

MeF 101

State Steps toward Fed/State Modernized e-File Implementation

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Six Major Tasks

 Build Communication Gateway

 Data Elements/TIGERS

 Define Business Rules

 Develop Backend System

 Develop Viewing System

 Administrative Matter

1. Communication Gateway

- Gateway to/from IRS
- ICD
- Security
- Analysis of Receipt Pattern and Size

2. Data Elements/TIGERS

■ TIGERS Role

- Adding to Master Spreadsheets & Schemas
- Use existing elements
- Use State Agreed Upon Names
- Use existing eFile Types
- TIGERS Approval – Add/Change Policy

3. Define Business Rules

- Derive State Schema from Master Schema
- Document State Schema for Industry Use
- Business Rule Document - TIGERS Format
- Industry and ERO Manuals - TIGERS Format
- Working with Attachments

4. Develop Backend System

- Receiving Submission
- Parse Submission
- Move data to back-end processing systems
- Create Receipts and Acknowledgements

5. Develop Viewing System

- In-house Data Viewer
- Image of Paper Return
- View both State and IRS data

6. Administrative Matters

- MOU Requirements
- System ID
- Application Process

Lessons Learned

- **Managing Spreadsheets & Schemas** (website)
- **Review of spreadsheets** (boil-down and Swat Team)
- **Communications** (obstacles that were overcome)
- **Security** (the changing world)
- **Industry Documentation** (KS vs WI)

Website

www.statemef.com

■ Work Products,

- Change Control Process
- Spreadsheet Instructions
- Category & E-File Types – descriptions and pdf view

■ Guidance

- Standards
- Meetings
- MeF 101 for States

■ News

- Meetings
 - Announcements of spreadsheets & schemas

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