



FTA bulletin

Federation of Tax Administrators
444 N. Capitol St., N.W., #348, Washington D.C., 20001 • (202) 624-5890

B-16/04
May 12, 2004

FTA 20TH ANNUAL TECHNOLOGY CONFERENCE AND EXHIBITION August 8-11, 2004 • Doubletree Hotel at Lloyd Center • Portland, Oregon

SUMMARY

The 20th Annual FTA Technology Conference and Exhibition will be held August 8-11, 2004, in Portland, Oregon, at the Doubletree Hotel at Lloyd Center. This announcement contains a preliminary program as well as registration materials and hotel information.

The **hotel registration deadline is July 16**. FTA suggests that you make your hotel arrangements early and also requests that you **complete your conference registration with us by July 16**. On-line registrations will be accepted at the FTA home page at www.taxadmin.org. Faxed registrations may be sent to (202) 624-7888.

PROGRAM FEATURES

Developments in e-file programs will again be featured this year, along with an emphasis on approaches to compliance and the states' continuing efforts to integrate revenue applications and "lessons learned." In addition information on other developing areas will be presented relating to fed-state corporate tax e-filing, tax jurisdiction sourcing, 2-D barcoding, the Streamlined Sales Tax Project, e-payments, software development tools, and data warehousing, among others.

EXHIBIT HALL

There will also be a vendor exhibit hall providing a concentrated opportunity to visit with private sector representatives about new products and services during show hours on Sunday, August 8, and Monday, August 9. A preliminary list of exhibitors for this year is attached; spaces are filling up fast!

FTA has again outsourced the management of our Exhibit Hall to an outstanding trade show firm in Annandale, VA, The Bridge Group. If you are a provider and would like to exhibit your products and services, please contact Cathy Arevian, Principal with The Bridge Group, at cathy@tbgevents.com or 703-425-1186.

EVENT SPONSORSHIP

This year we are featuring an expanded Sponsorship Program that provides the opportunity to support the FTA Technology Conference and Exhibition. There are our usual opportunities this year for industry to sponsor the main Conference functions (covering continental breakfasts,

coffee breaks, lunch, and the Sunday reception) as well as other new and additional modes of support including a cappuccino bar, ice cream breaks, the Cybercafe, and attendee goods (tote bags and lanyards). Some of these also feature additional vendor benefits such as free registrations and exhibit booths! A preliminary list of Conference Sponsors is included with this announcement.

For Sponsorship (and Exhibit) information, use this link to The Bridge Group: <http://www.tbgevents.com/trade-currentshows.html> or contact Cathy Arevian at cathy@tbgevents.com or 703-425-1186.

RELATED MEETINGS

Again this year there will be a meeting of the ASC X12/TIGERS Group at the conclusion of the Technology Conference, from 2:00 p.m. August 11 through noon on the 13th. This government/industry consensus group develops electronic standards and is now developing guidance on the use of eXtensible Markup Language (XML) for Tax Filing. For more information, see the [TIGERS XML Resource Page](#). There is a \$50 registration fee for the TIGERS meeting, and we ask that all preregister so that an accurate count can be made for hotel space planning purposes.

The National Association of Computerized Tax Processors will again hold its annual meeting August 11-13 in conjunction with the FTA Technology Conference, in the Doubletree Hotel at Lloyd Center. Contact Mimi Nolan at mnolan@hrblock.com for additional information.

For meeting logistics details, please contact Darrell Reeves at darrell.reeves@taxadmin.org. Meeting and exhibit information will also be provided on the FTA home page at www.taxadmin.org.

REGISTRATION

The Conference registration fee is \$325 for government delegates and \$475 for industry participants. This includes the opening Exhibit Hall reception on Sunday, continental breakfast Monday, Tuesday, and Wednesday, and the Monday Exhibit Hall luncheon. Please submit your registration by July 16. You may do so on-line at www.taxadmin.org.

