



**Tax Forms & Publications Committee, (TFP)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, June 10, 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 |
| • Lucinda Weigel | Vienna, VA | Member |

Staff

- | | |
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| • Kevin Brown | TAP Management Assistant |
| • Terrie English | TAP Director |
| • Gilbert Martinez | 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 |
| • Tamikio Bohler | W&I Program Analyst |

Public Participants

None

Welcome/Announcements/Comments/Acknowledgement of Citizens

Cedric Jeans opened the meeting at 2:00pm ET and welcomed everyone to the call. Lewis welcomed everyone to the call.

National Office Report

Terrie English welcomed everyone to the call. Recruitment season has closed. We will solicit members to help with the interview process. The second quarter All TAP meeting will be June 17, 2021 at 1:00pm ET with Kenneth Corbin, Commissioner of W&I as the speaker. The Joint Committee (JC) meeting will be June 24, 2021 at 1:30pm ET.

There will be a focus group for military taxpayers soon to come. This is for anyone with any military experience: family members of the military, military contractors, current or

former military members are asked to attend. English made the committee aware that the work from home order has not been lifted, and the travel restriction is still in place. English will keep the committee abreast of any changes that are made to this order.

DFO Report

Jeans reported that we lost Sandy Villella from this committee. The National Taxpayer Advocate (NTA) will release her June objectives report that the committee should review as it may have some information related to the committee's recommendations.

Let us know if you have not received the Annual Report. Jeans thanked the members for helping with the recruitment process. This allowed us to get applications from every area we are recruiting from.

Approval of May 13, 2021 Minutes

Magyar motioned; Daly seconded.

Action: April minutes approved as amended.

Outreach Report

- Magyar reported forwarding a recruitment video this month.
- Consolidated reports are good.
- Smith sent solicitation for the virtual tax forums.
- Share IRS Fresno, CA processing center closing via social media after it closes on June 18, 2021.

Internal Communications Committee (ICC) Update

Scott reported on the switch from a Facebook group to a page. The ICC is working with IRS and Taxpayer Advocate Service (TAS) to complete this task. Thank you to everyone writing articles for the newsletter. We need a volunteer for the next newsletter in the month of July.

Subcommittee 1 Report

Magyar reported:

Issue 48424 - Initials (AMT) In the Instructions

Magyar motioned; Weigel seconded.

Action: Issue elevated to JC

Issue 48369 - Schedule K Forms

Magyar motioned; Weigel seconded.

Action: Issue elevated to JC

Issue 48596 - Form 1040 SR, line 38 "Estimated Tax Penalty

Still being worked.

Subcommittee 2 Report

Usseglio Reported:

Issue 48358 (update) - IRS Form 1040 and 1040SR- **Dropped**

Issue 48410 (update) - Form 1099- **Dropped**

Issue 48321 (update) - Section 218 Agreement SSA- **Still being worked.** We are asking for a Subject Matter Expert (SME).

Issue 50226 (new) - Form 944- Being reviewed for the July meeting.

IRS Responses

Issue 43953 - Publication 502 – Medical and Dental Expenses- Partially adopted. Lewis motioned; Mills seconded.

Action: Accept the IRS response.

Issue 43820 - Schedule A – Itemized Deduction Donations- Partially adopted. Lewis motioned; Weigel seconded.

Action: Accept the IRS response.

Issue 43731 - Form 1310 – Statement of Person Claiming Refund Due a Deceased Taxpayer. Lewis motioned; Magyar seconded

Action: Accept the IRS response.

Screening Committee Report

Issue 48840 - Add Worksheet to Fillable Forms- Sub. 1

Issue 49613 - Social Security Benefits Worksheet lines 5a and 5b- Sub. 2

Action Items

- Issue 48424 Elevated to JC pending Quality Review (QR)
- Issue 48369 Elevated to JC pending QR
- Issue 48840 Sub. 1
- Issue 49613 Sub. 2
- Smith will submit the approved minutes for posting.

Committee Chair and Vice Chair Closing Comments

Lewis thanked everyone for being on the call and for all their work in both subcommittees. Lewis thanked the Screening Committee for all their work. Magyar suggested using the committee minutes to complete the newsletter article. Mills volunteered to complete the next newsletter article.

Closing

Smith thanked the committee for all their time and commitments as it is allowed them to complete tasks in a very efficient manner. Jeans reminded the committee that getting the recommendations accepted is great, especially since they are before the IRS deadline to have them incorporated for next year. Jeans thanked everyone for joining the call and closed the meeting at 2:40pm ET.

**The next monthly meeting
July 8, 2021 at 2:00pm ET.**

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