



**Tax Forms & Publications Committee, (TFP)  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Thursday, May 13, 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 (Absent)  | Member     |
| • Christine Scott       | Kapaa, HI             | Member     |
| • James Usseglio        | Hollis, NH            | Member     |
| • Sandy Vilella         | Wildomar, CA (Absent) | Member     |
| • Lucinda Weigel        | Vienna, VA            | Member     |

**Staff**

- |                          |  |
|--------------------------|--|
| • Kevin Brown            | TAP Management Assistant                   |
| • Terrie English         | TAP Director                               |
| • Robert Rosalia         | 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 opened the meeting at 2:00pm ET and welcomed everyone to the call.

**National Office Report**

Terrie English welcomed everyone to the call and reported:

- File your returns by May 17, 2021.
- Joint Committee meeting is May 27, 2021 1:30pm.
- All TAP Quarterly meeting will be June 17, 2021 via Zoom 1:00pm ET.

- Focus group for underserved Native Americans, you are invited. May 20, 2021 at 12:00pm ET.
- There is a request for panel members who serve or have served in the military for a focus group. Contact your analyst if you are interested in participating. No date and time has been announced.
- Recruitment season has been extended to June 1, 2021.
- Tax Forum preparation has started, volunteers are being solicited. Notify Smith in advance to avoid missing this opportunity.
- Badges were sent out, contact your analyst if you have not received yours.
- Business cards are going out, but there were delays with half of the list.

### **DFO Report**

IRS is sending news releases about tax changes that may impact some of our projects. Go to [www.irs.gov](http://www.irs.gov) and subscribe to receive them and stay informed.

### **Approval of April 8, 2021 Minutes**

Weigel motioned; Daly seconded.

**Action:** April minutes approved as submitted.

### **Outreach Report**

- Magyar reported forwarding a recruitment video this month.
- Contact your Local Taxpayer Advocate (LTA).
- Smith sent solicitation for the virtual tax forums.
- The activity reports are due on the 25 of the month.

### **Internal Communications Committee (ICC) Update**

Scott reported the ICC reaching out for feedback on [www.tapspace.org](http://www.tapspace.org) manual from entire TAP to enable the ICC to move forward.

### **Subcommittee 1 Report**

**Magyar reported:**

**Issue 43449** - Form 1099 DIV

Weigel motioned; Scott seconded.

**Action:** Issue elevated to JC for consideration

### **Subcommittee 2 Report**

**Lewis Reported:**

**Issue 43939** - IRS Form 1040-Line 2a- **Dropped**

**Issue 43805** - PPP Loan Forms Suggestion- **Parking Lot**

**Issue 49511** - PPP Loan Forgiveness Creates Ambiguity on Schedule B

Scott motioned; Magyar seconded.

**Action:** Issue elevated to JC for consideration

### **IRS Responses:**

**Issue 42148** - Confusing (incorrect?) instruction for HOH- Magyar motioned; Daley seconded. **Response Accepted**

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

**Issue 39879** - Partnership Representative and Form 2848- Daly motioned; Magyar seconded. **Response Accepted**

**Issue 42173** - Critical error in 2019 Form 2210 Instructions- **Adopted**

**Issue 42292** - TY 2020 F1040 Instructions Review- Scott motioned; Magyar seconded. **Response Accepted.**

**Issue 42823** - 1099-R Review- Final Response Accepted, a note will be placed in Annual Report.

### **Screening Committee Report**

**Issue 48321** - Section 218 Agreement SSA- Sub. 2

**Issue 48358** - IRS Form or Publication- Sub. 2

**Issue 48369** - Schedule K Forms- Sub. 1

**Issue 48410** - Form 1099- Sub. 2

**Issue 48424** - Initials (AMT) in the instructions- Sub. 1

**Issue 48596** - Form 1040 SR, line 38 "Estimated Tax Penalty- Sub. 1

### **Action Items**

- Send Issue 43449 to JC after Quality Review (QR).
- Send Issue 49511 to JC after QR.
- Smith will submit the approved minutes for posting.
- Issue 42823 a note will be added to the Annual Report.
- Committee will review [www.tapspace.org](http://www.tapspace.org) manual for ICC.

### **Committee Chair and Vice Chair Closing Comments**

Lewis thanked everyone for being on the call and thanked the committee for all their work in both subcommittees. Lewis thanked everyone including the staff for all the time on this committee. Magyar concurred with Lewis.

### **Closing**

Jeans thanked everyone for joining the call and closed the meeting at 2:44pm ET.

**The next monthly meeting  
June 10, 2021 at 2:00pm ET.**

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