



**Tax Forms & Publications Committee (TFP)  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Thursday, November 10, 2021**

**Designated Federal Officer (DFO)**

- Cedric Jeans TAP East Chief

**Members Present**

- |                         |                      |                     |
|-------------------------|----------------------|---------------------|
| • Tor Daley             | Anchorage, AK        | Member (Absent)     |
| • 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              |
| • 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                               |
| • Robert Rosalia         | TAP Program Analyst                        |
| • Antoinette "Toni" Ross | TAP Program Analyst                        |
| • James Bellinger        | Wage and Investments (W&I) Program Analyst |

**Public Participants**

None

**Welcome/Announcements/Comments/Acknowledgement of Citizens**

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

**Roll Call**

Quorum was met.

**National Office Report**

English wished a Happy Veterans Day to all those who served. Please thank any family members for their service. English thanked the committee for all they have offered this year. Because of your efforts, the taxpayer's voice is being heard. English also thanked our IRS partners for their assistance throughout the year. The Joint Committee (JC) meeting will be on November 18, 2021, at 1:30pm ET. This is a good chance to accumulate TAP hours for your activity report.

The graduation ceremony will be on November 19, 2021, at 1:00pm ET. You can honor them by sharing messages if any of them impacted you with your committee analyst for this celebration.

English said the TAP leadership for the next year will be shared very soon since the election process ended yesterday. Lewis requested a list of all who are graduating. Jeans will send this list out.

### **DFO Report**

Jeans thanked the committee for all of the work this year and hoped we can get back to face-to-face work next year. Jeans thanked this committee for the important work noting that the public should appreciate this work. Jeans thanked the IRS partners for all their work and participation in helping TAP get their work done.

We hope to have new member orientation, and returning members are welcome to join this call for refreshers if they decide to attend. February or March will be around the beginning of the next TAP year, so plan accordingly, please.

### **Approval of October 14, 2021 Minutes**

There were minor edits and corrections to the minutes. Mills motioned; Usseglio seconded.

**Action:** October minutes approved as corrected.

### **Outreach Report**

Lewis reported Magyar had to retire early due to professional conflict. Lewis welcomed the committee to reach out to Magyar since he has resigned. Magyar would like members to go to the Facebook page and like it. We had 100 percent of the activity reports submitted. Send activity report to Smith and carbon copy the TAP email for this month. Lewis encouraged members to keep turning in reports.

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

Scott reported the Annual Report was rebranded to be consistent with the changes to the TAP website, along with other things. The proposed change will be sent to JC to be approved at the next meeting.

### **Subcommittee 1 Report**

Weigel reported:

#### **Project 51474 – Schedule H Household Income**

This is for taxpayers who work inside homes and have specific tax requirements. This referral seeks to get these taxpayers the credits they are eligible for during the pandemic with some of the COVID relief programs. Suggestions will be sent to the IRS as a draft. It will probably go to the JC next TAP year because of the time constraints. Additional comments will be forwarded to Jeans by the committee by November 15,

2021. Jeans will work to get this over to the IRS as a draft after the committee works on it.

### **Subcommittee 2 Report**

Mills Reported:

#### **Project 50487 (rebuttal) - Form 8857**

The recommendations were meant to get the taxpayers' attention on the form by bolding and adding information for purposes of clarity. Form 2087 required different terminology, so we want this to be reconsidered. This issue seeks clarity between the two forms for taxpayer understanding when completing these forms.

**Action: Issue elevated to IRS as a rebuttal. The JC will be notified.**

### **IRS Responses:**

#### **Project 49976 – Misclassification of Bonus Money (Partially Adopted)**

Weigel motioned; Scott seconded.

**Action: Response accepted.**

#### **Project 48321 – Section 218 SSA**

Mills motioned; Scott seconded.

**Action: Response accepted.**

#### **Project 49613 – SSA Worksheet (Rebutted)**

This has been rewritten for clarity and consistency for the taxpayer's understanding of the form for this rebuttal. An updated version of this rebuttal will be shared with the committee for their records.

**Action: Issue elevated to IRS as a rebuttal. The JC will be notified.**

### **Action Items**

- Smith will submit the approved October minutes for posting
- 50487 Rebuttal
- 49613 Rebuttal
- Response for Issue 49976 Accepted
- Response for Issue 48321 Accepted

### **Committee Chair and Vice Chair Closing Comments**

Lewis thanked the committee for growing so well this year and for all they did to help make this a successful year. Lewis thanked the IRS partners for helping the way they did this year also. Lewis thanked all of the new members and invited the entire committee to join the next JC meeting. Lewis thanked everyone for voting on next year's Chair and Vice-Chair. Lewis encouraged everyone to reach out to Magyar. Thanked Jeans for leading the committee.



Jeans shared some kind words left by Smith and welcomed members to join this committee next year should they choose to. Jeans wished happy holidays to all. Jeans encouraged returning members to keep doing outreach and add stuff to [www. TapSpace.org](http://www.TapSpace.org) before we start the next TAP year. Reach out to the staff if you have any questions in the meantime.

**Closing**

Jeans thanked everyone for joining the call and closed the meeting at 2:56pm ET.

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

**The next monthly meeting  
TBD**