



**Tax Forms & Publications Committee, (TFP)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, September 9, 2021**

Designated Federal Officer (DFO)

- Cedric Jeans TAP East Chief

Members Present

- | | | |
|-------------------------|----------------------|---------------------|
| • Tor Daley | Anchorage, AK | Member |
| • Kristen Gentile-White | Gilbert, AZ | Member (Absent) |
| • Martha Lewis | Colorado Springs, CO | Chair |
| • Joseph Magyar | Tampa, FL | Vice-Chair (Absent) |
| • Cynthia (CJ) Mills | Glenside, PA | Member (Absent) |
| • Jon Ramirez | Wichita, KS | Member |
| • Christine Scott | Kapaa, HI | Member |
| • James Usseglio | Hollis, NH | Member |
| • Lucinda Weigel | Vienna, VA | Member (Absent) |

Staff

- | | |
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| • 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.

National Office Report/ DFO Report

Jeans reported that during the Joint Committee (JC) Planning session there was an action plan developed to address some of the challenges raised during meeting. Completing Activity Reports was one issue raised, to which the staff is working to incorporate this report into www.tapspace.org to make it easier for the members to complete and turn in. This is an ongoing project that we hope to have completed before the next TAP year.

Other challenges included sharing examples of virtual outreach on www.tapspace.org to give other members ideas on how to conduct outreach in this fashion. We are also

looking to give more training for chairs and vice-chairs to better prepare them to do their jobs. The National Chair/Vice-chair election process for TAP starts this month. We are encouraging returning members to participate in TAP leadership for next year.

We are working on training for both the National Chair and Vice-Chair to get them familiar with our modified form of Robert's Rules of Order. The Facebook group is being converted to a page. Go to the new page and like the page since it is going away soon.

Approval of August 11, 2021 Minutes

There were edits and corrections to the minutes. Magyar motioned; Ramirez seconded.
Action: April minutes approved as amended.

Outreach Report

Magyar thanked everyone for submitting their reports for this month.

Internal Communications Committee (ICC) Update

Scott reported Facebook group will close in a few weeks, we only have a like to the page until then. Scott requested volunteers for the Newsletter article which is due September 25, 2021. Lewis will complete the article this month.

Subcommittee 1 Report

Daley reported:

Issue 50439 (vote) - Form W-4

Lewis requested sending this issue back to the subcommittee to condense the referral and avoid trying to add an additional page to the Form W-4 and to be specific about what this referral is requesting.

Issue 51078 (update) - Instructions for Schedule E (Form 1040), Supplemental Income and Loss.

Issue 51079 (update) - Instructions for Schedule K-1 (Form 1041) for a Beneficiary Filing Form 1040.

Issue 51080 (update) - U.S. Income Tax Return for Seniors

All three of these issues have a very short turnaround time for the IRS so we will provide the feedback to the IRS and bring it back to the committee next month.

Subcommittee 2 Report

Usseglio Reported:

Issue 51076 (vote) - Schedule SE, Self-Employment Tax

This issue seeks to provide clarity with actual due dates, instead of a range "over the next two years" to make it easier for taxpayers to know the time frame covered by this document. There are also cosmetic changes made to the document. Usseglio motioned; Scott seconded.

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

Issue 51077 (vote) - Schedule C, Profit & Loss From Business

This issue seeks to provide clarity with actual due dates, instead of a range “over the next two years” to make it easier for taxpayers to know the time frame covered by this document. There are also some cosmetic changes made to the document. Link to IR-2020-299, December 22, 2020 added with standard mileage rates; Some changes were made for clarity what can be written off on the form to make it easier to complete this form. Scott motioned; Hughes seconded.

Action: Issue elevated to JC after QR

Issue 50966 (vote) - F1040 Review for Tax Year 2021

This referral seeks to fix small errors, verbiage, and formatting issues to make the form clearer and easier to complete by taxpayers. Magyar motioned; Scott seconded.

Action: Issue elevated to JC after QR

Issue 50226 (update) - Form 944

This referral seeks to ensure this form is understood or being used correctly by taxpayers.

1. One consideration is having one form 941 and have them pay based on the amount being taxed.
2. Second is to clarify as best we can when the taxpayer as to fill out these forms.

We are working with the Taxpayer Communications committee on this issue. We will meet on their next subcommittee meeting for this issue. This will be sent to the committee for comment or input on this issue.

Screening Committee Report

Smith will review the raw data and grab anything that might be covered by our committee. Smith will also review older issues to see if there is anything we may have missed. Smith will report back next week after this review.

Action Items

- Smith will submit the approved minutes for posting.
- Issue 51076 Elevated to JC pending QR
- Issue 51077 Elevated to JC pending QR
- Issue 50966 Elevated to JC pending QR
- 50439 back to sub to continue work
- 50226 to be share with the other subcommittee
- M. Lewis completing newsletter article



Committee Chair and Vice Chair Closing Comments

Lewis reported everyone will be invited to all of the subcommittee meetings for the rest of the year so the entire committee can see what is being done. Lewis is working on the Annual Report. Lewis will send this out to the committee to be reviewed.

Returning members will have a chance to select a committee in December or January before the next TAP year.

Closing

Jeans thanked everyone for joining the call and closed the meeting at 2:42pm ET.

**The next monthly meeting
October 14, 2021 at 2:00pm ET.**

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