Again, the FTA Conference registration deadline is July 16, 2004. A late fee of \$35 will be assessed if you fail to register before the workshop. Faxed registrations will be accepted at (202) 624-7888. If unable to make payment at the time of registration, registrants are asked to indicate payment method, including requests for invoicing. Checks will also be accepted on-site for payment. MasterCard or VISA is accepted; to pay by phone, call 202-624-5892, or you may also pay via on-line registration on the FTA Web site.

Cancellations. Cancellations are accepted without penalty if received by August 5; cancellations after that date (except emergencies) will incur a \$35 processing fee. On-site NEW registrants must add a \$35 fee.

HOTEL REGISTRATION

The conference will be held at the Doubletree Hotel at Lloyd Center, 1000 Multnomah NE, Portland, OR 97232. The hotel's direct line is 800-996-0510. FTA Group Rates are Government \$85/Industry \$105 single/double. When you make your reservations ask for the **Federation of Tax Administrators group rate and specify "government" or "industry."** Early registration

is urged, as the block tends to fill quickly. The cut-off date for hotel reservations is July 16; rooms may not be available after that date.

AIR TRANSPORTATION

Portland International Airport (PDX) is served by 17 international and domestic commercial airlines (among them Alaska, American, Delta, Northwest, Southwest and United) offering many arrivals and departures daily. Portland's excellent air service generally results in very competitive fares.

GROUND TRANSPORTATION AND PARKING

TriMet, Portland's public transportation provider, operates the MAX Red Line light rail service, running from Portland International Airport through downtown Portland every 15 minutes. A one-way trip from the airport to downtown Portland takes 38 minutes and costs \$1.60. Purchase tickets from automated ticket machines located in the airport lobby near baggage claim as well as on the MAX station platform. Taxi fare per vehicle typically runs \$20-25 one way to the hotel; travel time is 20-40 minutes to downtown. The hotel offers a reduced daily overnight parking rate of \$8 for FTA attendees.

CULTURE, WEATHER, EVENTS AND SUCH

The City of Portland has many attractions, including excellent museums (science, natural history, and art), theatre, ballet and opera, city hikes and tours, abundant golf and other outdoor recreation, and much more – and dining opportunities include the nation's largest variety of local microbrews. It also has an excellent local transportation system; the 38-mile network of rails extends to the airport and both east and west from downtown Portland and the Lloyd Center area. Buses, light rail and streetcars are free in a 330-square-block area. You may want to check for more information at: <http://www.pova.com/visitors/>. The hotel is just across the street from the Lloyd Center Mall, featuring over 200 stores, 18 movie theaters and an ice skating rink.

The Portland area is ranked as having one of the five best summer climates in America. The high and low range normally from 81 to 57 during August. Dress for the sessions will be business casual, meaning collared shirts and slacks for men but no ties.

FTA welcomes your suggestions for enhancements to the Conference, and hopes that you are able to attend. We look forward to seeing you there.

Sincerely,

Harley T. Duncan
Executive Director

Enclosures: as stated

2004 FTA TECHNOLOGY CONFERENCE
PARTIAL SPONSOR AND EXHIBITOR LIST

Sponsors

Accenture
AMS
Bank One
Bull Services
Deloitte Consulting
EZGov
Fast Enterprises
IBM
Imaging Business Machines, LLC
Microsoft
Revenue Solutions, Inc.
Scan-Optics, Inc.
Taxware
Teradata, a division of NCR
Trustfile
Unisys
Virtual Solutions

Exhibitors

Business Objects
Captiva
Dryden Matrix Technologies, LLC
FileYourTaxes.com
Fleet Libris Information Solutions
GovConnect, Inc.
Group 1 Software
Image Entry/SOURCECORP
ISSI
J & B Software
Kleindienst Corp.
Search Software America
SPSS
Tax Wise (UTS, Inc.)
Watch Systems
Wausau Financial Systems
Webco Printing Company
ZyTax, A Subsidiary of FuelQuest, Inc.



