

**Tax Forms & Publications Committee, (TFP)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, November 8, 2022**

Designated Federal Officer (DFO)

- Cedric Jeans 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 (Absent) |
| • Martha Lewis | Colorado Springs, CO | Member |
| • Jean Miller | Middletown, CT | Member (Absent) |
| • Kimberly Pederzani | Barrington, IL | Member |
| • Christine Scott | Kapaa, HI | Chair |
| • Patricia “Pat” Thompson | Providence, RI | Vice-Chair |
| • Lucinda Weigel | Vienna, VA | Member (Absent) |
| • Eugene Lillie | National Vice-Chair | Visitor |

Staff

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

Public Participants

Donna Tucci Illinois Society for Enrolled Agents (Chicago, IL)

Welcome/Opening

Jeans opened the call and welcomed everyone. Quorum was not achieved at the beginning of the meeting but was achieved at 1:30pm.

Roll Call

Brown completed roll and quorum was not met. After Pederzani joined at approximately 1:30pm quorum was achieved, and the meeting was open for voting.

Welcome/Announcements/Comments/Acknowledgement of Citizens

Scott thanked everyone for attending the call, welcomed the members of the public and acknowledged the two graduating members on this committee, Martha Lewis, and Joe Edelen. Scott reported that issues 52476, 52596, and 61996 were approved by the Joint Committee (JC) and elevated to the IRS.

National Office Report

English let the members know she appreciates the work this committee did this year. English reported that the IRS is doing a big hiring push and asked the members to share this with anyone who may be looking for work at this time. Flyers have been sent to the committee with this information on it. English asked the returning members to continue with their outreach about TAP. English will be throwing a “Coffee Party” for each committee that made quorum for the year.

DFO Report

Jeans thanked the committee and Scott for her leadership and for the hard work this committee has done this year.

Approval of Minutes

October 11, 2022, minutes up for approval. Edelen motioned; Thompson seconded

Action: October minutes approved as amended.

Outreach Report

Thompson encouraged returning members get outreach done. While doing outreach Thompson encouraged members to look for potential members from all of the states for TAP next year. Outreach using animation memes being worked within the Outreach Committee. Please keep activity reports up to date. Thompson thanked IRS for their assistance. Scott added, please reach out to your Local Taxpayer Advocate (LTA) for outreach opportunities.

Internal Communications Committee (ICC) Update

Scott reported they are looking for suggestions for getting more Facebook followers.

Subcommittee 1

Edelen reported:

Issue 62742 (update) - Form 8615 - Tax Rules for Children and Dependents

Issue was dropped.

Rebuttal for Issue 50439- Subcommittee recommended to accept response for recommendation by the subcommittee. Edelen motioned; Lewis seconded.

Action: Response accepted from IRS.

Subcommittee 2

Issue 52664 (update) - Review of Instructions for Form 3520

Scott reported this issue is being carried over into next year.

IRS Responses

Smith reported:

Issue 50439 - Form W4, Employee's Withholding Certificate
Edelen motioned; Lewis seconded.

Action: Response accepted by the committee

Issue 56271 - Form 8863 Revision – Education Credits
Lewis motioned; Edelen seconded.

Action: Response accepted by the committee.

Screening committee

Tabled

Action Items

- Submit questions related to Issue 52664- Form 3520 to Smith.
- Post October minutes.
- Response to Issue 62742 accepted.
- Response to Issue 56271 accepted.
- Issue 50439 accepted.

Committee Chair and vice Chair Closing Comments

The graduation is on Friday, December 18, 2022. Scott asked returning members consider coming back to the committee next year. Ms. Tucci asked about issues and Jeans responded it will be included in the Annual Report. Ms. Tucci asked how suggestions are handled by TAP. Scott explained how issues are screened and processed. Scott reviewed issues received, screened, accepted, and developed into issues to include recommendations; elevation to the IRS and possible rebuttal process.

Scott encouraged Ms. Tucci to apply to join TAP when the recruitment period opens if she is interested in being a part of TAP. Jeans share the TAP email if she would like a TAP speaker for future events.

Lillie indicated this is the very reason we should have a better social media presence, so taxpayers have more access and an easier way to attend our meetings. Do outreach and keep your activity report accurate. Lillie thanked the IRS staff for all the hard work they do for the TAP. Scott thanked the staff and everyone who helped the committee this year. Thompson thanked everyone for all the help and effort this year and looks forward to next year. Lewis thanked everyone for all of their hard work this year and asked members to come back to this committee next year for continuity. Lewis thanked Smith, Jeans, and Scott for their leadership and support. Jeans asked the committee to submit their committee preferences for next year.

Closing

Jeans thanked everyone for joining and closed the meeting at 1:44pm ET.

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

The next monthly meeting TBD