

**Tax Forms & Publications Committee (TFP)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, July 12, 2022**

Designated Federal Officer (DFO)

- Cedric Jeans TAP East Chief

Members Present

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

Staff

- | | |
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| • Kevin Brown | TAP Management Assistant |
| • Terrie English | TAP Director |
| • Cedric Jeans | TAP East Chief |
| • Gilbert Martinez | TAP Program Analyst |
| • Fred Smith | TAP Program Analyst |
| • Michael Odom | Wage and Investments (W&I) Program Analyst |
| • Leslie Henley | Program Analyst W&I |
| • Jamelle Pace | Tax Analyst W&I |

Welcome/Opening

Jeans opened the call and welcomed everyone.

Public Participants

Lee Zimet

Welcome/Announcements/Comments/Acknowledgement of Citizens

Thompson welcomed everyone to the call. Thompson reminded members to complete outreach records and to make sure the subcommittee meetings are productive. Send written responses or comments ahead of the meetings so we can get more done during these meetings.

National Office Report

English thanked everyone who signed up to join the tax forums. There is an opening for August 17, 2022, at 1:00pm that still needs to be filled. Training for the tax forums will be held immediately after this meeting today. English is looking forward to meeting the chairs during the JC planning session next month.

DFO Report

Jeans indicated that we are preparing for the new candidate interviews, and we are looking for help from our members. Smith indicated that input from TAP members will be good for this process. Please volunteer for as many as you can. The interviews will go from July 25, 2022, through August 12, 2022, from 8:00am to 5:00pm ET. The email for this came from Fred Smith and Priscilla Medrano. Please respond before next Monday, July 18, 2022, that will be helpful for this project.

Approval of Minutes

June 22, 2022 minutes presented for approval. Weigel motioned; Miller seconded.

Action: June minutes approved as submitted.

Outreach Report

Thompson followed up that the tax forums will start on July 19, 2022, and run for five weeks via live webinars on Tuesdays, Wednesdays, and Thursdays. In addition, Thompson shared a variety of outreach events by the committee members to include:

- Local Taxpayer Advocate (LTA) and Criminal Investigation (CI) event.
- TAP information on Facebook.
- TAP information on Twitter.
- Problem-solving events with the IRS.
- Local outreach events.
- Sharing how to upload issues with neighbors.
- Bar-b-que event.
- One member joined an event in Washington D.C. with Electronic Tax Administration Advisory Committee (ETAAC).

Internal Communications Committee (ICC) Update

Smith reported that Jean Miller will represent ICC and report out next month.

Subcommittee 1

Miller reported:

Issue 56271 (vote) - Form 8863 Revision – Education Credits. This referral seeks to make the instructions for this form clearer for taxpayers to be able to properly complete. Weigel Motioned; Miller 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.
Weigel motioned; Miller seconded.

Action: Issue will be sent to the Joint Committee.

Issue 52596 (update) - Form 1040

We are working on recommendations, and we estimate this to be completed by next month.

IRS Responses:

Issue 48840 (update) – Add Worksheet to Fillable Forms

The IRS has changed the implementation to year 2025.

Issue 50131 (update) – Fillable Form 941, Employers Quarterly Federal Tax Return

The date was pushed out to 2025, but this may have already been implemented as taxpayers have been using it. Odom indicated we don't have the full functionality that we want, which is why the implementation date has been changed. Odom said we will report back to TAP when this has been completed.

Screening committee

Smith indicated there will be a meeting tomorrow to review inventory. We are anticipating three or four issues to come from this meeting and to the subcommittees by the end of the week.

Action Items

- Smith will submit the approved June minutes for posting.
- Issue 56271 and 52476 to JC after Quality Review (QR).
- Smith will send an email reminder about the tax forums.
- Smith will send a reminder email about the recruitment interviews.

Committee Chair and vice Chair Closing Comments

Thompson thanked everyone for all they do for the committee and reminded members to do outreach and complete the activity reports.

Closing

English thanked everyone for joining and closed the meeting at 1:36pm ET.

**The next monthly meeting
August 9, 2022, at 1:00pm EST**

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