

Federation of Tax Administrators

20TH ANNUAL TECHNOLOGY CONFERENCE AND EXHIBITION



**August 8-11, 2004
Portland, Oregon**

Layout of Doubletree Hotel

Welcome

Welcome to the 20th Annual FTA Technology Conference and Exhibition. We are again providing our annual opportunity for government revenue professionals, service providers, and taxpayer representatives to gather together and learn about new initiatives, discuss issues of interest, and get information on new products and services in the tax and revenue marketplace.

The conference this year features a full agenda of sessions on new initiatives of government tax authorities, descriptions of technology applications and standards, and remarks by industry providers on a variety of topics important to the tax administration community during this time of continued budget challenges.

Our Exhibit Hall, where the Sunday evening reception and Monday breakfast and lunch functions will take place, contains a wealth of information about potentially valuable services to you. The Exhibit Hall will be open on Sunday 5-8 p.m. and continuously on Monday from 7:30 a.m. to 1:30 p.m. We wish to thank our constantly expanding roster of Sponsors and Exhibitors for their significant support.

We also wish to welcome the members of the National Association of Computerized Tax Processors (NACTP), which for the tenth year has co-located its annual meeting with FTA during the latter half of the week here in the Doubletree. In addition, some of you are attending the ASC X12/TIGERS working group meeting later this week, which will address agreement on jointly-developed XML-based state and federal electronic commerce standards for corporate, employment and sales taxes that are important to all tax agencies and their partners.

Thanks to all of our speakers for their willingness to share their time and expertise, and we would like to extend our special thanks to the executive office of the Oregon Department of Revenue for its assistance.

As always, we hope this year's FTA Annual Technology Conference and Exhibition assists you in your new technology efforts and that you find the time to enjoy the many and varied attractions of Portland.

Harley T. Duncan
FTA Executive Director

FTA 2004 Technology Conference Sponsors and Exhibitors

<u>Exhibitor</u>	<u>Booth #</u>	<u>Type of Sponsorship</u>
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Watch Systems	309	
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(Exhibit Hall Booth Layout)

DAY AT A GLANCE

Sunday, August 8, 2004

- Noon – 5:00 p.m. Vendor Setup ONLY – *Exhibit Hall*
- 3:00 p.m. – 7:00 p.m. Conference and Exhibitor Registration – *Holladay Foyer*
Cappuccino Bar sponsored by: Unisys
- 5:00 p.m. – 8:00 p.m. Opening Reception and Exhibits – *Exhibit Hall*
Reception co-sponsored by:
CGI-AMS
Deloitte Consulting

Monday, August 9, 2004

- 7:30 a.m. – 5:00 p.m. Conference Registration – *Holladay Foyer*
- 7:30 a.m. – 8:30 a.m. Continental Breakfast and Exhibit – *Exhibit Hall*
Breakfast co-sponsored by:
Accenture
Revenue Solutions, Inc.
Teradata, a division of NCR
- 8:30 a.m. – 9:45 a.m. GENERAL SESSION - *Multnomah / Holladay*
- 10:00 a.m. – 11:00 a.m. CONCURRENT SESSIONS
Session 1 *Broadway / Weidler / Halsey*
Session 2 *Mt. Bachelor / 3 Sisters*
Session 3 *Mt. Hood / Mt. St. Helens*
Session 4 *Pacific Northwest Ballroom*
- 11:00 a.m. – 1:30 p.m. Lunch and Vendor Exhibits – *Exhibit Hall*
Lunch co-sponsored by:
Fast Enterprises, LLC
IBM
- 2:00 P.M. – 6:00 P.M. EXHIBIT TEARDOWN
- 1:30 p.m. – 5:00 p.m. CONCURRENT SESSIONS
Session 1 *Broadway / Weidler / Halsey*
Session 2 *Mt. Bachelor / 3 Sisters*
Session 3 *Mt. Hood / Mt. St. Helens*
Session 4 *Pacific Northwest Ballroom*
Break co-sponsored by:
Bull
Imaging Business Machines, LLC
- 6:00 p.m. – 8:00 p.m. Reception Hosted by Sponsors – *Multnomah / Holladay*

Schedule for Monday, August 9, 2004

- 7:30 a.m. – 5:00 p.m. Conference Registration – *Holladay Foyer*
- 7:30 a.m. – 8:30 a.m. Continental Breakfast and Exhibits – *Exhibit Hall*

Breakfast co-sponsored by:

Accenture

Revenue Solutions, Inc.

