



**Tax Forms & Publications Committee, (TFP)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, June 14, 2022**

Designated Federal Officer (DFO)

- Terrie English TAP East Chief

Members Present

- | | | |
|---------------------------|----------------------|------------|
| • Tor Daley | Anchorage, AK | Member |
| • 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 |
| • 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 |
| • Antoinette “Toni” Ross | TAP Program Analyst |
| • Fred Smith | TAP Program Analyst |
| • Michael Odom | Wage and Investments (W&I) Program Analyst |
| • Schenita Thornton | Program Analyst W&I |
| • Rosemary Rixey | Policy Analyst W&I |
| • Suzanne Henderson | Tax Analyst W&I |
| • Leslie Henley | Program Analyst W&I |
| • Octavia Johnson | Program Analyst W&I |
| • Jamelle Pace | Tax Analyst W&I |
| • Thomas Welch | Program Analyst W&I |

Welcome/Opening

English opened the call and welcomed everyone.

Public Participants

None

National Office Report/ DFO Report

English thanked everyone who joined the TAP quarterly meeting and asked the members to send any questions for the National Taxpayer Advocate (NTA) to the analyst to for her response. English shared that having the NTA on our call shows how TAP's work has been approved at the highest levels in Taxpayer Advocate Service (TAS). English reminded the members of the media training and sharing articles, media interviews so we can upload them to www.improveirs.org. We would like to put these out for the public to see.

English reminded the committee to sign up for the tax forums so we can have good coverage from TAP. Contact your analyst to sign up.

Welcome/Announcements/Comments/Acknowledgement of Citizens

Scott welcomed everyone to the call. Thompson welcomed everyone to the call.

Approval of Minutes

Minor corrections were made to the May minutes. Edelen motioned; Weigel seconded.

Action: May minutes approved as corrected.

Outreach Report

Thompson reported working on social media outlet messaging by animation means and other modern techniques. They will tailor outreach messages for current issues in TAP. They will be working on recruitment in underserved states to get more representation to get more coverage. Thompson reminded the committee to use the outreach toolkit and to complete your activity reports as accurately as possible, including all TAP activities.

Thompson suggested as soon as you complete a meeting or a research task to logon and complete it. The committee is looking for experts in outreach like social media. We discussed using newsletter for talking points to do outreach. Some members are doing outreach at a church bizarre and the National Practitioner website. Please share to doing outreach if there are any. One member did outreach at a bar-b-que with their Local Taxpayer Advocate, while another member wrote an article in the Sky Urban center, someone else used the TAP banner on LinkedIn, participated in IRS experience days and also contacting various local nonprofit organizations.

Internal Communications Committee (ICC) Update

Lewis reported working on TAP member handbook. Please review the handbook and offer suggestions to improve it. The ICC is working on reformatting the newsletter. Lewis asked for any thoughts to improve the newsletter. Lewis thanked Tor Daley for last month's newsletter. Weigel will do the next newsletter. Miller offered to do work outside of the meeting times for the ICC.

Subcommittee 1

Harvey reported:

Issue 52617 (vote) - Form 8812 has gotten too complicated. This referral seeks to explain how military service affects the personal place of abode meaning to make it easier for taxpayers to complete this form. Edelen motioned; Weigel seconded.

Action: Issue will be sent to the Joint Committee.

Subcommittee 2

Scott reported:

Issue 52476 (vote) - Make employers fill out the form 1095-C properly
This issue is tabled until next month.

Issue 52596 (update) - Form 1040 Instructions
This issue is still being worked.

Screening Committee

Issue 51059 – E-file Info into Transfer

Assigned to Subcommittee 1. Smith will review this and report back to the committee to determine which form(s) this issue will focus on.

Issue 52541 – Form 1040 Instructions

Assigned to Subcommittee 2. There was a discussion about when this will be done; the committee is expecting the instructions really soon.

Action Items

- Smith will submit the approved April minutes for posting.
- Issue 52617 to JC after QR.
- Reminder to committee to include all time for TAP activities on the activity report.
- Smith to get activity report summary to Thompson.
- Smith will report back on Issue 51059.

Committee Chair and vice Chair Closing Comments

Scott thanked Smith and Thompson for their efforts during this meeting. We need an ICC representative for the committee.

Closing

English thanked everyone for joining and closed the meeting at 1:45pm

**The next monthly meeting
July 12, 2022, at 1:00pm EST**

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