

**Tax Forms & Publications Committee, (TFP)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, May 16, 2023, 2pm ET**

Designated Federal Officer (DFO)

- Cedric Jeans TAP East Chief

Members Present

- | | | |
|---------------------------|------------------|-----------------|
| • Tor Daley | Anchorage, AK | Member |
| • Ellen Dickey | Dakota Dunes, SD | Member |
| • Joel Gelb | Brooklyn, NY | Member (Absent) |
| • Philip George | Saint George, UT | Member |
| • Kameelah Guthridge | Columbus, OH | Member (Absent) |
| • Charles Harvey | Albany, NY | Member |
| • Jean Miller | Middletown, CT | Vice-Chair |
| • Kimberly Pederzani | Barrington, IL | Member (Absent) |
| • Taletha Manigo-Brown | Ewa Beach, HI | Member |
| • Patricia "Pat" Thompson | Providence, RI | Chair |
| • Lucinda Weigel | Vienna, VA | Member |

Staff

- Robert Rosalia TAP Program Analyst
- Ann Tabat TAP Program Analyst
- Kudiratu Usman-Olugunna TAP Program Analyst

Welcome/Opening- DFO

Cedric Jeans opened the meeting at 2:00pm ET.

Roll Call

Jeans completed roll call and quorum was met.

Members of the Public

None

Welcome/Announcements/Comments/Acknowledgement of Citizens

Pat Thompson welcomed everyone and reviewed the agenda.

National Office Report

Jeans reported National Taxpayer Advocate (NTA) objectives report has posted. The report includes six of TAS's Case Advocacy and Business Objectives for FY 2023.

Members are encouraged to review as it may relate to projects within their committee, and to subscribe to IRS.gov for new releases.

Committee News & Updates

Thompson discussed the April 2023 meeting minutes were not available and will be tabled and addressed at next meeting in June. Thompson encouraged members to update TAPSpace activity reports and continue outreach activities.

TAP Committee Update

Robert Rosalia advised the status on IRS responses from projects submitted in 2022, no information provided at this time but will have updates by next meeting. Projects still awaiting IRS responses Project 52476 Form 1095-C and Project 52596 Form 1040.

Subcommittee 1

Tor Daley reported subcommittee one has met and made recommendations for Project 62742 regarding Form 8615 and instructions (Children Who Have Unearned Income); the recommendations spawned from the Publication 929 project worked last year, but is now obsolete. The subcommittee reviewed the Publication 929 with the Form 8615 and instructions and determined if everything was addressed. Upon completing this review they believe that the Form 8615 referral should be complete for approval next meeting.

Subcommittee 2

Lucinda Weigel reported subcommittee two is working Issue 52664 regarding Form 3520 and 3520A (Foreign Trust) and gifts. A variety of issues have been determined resulting in approximately 25 pages of recommendations. The subcommittee should be ready to present at the next meeting.

2023 TAP Annual Report (Committee Check List)

Rosalia discussed blurbs to be assigned to committee members regarding the monthly newsletter due the 25th of each month. Jeans advised to reduce length keep the write-ups to a minimum. Charles Harvey volunteered to write the paragraph for subcommittee one and Weigel volunteered to write a paragraph for subcommittee two.

Screening Report

Thompson informed the members the April screening report was completed, and items were added to the parking lot. Screening from today's meeting will add additional items to the parking lot.

The following Issues project proposals were accepted to be worked as projects:

Project: 55647 Form 8915 assigned to subcommittee one

Project: 55265 Form 2210 assigned to subcommittee two

The following will be added to the parking lot:

Issue: 58049 Review of 1099-K
Issue: 58869 VITA form 13614
Issues: 58911, 55678, 57074 Review W-4
Issue: 60161 Form 1040 NR

Two additional projects (No project number yet) on the following subject: Scholarships to include From 1098-T, Pub 970, earned or unearned for various tax provisions and IPPIN for children were also added.

The two committees will start looking at the following two larger scale projects identified during screening, one revolving around Digital Assets/Crypto issues and the other on Decedent.

Outreach

Jean Miller advised members to update their activity report for in person meeting this week. Jeans advised members they can enter the 24 hours a day attended the in-person meeting to report. Rosalia reminded members the importance of reporting and the impact it has on funding the TAP program. Miller clarified research on projects included in time reporting.

ICC Updates/Newsletter

Miller informed the members of the current project of the Speak Up brochure, reminded any member can attend ICC meetings. ICC is currently soliciting volunteers to take on the role as TAP Facebook administrators.

Chair Closing & Roundtable

Thompson stated it was great to meet everyone in person, confirmed if any additional thoughts, questions or improvements.

Closing

Jeans thanked everyone for joining and closed the meeting at 2:42 pm ET

The next monthly meeting June 13th at 11am ET

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