

**Tax Forms & Publications Committee, (TFP)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, October 14, 2021**

Designated Federal Officer (DFO)

- Fred N. Smith, Jr. TAP Program Analyst

Members Present

- | | | |
|-------------------------|----------------------|-----------------|
| • Tor Daley | Anchorage, AK | Member (Absent) |
| • 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 (Absent) |
| • Lucinda Weigel | Vienna, VA | Member |

Staff

- | | |
|-------------------|--|
| • Kevin Brown | TAP Management Assistant |
| • Terrie English | TAP Director |
| • Robert Rosalia | TAP Program Analyst |
| • James Bellinger | Wage and Investments (W&I) Program Analyst |

Public Participants

None

Welcome/Announcements/Comments/Acknowledgement of Citizens

Fred Smith opened the meeting at 2:00pm ET and welcomed everyone to the call.

Roll Call

Quorum was met at approximately 2:12pm ET.

National Office Report

English reported the Tax Pro Demo by Kenneth Corbin will be held on October 20, 2021 at 3:00pm EST. The graduation ceremony will be set for some time in November for the third-year members. The Presidential Awards will be issued for those who qualify for Gold, Silver or Bronze depending on the total hours of each member. The focus group for the Homeless focus group will be set in the near future as well.

DFO Report

Smith reported that the first draft for the Annual Report is due on October 29, 2021. Reach out to Lewis or smith if you want to be part of the review process. Returning members can continue to do outreach in the downtime before the start of the next TAP year. Please add any significant outreach to the SharePoint suppository.

The National Taxpayer Advocate (NTA) and Systemic Advocacy (SA) spoke about the Most Serious Problems (MSPs) and how TAP could assist them with these issues. They may reach out to us for focus groups and Ad Hoc committees in the very near future.

Smith reported the following about the Chair and Vice-Chair Elections and Events:

- Information Session on Being TAP Chair or Vice-Chair was held on October 13, 2021
- Nominations and Self-Nominations- Due midnight, Tuesday, October 19, 2021
- Campaign Statements Due- Midnight Friday, October 22, 2021
- Campaign Statements posted to www.TAPSpace.org-Monday- October 25, 2021
- Meet the Candidate Session- Monday, November 1, 2021 3 PM ET
- Ballots Sent to all Members- Tuesday, November 2, 2021
- Votes/Completed Ballots Due- midnight Tuesday, November 9, 2021
- Results Announced Thursday- November 11, 2021

If you are nominating anyone else, please speak with the person for their approval before doing so.

Approval of August 11, 2021 Minutes

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

Action: April minutes approved as amended.

Outreach Report

Magyar thanked everyone for submitting their reports for this month. Magyar asked for any feedback regarding the outreach suppository.

Internal Communications Committee (ICC) Update

N/A

Subcommittee 1 Report

Magyar reported:

Issue 50439 (vote) - Form W-4

This referral seeks to make changes to allow the form to flow better for taxpayers to be able to complete it. Weigel motioned; White seconded.

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

Issue 51078 (update) - Instructions for Schedule E (Form 1040), Supplemental Income and Loss. **This issue is still being worked.**

Issue 51079 (update) - Instructions for Schedule K-1 (Form 1041) for a Beneficiary Filing Form 1040. **This issue is still being worked.**

Issue 51080 (update) - U.S. Income Tax Return for Seniors
This issue is still being worked.

Subcommittee 2 Report

Mills Reported:

Issue 50226 (vote) - Form 944

This issue seeks to provide formatting and editing changes provide clarity to the form to make it easier for taxpayers to complete this form. This issue also considers the similarities and differences to Form 941 and Form 944 and seeks to make it easy to understand them. Magyar motioned; Weigel seconded.

Action: Issue elevated to JC after QR

Issue XXXXX – Committee created issue from 50226

This issue is still being developed.

Screening Committee Report

Smith met in September with nothing related to this committee, but one issue going to another TAP committee. Smith is still looking for new issues to screen and will decide if there is a need for another screening committee meeting.

IRS Responses:

Issue 50131 – Fillable 941 (ADOPT)

Mills motioned; White seconded. **Accepted**

Issue 48840 – Add Worksheet to Fillable Forms (ADOPT)

Magyar motioned; Mills seconded. **Accepted**

Issue 49511 – PPP Loan (Non-Adopt)

Weigel motioned; Magyar seconded.

Action: Response accepted

Issue 44396 – Schedule LEP (Partially Adopt)

The committee is requesting a more detailed response. **This issue is tabled until then.**

Issue 50487 – Form 8857 (Non-Adopt)

This issue will be rebutted by subcommittee 2.

Issue 48596 – 1040SR Estimated Tax Penalty (Non-Adopt)

Mills motioned; Magyar seconded.

Action: Response accepted.

Action Items

- Smith will submit the approved minutes for posting.
- Issue 50439 Elevated to JC pending QR.
- Issue 50226 Elevated to JC pending QR.
- Non-Adopt to Issue 49511 Accepted.



- Issue 44396 requesting more detailed response.
- Issue 50487 to be rebutted by subcommittee 2.
- Non-Adopt to Issue 48596 Accepted.

Committee Chair and Vice Chair Closing Comments

Lewis and the committee thanked Smith since he will not be at the next meeting.

Closing

Smith thanked everyone for joining the call and closed the meeting at 3:01pm ET.

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

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