



**Tax Forms & Publications Committee (TFP)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, May 10, 2022**

Designated Federal Officer (DFO)

- Cedric Jeans TAP East Chief

Members Present

- | | | |
|---------------------------|----------------------|-----------------|
| • Tor Daley | Anchorage, AK | Member |
| • Joseph “Joe” Edelen | Vermillion, SD | Member |
| • Kameelah Guthridge | Columbus, OH | Member (Absent) |
| • Charles Harvey | Albany, NY | Member (Absent) |
| • Martha Lewis | Colorado Springs, CO | Member |
| • Jean Miller | Middletown, CT | Member |
| • Kimberly Pederzani | Barrington, IL | Member (Absent) |
| • Christine Scott | Kapaa, HI | Chair |
| • Patricia “Pat” Thompson | Providence, RI | Vice-Chair |
| • Lucinda Weigel | Vienna, VA | Member |

Staff

- | | |
|--------------------------|--------------------------------------------|
| • Kevin Brown | TAP Management Assistant |
| • Terrie English | TAP Director |
| • Gilbert Martinez | TAP Program Analyst |
| • Robert Rosalia | TAP Program Analyst |
| • Antoinette “Toni” Ross | TAP Program Analyst |
| • Fred Smith | TAP Program Analyst (Excused) |
| • Michael Odom | Wage and Investments (W&I) Program Analyst |
| • Schenita Thornton | W&I Program Analyst |
| • Rosemary Rixey | Policy Analyst W&I |

Welcome/Opening

Jeans opened the call and welcomed everyone.

Public Participants

None

Welcome/Announcements/Comments/Acknowledgement of Citizens

Scott welcomed everyone to the call. Scott reminded members to go to www.tapspace.org to update their profile and add all activities to their activity report.

National Office Report

English reported that the Tax Forums will be held virtually from July 19, 2022, through August 18, 2022, this year. Please contact your analyst or the outreach analyst if you

would like to be a part of this virtual booth. English indicated that the recruitment process for the 2023 year has started. Those who would like to be part of the interview process can let your analyst know. English also explained that this process is almost a year long. This would explain why it takes such a long time for new members to be notified if they are selected. TAP members can use this information should someone ask them why it is taking so long for them to be a part of TAP.

Interviews for 2023 TAP panel will be starting soon. English reminded the committee that the selection process is long and has a lot of different parts to it. This information can be shared with anyone concerned about not being selected to the TAP for some time after a person has applied. English indicated members can learn a lot by participating in this process. The business cards will be sent out soon. Returning members should let your analyst know if you need more cards.

DFO Report

Jeans suggested going to www.irs.gov and subscribing to IRS news releases to help with your research for TAP. This may help keep us informed on what the IRS is already working on.

Approval of Minutes

April 12, 2022, minutes. Edelen motioned; Weigel seconded.

Action: April minutes approved as corrected.

Outreach Report

Thompson reported the first meeting focused on helping with outreach opportunities by using Facebook, LinkedIn, or other social media options. Thompson gave examples of outreach with family, friends, or professional organizations. There is an outreach toolkit on www.tapspace.org to help with such events. The next Outreach committee meeting is May 26, 2022.

Internal Communications Committee (ICC) Update

Lewis reported no projects in the first meeting and solicited a member to represent this committee on the ICC. The committee is still working on improving some internal documents and working on social media within TAP. It does overlap with the Outreach committee. The next ICC meeting is May 25, 2022, at 12:00pm. Daley will do the newsletter for this month. Scott will work with Jeans to select a member for the ICC.

Subcommittee 1

Miller reported:

Issue 50431- ID 2168 and ID 2169 were discussed, and IRS will collaborate with Treasury and Chief Counsel to allow the taxpayer to be able to input a specific dollar amount per pay period to be deducted. The IRS will respond back to us about this.

Issue 50439 (update) - Form W4, Employee's Withholding Certificate. IRS will collaborate with Chief Counsel and respond back to TAP.

Issue 50226 (rebut and accept) - Form 944, Employer's Annual Federal Tax Return, will be rebutted. Daley motioned; Edelen seconded.

Action: Rebuttal will be sent to the IRS.

Issue 52441 (drop) - Form 990 instructions

The subcommittee accepted the response and recommended dropping this issue.

Issue 52617 (update) - Form 8812 has gotten too complicated

This issue continues to be worked.

Subcommittee 2

Scott reported:

Issue 52476 (update) - Make employers fill out the form 1095-c properly

This issue is still being worked. Submit any questions for the Subject Matter Expert (SME) prior to the meeting.

Issue 52596 (update) - Form 1040

This issue is still being worked. Submit any questions for the SME prior to the meeting.

Action Items

- Smith will submit the approved April minutes for posting.
- Rebuttal for Issue 50226 to be sent to IRS.
- Issue 52441 dropped.
- Daley will do this month's newsletter.
- New ICC member to be selected.
- Issues 52617; 52476; 52596 are still being worked.
- Issue 50439 is awaiting an IRS response on 2 IDs.

Committee Chair and Vice-Chair Closing Comments

Scott asked to finish profiles in www.tapspace.org, upload activities, and join the ICC and the Thompson reminded the committee to do outreach and use the tools on www.tapspace.org for assistance.

Closing

Jeans thanked everyone for joining and closed the meeting at 1:32pm

**The next monthly meeting
June 14, 2022, at 1:00pm EST**

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