Tor Daley | Anchorage, AK | Member |
| • Kristen Gentile-White | Gilbert, AZ | Member |
| • Martha Lewis | Colorado Springs, CO | Chair |
| • Joseph Magyar | Tampa, FL | Vice-Chair |
| • Cynthia (CJ) Mills | Glenside, PA | Member |
| • Jon Ramirez | Wichita, KS | Member |
| • Christine Scott | Kapaa, HI | Member |
| • James Usseglio | Hollis, NH | Member |
| • Sandy Vilella | Wildomar, CA | Member |
| • Lucinda Weigel | Vienna, VA | Member |

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 |
| • Michael “Mike” Odom | Wage and Investments (W&I) Program Analyst |
| • Dale Hawkins | Tax Analyst W&I |

Public Participants

None

Welcome/Announcements/Comments/Acknowledgement of Citizens

Cedric Jeans welcomed all and declared the call opened at 2:00pm ET. Lewis thanked everyone for joining the meeting and reminded the members to reach out to TAP leadership or staff if they need help with anything.

National Office Report

English reminded the committee that the recruitment season is open through May 14, 2021 and asked the members to get the word out.

DFO Report

Jeans reported technical difficulties with the announcement on www.usajob.gov. They are working with IT to fix this now. A banner is on www.improveirs.org explaining this issue. The Annual Report is printed and will be mailed to member's homes directly in the next few weeks.

Approval of March 11, 2021 Minutes

Mills corrected the word "rooster" to "roster" on Page 2. Daley motioned; Weigel seconded.

Action: Minutes approved as amended

Outreach Report

Magyar reminded members to submit the activity reports and asked members to ask for help if it is needed. Magyar emailed documents to help with outreach and encourage members to work outreach to look for issues from taxpayers. Reach out to your Local Taxpayer Advocate (LTA) if you have not already done so. IRS tax forums will be virtual starting on July 20, 2021. Volunteers are needed to staff this expo for TAP.

Subcommittee 1 Report

Magyar reported:

Issue 41750 - Form 2210-F (Rebuttal) **Will go to IRS now**

Issue 43820 - Donation deduction

Weigel motioned; Daley seconded.

Action: Issue elevated to Joint Committee (JC)

Issue 43449 - Form 1099 DIV (update)

Issue is still being worked, may be ready next month.

Subcommittee 2 Report

Lewis Reported:

Issue 43731 - Form 1310 - Person Claiming Refund Due to Deceased

Magyar motioned; Daley seconded.

Action: Issue elevated to JC

Issue 43953 - Publication 502-Medical Expenses

Weigel motioned; Mills seconded.

Action: Issue elevated to JC

Issue 44396 - Schedule LEP Notice 1445

CJ Mills suggested a word change to page two on the privacy issue of the referral.

Magyar motioned; Daley seconded.

Action: Issue elevated to JC as amended

Issue 43939 - IRS Form 1040-Line 2a (update)

This issue has been placed in the Parking Lot pending an update from the submitter.

Screening Committee Report

Smith reported Issue 43805 going to subcommittee 2 Paycheck Protection Program (PPP) loan forgiveness for clearer guidance. The next meeting is on April 27, 2021 at 2pm ET. Smith reported next month will include IRS responses for the committee to consider. Scott thanked Magyar for writing the report for the newsletter and solicited volunteers for the next newsletter report. Scott will write the report for this month.

Action Items

- Smith will submit the approved minutes for posting.
- Issue 41750 Rebuttal going to IRS
- Issue 43820 to JC Pending Quality Review (QR)
- Issue 43731 to JC Pending QR
- Issue 43953 to JC Pending QR
- Issue 44396 to JC Pending QR

Committee Chair and Vice Chair Closing Comments

Lewis is looking forward to addressing the IRS response during next month's meeting. Lewis and Magyar thanked everyone for all their efforts for this TAP year.

Closing

Jeans thanked everyone for joining the call and closed the meeting at 2:47pm ET.

**The next monthly meeting
May 13, 2021 at 2:00pm ET.**

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