



**Tax Forms & Publications Committee, (TFP)  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Thursday, August 12, 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 (Absent) |
| • 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**

- |                       |  |
|-----------------------|--|
| • Kevin Brown         | TAP Management Assistant                   |
| • Terrie English      | TAP Director                               |
| • Conchata Holloway   | TAP Program Analyst                        |
| • Fred N. Smith, Jr.  | 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 and thanked all the committee members for all of their efforts throughout this past month.

**National Office Report/ DFO Report**

Jeans spoke of the upcoming Joint Committee Planning meeting on August 24-25, 2021 at 1:30pm ET. Please share any issues you think TAP should cover for the 2022 year for any committee.

Jeans shared that we have been asked by the IRS to review and test the Form W4-P. Contact Smith for access to your one-hour time slot for this project. Smith asked for any volunteers to review this form and give your honest feedback to the IRS for this project.

Mike Odom will be away on a 90-day detail and Tamikio Bohler will be covering the TAP in his absence. Jeans reminded the committee that since the year is ending, the committee should start to focus on moving issues they want to complete before then.

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

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

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

### **Outreach Report**

Smith reported the Outreach committee was canceled this month because of many members attending the tax forums. There will be a decision to be made about this month's meeting very soon. We received 100 percent of the Activity Reports. Smith thanked everyone for this and for their outreach efforts.

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

Scott reported the Facebook page is up and the group page is linked and referring people to the page. We are looking for additional Facebook administrators. The Newsletter article due August 25, 2021. Lewis will complete the article this month.

### **Subcommittee 1 Report**

Daley reported:

**Issue 49976** – Misclassification of Bonus Money. This referral seeks to clarify this on the form for taxpayers to easily understand how this should be considered on their taxes. Scott motioned; Weigel seconded.

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

**Issue 49996** (vote) – 1099-R. This issue seeks to add a start date to the form to allow taxpayers to correctly calculate the taxable portion of their annuity when the issue of the 1099-R has not done so. Mills motioned; White seconded.

**Action:** Issue elevated to JC after QR

### **Subcommittee 2 Report**

Scott Reported:

**Issue 48321** (vote) - Section 218 Agreement SSA. This issue seeks to resolve the issues with government employees misclassified as independent contractors and causing tax issues that can be avoided. Daly motioned; Scott seconded.

**Action:** Issue elevated to JC after QR

**Issue 49613** (vote) - Social Security Benefits Worksheet lines 5a and 5b. This referral seeks to correct many complicated parts of this form to make it easier for taxpayers who have to calculate the taxable portion of social security income on this form. Mills motioned; Daly seconded.

**Action:** Issue elevated to JC after QR

**Issue 50131** (vote) - Fillable Form 941. This referral seeks to have Employer Identification Number (EIN), name and address repeated information automatically carry

forward throughout this fillable for making it easier for taxpayers to complete this form properly and accurately. Scott motioned; Weigel seconded.

**Action: Issue elevated to JC after QR**

**Issue 50226** (update) – Form 944

This issue is being worked in collaboration with the Notices and Correspondence committee, we just got the response and will respond later. We are reviewing Form 1040 for 2022. This review is still being worked.

**Screening Committee Report**

Daly reported assigning **Issue 50439** – Form W-4 to subcommittee 1.

**IRS Responses:**

**48369 - Adopted**

**48424 - Adopted**

**43449 - Partially- Adopted**

**49511 (Non- Adopt)** – This rebuttal is going back to IRS for consideration.

**44396 (4 adopts, 1 partial adopt, 6 non-adopt)** – This rebuttal is going back to the IRS for consideration.

**Action Items**

- Smith will submit the approved minutes for posting.
- **Issue 49976** Elevated to JC pending QR.
- **Issue 49996** Elevated to JC pending QR.
- **Issue 48321** Elevated to JC pending QR.
- **Issue 49613** Elevated to JC pending QR.
- **Issue 50131** Elevated to JC pending QR.
- **Issue 49511** Elevate rebuttal to IRS (**JC will be notified**).
- **Issue 44396** Elevate rebuttal to IRS (**JC will be notified**).
- **Issue 50439** assigned to Subcommittee 1.
- Additional issue on Form 1040 to be sent to subcommittee 2.
- Lewis 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 the next JC meeting on August 24-25, 2021 at 1:30pm ET. Jeans thanked everyone for moving a lot of issues this year.

**Closing**

Jeans thanked everyone for joining the call and closed the meeting at 2:53pm ET.

**The next monthly meeting  
September 9, 2021 at 2:00pm ET.**

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