Teradata, a division of NCR

- 8:30 a.m. – 9:45 a.m. General Session – *Multnomah / Holladay*

Introduction

Jonathan Lyon, Federation of Tax Administrators

Welcome to Oregon

Elizabeth Harchenko, Director, Oregon Dept. of Revenue

Keynote

Unlocking the Power of Intellectual Assets

Vince Kasten, Unisys

- 10:00 a.m. – 11:00 a.m. CONCURRENT SESSIONS

SESSION 1 *Broadway / Weidler / Halsey*

**Reengineering the Florida Department of Revenue:
The Directive Perspective**

James A. Zingale, Executive Director, Florida

SESSION 2 *Mt. Bachelor / 3 Sisters*

Legal Update on Computer Security: A Forecast

Ben Wright, Attorney At Law

SESSION 3 *Mt. Hood / Mt. St. Helens*

E-Service Innovations in the IRS

Loretta Letke, Unisys

SESSION 4 *Pacific Northwest Ballroom*

**E-Government Research: Using Online Services to
Encourage Compliance**

Ann Rettie, Accenture

11:00 a.m. – 1:30 p.m. Lunch and Vendor Exhibits – *Exhibit Hall*
(Exhibit teardown at 2 p.m.)

Lunch co-sponsored by:
Fast Enterprises LLC
IBM

1:30 p.m. – 2:30 p.m. CONCURRENT SESSIONS

SESSION 1 *Broadway / Weidler / Halsey*
E-File, Texas Style
Debbie Peterson, Texas

SESSION 2 *Mt. Bachelor / 3 Sisters*
Growing Into Your Data Warehouse
Alison Torres, NCR

SESSION 3 *Mt. Hood / Mt. St. Helens*
XML Standards Development Update
Terry Garber, South Carolina

SESSION 4 *Pacific Northwest Ballroom*
**Our Business/IT Partnership in Development of the
Taxpayer Assistance and Collections Center**
Charlie Helms and Mary Scro, North Carolina

Break co-sponsored by:
Bull
Imaging Business Machines, LLC

2:45 p.m. – 3:45 p.m. CONCURRENT SESSIONS

SESSION 1 *Broadway / Weidler / Halsey*
Sales and Use Web Filing in Arizona
Tom Waters, Arizona

SESSION 2 *Mt. Bachelor / 3 Sisters*
E-Payments and the Future Color of Money
Lori Nelson, JPMorgan

SESSION 3 *Mt. Hood / Mt. St. Helens*
Working with Third-Party Service Providers on E-Filing
King Woolf, Trustfile

SESSION 4 *Pacific Northwest Ballroom*
**GPS, Route Optimization and Management Reporting in
Wireless Collections**
Albert Perez, Texas, and Eli Castro, Adea Solutions

4:00 p.m. – 5:00 pm

CONCURRENT SESSIONS

SESSION 1 *Broadway / Weidler / Halsey*
Individual Income Tax Web Filing: Our Experience and Why We Killed It

Cynthia Rowley and Greg Tschida, Minnesota

SESSION 2 *Mt. Bachelor / 3 Sisters*
Review of Tax Jurisdiction Sourcing Databases
Bob Meador, Group 1 Software

SESSION 3 *Mt. Hood / Mt. St. Helens*
FTA-IRS Tactical Advisory Group Update
Kevin Richards, Illinois, and Terry Garber, South Carolina

SESSION 4 *Pacific Northwest Ballroom*
The Next Generation: Management of Outside Collection Agencies
Stefan Becker and Jim Hale, CGI-AMS

6:00 p.m. – 8:00 pm

RECEPTION (*Multnomah/Holladay*)

☞ **HOSTED BY** ☞

Accenture

IBM

CGI-AMS

Microsoft

Deloitte Consulting

Scan-Optics, Inc.