2004 FTA TECHNOLOGY CONFERENCE & EXHIBITION

August 8 – 11, 2004 • Portland, Oregon

REGISTRATION FORM

(Use separate form for each registrant or register on-line at www.taxadmin.org)

NAME: _____

TITLE: _____

AGENCY/COMPANY: _____

ADDRESS: _____

CITY: _____ **STATE:** _____ **ZIP:** _____

E-MAIL: _____ **PHONE:** _____ **FAX:** _____

REGISTRATION FEE:

____ (\$325) **GOVERNMENT:** General and Breakout Sessions and Exhibit -- Includes Sunday reception, continental breakfast each day, and lunch Monday.

____ (N/C) **SPONSOR:** *Please note: each sponsoring company is entitled to one (1) complimentary registration. Additional registrations are charged at the full rate listed below.* General and Breakout Sessions and Exhibit -- Includes Sunday reception, continental breakfast each day, and lunch Monday.

____ (N/C) **EXHIBITOR:** *Please note: each exhibiting company is entitled to one (1) complimentary registration. Additional registrations are charged at the full rate listed below.* General and Breakout Sessions and Exhibit -- Includes Sunday reception, continental breakfast each day, and lunch Monday.

____ (N/C) **EXHIBIT ONLY:** *Please note: these badges are for company employees who will be working the booth ONLY. They do not include admission to the* General and Breakout Sessions, the Sunday reception, continental breakfast each day, lunch Monday.

Please use space following this form to submit names for these badges. Limit 4 people per 10 x 10 booth.

____ (\$475) **INDUSTRY:** General and Breakout Sessions and Exhibit -- Includes Sunday reception, continental breakfast each day, and lunch Monday.

____ (\$50) **TIGERS Task Group Only** - August 11-13, 2004

PAYMENT METHOD (Select one):

Payment will be made at registration at the event

Payment will be made by voucher/purchase order

Payment is enclosed

Check

VISA

MasterCard

Name as it appears on card _____

Account Number _____

Expiration Date _____

Signature _____

Date _____

IMPORTANT: To plan accurately, we need to know if you will be attending:

Sun. Reception

Mon. Lunch

REGISTRATION DEADLINE IS July 16, 2004

NOTE: An additional \$35 fee is assessed for all on-site registrants who have not notified FTA in advance of their intent to attend. Cancellations after July 30, 2004 (except for emergencies) will be assessed a \$35 processing fee.

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EXHIBIT ONLY BADGE INFORMATION (For personnel working your exhibit booth - for additional information, please see notes above):

Name 1: _____

Name 2: _____

Name 3: _____

Name 4: _____

<p align="center">Please send checks and this form to: Federation of Tax Administrators 444 N. Capitol Street, NW, Suite 348, Washington, DC 20001 Phone: (202) 624-5892 FAX: (202) 624-7888</p> <p align="center">Make checks payable to: Federation of Tax Administrators and indicate payment is for Technology Conference (FTA Federal ID #36-2327263)</p>

Tuesday, August 10

7:30 am – 8:30 am Continental Breakfast

Session Breakouts

	<u>One</u>	<u>Two</u>	<u>Three</u>	<u>Four</u>
8:30 am – 9:30 am	Fed-State Employment Tax Update on Progress - <i>Susan Dunn, Paycycle and Panel</i>	Channel Management at the Wisconsin DOR - <i>Oscar Anderson, Wisconsin</i>	Assessing Retailer Sales Tax Compliance - <i>Michael McDevitt, Dryden Matrix Technologies</i>	New 2-D Forms Processing Technologies - <i>Mitzi Crump, Missouri</i>
9:45 am – 10:45 am	Enhancements to Washington State E-Filing - <i>Janetta Taylor, Washington</i>	Role of Technology and Work Process in Agency Data Capture - <i>Jerry Coble and Mary Scro, North Carolina</i>	Compliance Data Warehousing - <i>John Bace, Revenue Solutions</i>	Use of 2-D Barcoding by IRS for Form 941 and Schedule K-1s - <i>Victor Martin, IRS</i>
11:00 am – Noon	California BOE Internet Fuel Tax E-File - <i>Paul Spencer, VIP, Inc.</i>	Developing a Low-Cost Tax Jurisdiction Sourcing Database - <i>Tim Blevins, Kansas</i>	Audit Case Management Employing SAP - <i>Beth Sisson, Deloitte</i>	Current Progress on 2006 Fed-State 1120 E-File Program - <i>IRS and State Panel</i>

