

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

Staff

- | | |
|--------------------------|--|
| • Kevin Brown | TAP Management Assistant |
| • Terrie English | TAP Director |
| • Antoinette “Toni” Ross | TAP Program Analyst |
| • Fred N. Smith, Jr. | TAP Program Analyst |
| • Antoinette “Toni” Ross | TAP Program Analyst |
| • Michael “Mike” Odom | Wage and Investments (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. Lewis thanked everyone for their work this month and those who volunteered to assist with the interviews for potential new TAP members.

National Office Report

Terrie English reminded the committee of the upcoming meetings:

- Military focus group, July 15, 2021 12:00pm ET, please join.
- Homeless focus group, no date set yet.
- Joint Committee (JC) July 22, 2021 1:30pm ET.
- English thanked those who volunteered to help with the interviews.
- The JC planning session will be the week of August 23, 2021.

DFO Report

Jeans reported there will be about 30 live stream webinars between July 20, 2021 and August 19, 2021 for those interested in Continuing Professional Education (CPE) credits. We have a virtual booth during the tax forums. Smith will conduct training for tax forums on July 13, 2021 2pm ET via Zoom, it will be recorded.

Jeans recommended that members review the National Taxpayer Advocate's June Report to Congress. We are in the process of doing interviews and we thank the members helping with this process. Jeans thanked everyone for their help.

Approval of June 10, 2021 Minutes

There were minor edits and corrections to the minutes. Weigel motioned; Daly seconded.

Action: April minutes approved as amended.

Outreach Report

- Magyar thanked everyone who turned their activity reports in.
- Advance child tax credit information was sent to be shared with your networks.
- Please indicate your involvement with TAP via social media where appropriate.

Internal Communications Committee (ICC) Update

Scott reported the target date for the Facebook change for October 1, 2021. Scott also thanked those who contributed a report for the newsletter.

Subcommittee 1 Report

Weigel reported:

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

The referral seeks to make it easier for people to understand their options to calculate their penalty or request the IRS to make the calculation. Magyar motioned; Scott seconded.

Action: Issue elevated to JC after Quality Review (QR)

Issue 48840 - Add Worksheet to Fillable Forms

Scott motioned; Magyar seconded.

Action: Issue elevated to JC after Quality Review (QR)

Subcommittee 2 Report

Mills Reported:

Issue 50487 – Form 8857

This referral highlights seven important areas:

Under "Important Things You Should Know," bold Do not file this form with your tax return, add, which includes an example of a completed Form 8857, and a notice not to complete for injured spouse relief. Confirmation of what address the taxpayer wants to

use, adding in any refunds; add spacing between two paragraphs; add a web address to the Schedule LEP, and enlarge caution bubble. Weigel motioned; Daley seconded.

Action: Issue elevated to JC after Quality Review (QR)

Issue 50226 - Form 944

The committee is reviewing the effectiveness of this form. We have questions for the program owner, so we are requesting an extension for this review.

Issue 49613 (update) - Social Security Benefits Worksheet

We are asking for additional research because the calculations are so complicated with this form.

Issue 48321 (update) - Section 218 Agreement SSA

We are asking how coordination with other government agencies is done to help clarify this issue. We need a Subject Matter Expert for this project.

IRS Responses:

Issue 43953 - Publication 502 – Medical and Dental Expenses- Partially adopted.

Lewis motioned; Mills seconded.

Action: Accept the IRS response.

Screening Committee Report

Issue 49976 – Misclassification of Bonus Money (Assigned to Sub.-1)

This referral seeks to clarify the instructions for this form.

Issue 49996 – Form 1099-R (Assigned to Sub.-1)

Revision of the form recommended.

Issue 50131 – Fillable Form 941 (Assigned to Sub.-2)

This referral seeks to allow common information to be carried forward in subsequent pages on this form automatically.

Action Items

- Smith will submit the approved minutes for posting.
- **Issue 48596** Elevated to JC pending Quality Review (QR)
- **Issue 48840** Elevated to JC pending Quality Review (QR)
- **Issue 50487** Elevated to JC pending Quality Review (QR)
- Weigel will do the newsletter article for this month.

Committee Chair and Vice Chair Closing Comments

Lewis thanked the committee for all their efforts and invited the committee to join at least one JC meeting to learn what's going on with other committees. Magyar thanked everyone for moving a lot of issues this year.



Closing

Smith thanked the committee for all their time and commitments for this program and reminded the members to capture all of your time for any time you are spending working on TAP issues because some members may not be accounting for all of their time.

Jean reminded August 12, 2021 2:00pm ET next meeting. Jeans thanked everyone for joining the call and closed the meeting at 2:50pm ET.

**The next monthly meeting
August 12, 2021 at 2:00pm ET.**

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