



**Tax Forms & Publications Committee (TFP)  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Tuesday, August 9, 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           |
| • Charles Harvey          | Albany, NY           | Member           |
| • Martha Lewis            | Colorado Springs, CO | Member (Excused) |
| • 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 (Excused)         |
| • Terrie English   | TAP Director (Excused)                     |
| • Gilbert Martinez | TAP Program Analyst (Excused)              |
| • 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**

None

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

Scott welcomed everyone to the call.

### **National Office/DFO Report**

Jeans thanked everyone for coming to the meeting. He mentioned that he, Smith and Scott were in Washington, DC for the annual JC Planning Meeting. Lewis and English are presiding over that meeting and not in attendance today.

### **Approval of Minutes**

July 2022 minutes presented for approval. Weigel motioned; Thompson seconded.

**Action:** July minutes approved as submitted.

### **Outreach Report**

Thompson followed up that the tax forums will end on August 19, 2022 Thompson informed members that if they are in need of business cards or a name badge to reach out to the analyst. She also mentioned taking pictures at events but being sure to obtain authorization forms. She also reminded members to submit information on activity reports.

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

Miller reported that she attended her first ICC meeting. The ICC is working on the Facebook Group status, the TAP Handbook review and TAPspace.org suggestions/updates. Scott solicited for a newsletter volunteer. Hearing none, she volunteered to write this month's article.

### **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. Scott calls for a vote. It passes. Approved to go back to JC.

**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.

Scott calls for a vote. It passes. Approved to go back to JC.

**Action:** Issue will be sent to the Joint Committee.

**Issue 52596 (update)** - Form 1040

This referral seeks to make the instructions for this form clearer for taxpayers to be able to properly complete. A motion was made by Scott to move this referral forward without recommendation #4. Committee agrees. Motion passes.

**Action:** Issue will be sent to the Joint Committee.

### **Screening committee**

Smith indicated there will be a Friday afternoon to review inventory. However, there were 4 issues brought to the committee to decide if they wanted to work:

Issue 52633 – decided not to keep  
Issue 52657 – will be assigned to Sub-committee 1  
Issue 52664 – will be assigned to Sub-committee 2  
Issue 60608 - decided not to keep

### **Action Items**

- Smith will submit the approved July minutes for posting.
- Issue 52596 to JC after Quality Review (QR).
- Issues 56671 and 52476 to JC without QR review as they were previously reviewed.
- Smith will take recommendation #4 from Issue 52596 and create a new issue number.
- Smith will follow-up with Jeans about two questions sent to SME for response related to Issue 52596; Smith will also send these questions to Odom.

### **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**

Jeans thanked everyone for joining and closed the meeting at 1:39pm ET.

**The next monthly meeting  
September 13, 2022, at 1:00pm EST**

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