



Modernized e-File (MeF) Update

FTA Technology Conference

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AGENDA

- **Filing Season Recap**
- **Deployment Schedule**
- **Key Dates**
- **Communications**
- **Partnering Efforts**
- **Questions and Discussion**





Filing Season Recap

Week Ending 7-25-2010

Rollup	CY 2010 CUM Projected Receipts	CY 2010 CUM Actual Receipts	CY 2010 CUM % Actual vs Projected	CY 2009 CUM Actual Receipts	CUM Growth % 2010 vs 2009	2010 CUM Actual Paper Receipts	2010 CUM Accepted MeF and Paper Receipts	2010 CUM % MeF of Total Accepted
All MeF W/O IMF	4,432,514	4,947,131	11.61%	3,844,401	28.68%	9,221,128	14,168,259	34.92%
All MeF W/ IMF		5,925,392			54.13%			

Category	2010 CUM Projected Receipts	2010 CUM Actual Receipts	2010 CUM % Actual vs Projected	CY 2009 CUM Actual Receipts	CUM Growth % 2010 vs 2009	2010 CUM Scheduled Paper Receipts	2010 CUM Actual Paper Receipts	2010 CUM Accepted MeF and Paper Receipts	2010 CUM % MeF of Total Accepted
IMF		978,261							
BMF	4,087,345	4,478,863	9.58%	3,550,444	26.15%	9,090,023	8,430,632	12,909,495	34.69%
EO	328,870	444,595	35.19%	280,366	58.58%	410,785	399,616	844,211	52.66%
EXC	16,299	23,673	45.24%	13,591	74.18%	377,125	390,880	414,553	5.71%





1040 State Participation

- **16 States Participating:**

Colorado, Georgia, Idaho, Illinois (no volume yet), Indiana, Kansas, Louisiana, Michigan, Montana, Nebraska, Ohio, Oklahoma, Oregon, Rhode Island, Utah, Wisconsin

- **25 States not yet participating including DC:**

Alabama, Arizona, Arkansas, Connecticut, Delaware, District of Columbia, Hawaii, Iowa, Kentucky, Maine, Maryland, Minnesota, Mississippi, Missouri, New Hampshire, New Jersey, New Mexico, New York, North Carolina, North Dakota, Pennsylvania, South Carolina, Vermont, Virginia, West Virginia





Deployment Schedule*

- **Phase I – In Production**

- Form 1040 and 22 other forms/schedules:

Sch A	Sch E	Sch SE	2441	8812	8888
Sch B	Sch EIC	1099-R	4562	8829	W-2
Sch C	Sch M	2106	4868	8863	
Sch D	Sch R	2210	8283	8880	

- **Phase II – January 2011**

- Current TY 2010 (23 forms)
- Prior TY 2009 (23 forms)
- Code optimization and additional hardware

- **Phase III – January 2012**

- Approximately 125 additional forms/schedules
- Current TY 2011 (148+ forms)
- Prior TY 2010 and Prior TY 2009 (23 forms)

* The deployment schedule is subject to change base on agency priorities and budget allocation. IRS will notify external stakeholders as soon as possible if plans change.





Key Dates

- **Software Developer Testing**
 - MeF Assurance Testing System (ATS) – Target November 2010
 - Test scenarios shared with current 1040 e-file
 - No Answer Key provided in publications; e-Help Assistors will have it
 - e-Help support will be provided
 - Will be staffed to support MeF 1040 and current 1040 e-file
- **TY 2010 Schemas will be published at the earliest date possible**
- **MeF 1040 related publications will be posted to irs.gov:**
 - **Pub 1345:** Handbook for Authorized IRS e-file Providers of Individual Income Tax Returns – Target September 2010
 - **Pub 1436:** Test Package for Electronic Filers of Individual Tax Returns – Target September 2010
 - **Pub 4164:** Modernized e-File Guide for Software Developers and Transmitters – October 2010





Communications

- **MeF 1040 web pages on irs.gov**
 - Located on the 'Coming Soon to the MeF Program' page at <http://www.irs.gov/efile/article/0,,id=204750,00.html>
 - Contains links for:
 - Forms
 - Publications
 - Software Developers, States, and Practitioners
 - Benefits of MeF
 - Calendar of Events
- **Mailbox for MeF 1040**
 - Email Address: 1040mef@irs.gov
 - Questions on schemas or other technical issues concerning the program
 - Key questions/answers will be posted to irs.gov as frequently asked questions (FAQs)
- **MeF Status Page**
 - After implementation, refer to the status page for important updates at <http://www.irs.gov/efile/article/0,,id=168537,00.html>





Partnering Efforts

- **Calendar of Events is posted at**
<http://www.irs.gov/efile/article/0,,id=206086,00.html>
 - 1040 Executive Council meetings (monthly)
 - 1040 Working Group meetings (semi-annual. Target September 2010)
 - 1040 Working Group conference calls (monthly)
 - Schema walk-through conference calls (start date and frequency TBD)
- **Software Developers Conference – June 28 and 29, 2010**





Questions and Discussion

