

**Tax Forms & Publications Committee, (TFP)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, October 11, 2022**

Designated Federal Officer (DFO)

- Fred Smith Acting TAP East Chief

Members Present

- | | | |
|---------------------------|----------------------|-----------------|
| • Tor Daley | Anchorage, AK | Member (Absent) |
| • Joseph “Joe” Edelen | Vermillion, SD | Member |
| • Kameelah Guthridge | Columbus, OH | Member |
| • Charles Harvey | Albany, NY | Member |
| • 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 (Absent) |

Staff

- | | |
|--------------------------|--|
| • Kevin Brown | TAP Management Assistant |
| • Terrie English | TAP Director |
| • Robert Rosalia | TAP Program Analyst |
| • Antoinette “Toni” Ross | TAP Program Analyst |
| • Tamikio Bohler | Wage and Investments (W&I) Program Analyst |

Welcome/Opening

Smith opened the call and welcomed everyone.

Public Participants

None

Welcome/Announcements/Comments/Acknowledgement of Citizens

Scott welcomed everyone to the call and thanked the two members in their last year on TAP, Joe Edelen, and Martha Lewis. Scott said that during the Joint Committee (JC) planning meeting, there were a number of ideas for the future given the new law that was passed and the IRS getting more money from it. Scott reminded the committee that TAP is going back to Systemic Advocacy (SA). Scott reminded everyone that next month will be TAP elections for the Chair and Vice-Chair. Please send a message to Smith if you would like to learn more or run for a position. Scott solicited the committee for an additional member for the screening committee and asked for members to reach out to herself or Smith if interested.

National Office Report/DFO Report

English reminded members to make the meetings so we can finish the year strong and not have issues over for next year. English encouraged the committee to complete as many of this year's issues, so there are few or no issues remaining for next year. The JC will meet on October 27, 2022, at 1:30pm ET. The TAP 20-year logo is available to be used now. Please use it. The websites have been updated, and the National Taxpayer Advocate (NTA) will also be doing a blog about this.

English thanked everyone who attended the Ad Hoc meetings and noted that they will be used in the NTA's Most Serious Problems (MSPs). English reminded the committee about the nominations for the Chair and Vice-Chair elections for next year. English also noted that for the 2023 recruitment effort, we are trying to add as many alternates as possible for next year.

Approval of Minutes

September 13, 2022 minutes up for approval. Edelen motioned; Miller seconded.

Action: September minutes approved as amended.

Outreach Report

Thompson shared that the activity reports need to be completed since we are heading toward the end of the year. The purpose of our outreach is to get issues elevated to the IRS.

Internal Communications Committee (ICC) Update

Lewis reported the TAP member handbook review is complete. The ICC is still working on Facebook topics, with the 20-year anniversary being the focus. Lewis asked that we all like and follow the page, please. Any social media posting is considered outreach, so please record it as such.

Subcommittee 1

Miller reported:

Issue 61995 Form 8862- Dropped

Issue 61996 Pub. 929 was edited. Edelen motioned; Miller seconded.

Action: Issue 61996 elevated to JC.

Issue 62742 Form 8615 is a new issue being worked.

Subcommittee 2

Thompson reported:

Issue 52664 Form 3520- This is being reviewed, and we are reaching out to the other subcommittee to work on this issue together.

IRS Responses

Smith reported:

Issue 52617 Form 8812, Credits for Qualifying Children and Other Dependents.

The response was resolved prior to elevation with the American Rescue Plan of 2020. Edelen motioned; Miller seconded. Jones declined the motion requesting a detailed explanation. Was this resolved because this form will not be available next year or because they are not going to put this element in the form? Scott said the credit was temporary and has expired. Jones withdrew his nay and the motioned carries.

Action: Response accepted by the committee.

Issue 50439 Form W4, Employee's Withholding Certificate. Lewis recommended a rebuttal to response 2168. Response 2169 was accepted. Edelen motioned; Miller seconded.

Screening committee

No Action.

Action Items

- Scott will update the Annual Report with today's meeting information.
- Issue 61996; Issue 52476; and Issue 52596 elevated to JC.
- Smith will submit the approved September minutes for posting.

Committee Chair and vice Chair Closing Comments

Smith asked the committee to be available to assist Scott on the report for the Annual Report. Speak with Smith about activity reports if you need help. Please participate in the TAP election process for next year. English reminded the committee of the glitch in the activity report, so please give yourself credit for all of your hours worked for TAP.

Scott thanked everyone for all their work and is looking to finish the year strong.

Closing

Smith thanked everyone for joining and closed the meeting at 1:30pm ET.

**The next monthly meeting
November 8, 2022, at 1:00pm EST**

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