Noon – 1:30 pm Lunch - On Your Own

Session Breakouts

	<u>One</u>	<u>Two</u>	<u>Three</u>	<u>Four</u>
1:30 pm – 2:30 pm	When the Lights Go Out, Will the Phones Still Work?: IP Telephony Implementation - <i>Representative, Minnesota</i>	A Practical Approach to IT Migration Strategy - <i>Nonie Manion, Unisys</i>	State E-File Mandates - <i>Panel</i>	State Forms Coordinator Session - Government Only
2:45 pm – 3:45 pm	Extending Customer Self-Service Capabilities Using Enabling Web Technologies - <i>Chris Marakas, Revenue Solutions</i>	IT Governance in Tax Administration Organizations - <i>Stan McClain, Oregon</i>	Beyond the Lockbox: Commercial Best Practices for Form Processing - <i>Lori Nelson, Bank One</i>	State Forms Coordinator Session - Government Only
4:00 pm – 5:00 pm	SSTP Update/New Opportunities for Compliance Efficiencies - <i>Charles Collins, Taxware</i>	Managing Technology Projects - <i>Representative, Minnesota, and State Panel</i>	Improving the Tax Software Approval Process - <i>Representative, Arizona</i>	State Forms Coordinator Session - Government Only

Wednesday, August 11
(NOTE: NACTP Also Meets
August 11-13)

7:30 am – 8:30 am Continental Breakfast

Session Breakouts

	<u>One</u>	<u>Two</u>	<u>Three</u>	<u>Four</u>
8:30 am – 9:30 am	New Technologies Used in Re-engineering a 30-Year-Old Individual Income Tax System - <i>Representative, Minnesota</i>	Growing Into Your Data Warehouse - <i>Alison Torres, NCR</i>	Assuring the Success of Your On-line Tax Filing Initiative - <i>George Mori, EZGov</i>	Challenges in Data Matching in Taxpayer Inquiry and Tax Discovery and Investigation - <i>Ramesh Menon, Search Software America</i>
9:45 am – 10:45 am	Montana's Integrated Revenue Information System - <i>Don Hoffman, Montana</i>	Review of Tax Jurisdiction Sourcing Databases - <i>Bob Meador, Group 1</i>	Q-Matic for Improved Customer Service - <i>Linda Dollens, IN</i>	Java Development - Why It's So Difficult - <i>Representative, Minnesota</i>
11:00 am – Noon	BRITS - Arizona's New Integrated Tax System - <i>Representative, Arizona</i>	TBA	(GOVERNMENT ONLY) Modernizing the IRS-State Data Exchange Program - <i>Rod Sterling, IRS</i>	Web Services Using Microsoft .NET - <i>Guy Kirtley, Accenture</i>

**CONFERENCE
CLOSE**

2:00 pm – 5:00 pm **ASC X12 / TIGERS Tax Information Task Group – XML Standards**

[agenda to be added, to cover XML developments in SSTP, Fed-State Corporate 1120, Fed-State Employment, motor fuel taxes, and other matters]

Thursday, August 12

9:00 am – 5:00 pm **ASC X12 / TIGERS Work Sessions [continued] – XML Standards**

Friday, August 13

9:00 am – 12 Noon **ASC X12 / TIGERS Work Sessions (continued) – XML Standards**