Fast Enterprises LLC

Virtual Solutions, Inc.

Join your hosts for a relaxing evening of Pacific Northwest microbrews and wines paired with regional food specialties. Tap your feet to music by local crooner Johnny Martin and enter the drawing for great door prizes while you're there!

DAY AT A GLANCE

Tuesday, August 10, 2004

7:30 a.m. – 2:00 p.m. Conference Registration – *Holladay Foyer*

7:30 a.m. – 8:30 a.m. Continental Breakfast – *Holladay Foyer*

Breakfast co-sponsored by:
Business Objects
Scan-Optics, Inc.
Trustfile

8:30 a.m. – Noon CONCURRENT SESSIONS

Session 1 *Broadway / Weidler / Halsey*
Session 2 *Mt. Bachelor / 3 Sisters*
Session 3 *Mt. Hood / Mt. St. Helens*
Session 4 *Pacific Northwest Ballroom*

AM Break co-sponsored by:
EzGov, Inc.
JPMorgan

Noon – 1:30 p.m. Lunch (on your own)

1:30 p.m. – 5:00 p.m. CONCURRENT SESSIONS

Session 1 *Broadway / Weidler / Halsey*
Session 2 *Mt. Bachelor / 3 Sisters*
Session 3 *Mt. Hood / Mt. St. Helens*
Session 4 *Pacific Northwest Ballroom*

PM Break co-sponsored by:
Taxware
Unisys

Schedule for Tuesday, August 10, 2004

7:30 a.m. – 2:00 p.m. Conference Registration – *Holladay Foyer*

7:30 a.m. – 8:30 a.m. Continental Breakfast – *Holladay Foyer*

Breakfast co-sponsored by:
Business Objects
Scan-Optics, Inc.
Trustfile

8:30 a.m. – 9:30 a.m. CONCURRENT SESSIONS

SESSION 1 *Broadway / Weidler / Halsey*
Fed-State Employment Tax: Update on Progress
Susan Dunn, Paycycle; Kevin Richards, Illinois; Steve Veilleux
and David Lepri, Connecticut

SESSION 2 *Mt. Bachelor / 3 Sisters*
Channel Management at the Wisconsin DOR
Oskar Anderson, Ellen Hefty, Amy Boutelle, Wisconsin

SESSION 3 *Mt. Hood / Mt. St. Helens*
Assessing Retailer Sales Tax Compliance
Robert Shickora, New Jersey; Kevin Johnson and Michael
McDevitt, Tax Matrix Technologies, LLC

SESSION 4 *Pacific Northwest Ballroom*
New 2-D Forms Processing Technologies
Mitzi Crump, Missouri

AM Break co-sponsored by:
EzGov, Inc.
JPMorgan

9:45 a.m. – 10:45 a.m. CONCURRENT SESSIONS

SESSION 1 *Broadway / Weidler / Halsey*
Enhancements to Washington State E-Filing
Debra Young and James Petit, Washington

SESSION 2 *Mt. Bachelor / 3 Sisters*
**Role of Technology and Work Process in Agency Data
Capture**
Jerry Coble and Mary Scro, North Carolina

SESSION 3 *Mt. Hood / Mt. St. Helens*
Compliance Data Warehousing
John Bace, Revenue Solutions

SESSION 4 *Pacific Northwest Ballroom*
Use of 2-D Barcoding by IRS for Form 941 and Schedule K-1s
Victor Martin, IRS

11:00 am – Noon

CONCURRENT SESSIONS

SESSION 1 *Broadway / Weidler / Halsey*
California BOE Internet Fuel Tax E-File
Paul Spencer, VIP, Inc.

SESSION 2 *Mt. Bachelor / 3 Sisters*
Kansas Payments Portal
Gary Centlivre, Kansas

SESSION 3 *Mt. Hood / Mt. St. Helens*
Audit Case Management Employing SAP
Barbara McKibben, Florida, and John Rampulla, Deloitte

SESSION 4 *Pacific Northwest Ballroom*
Current Progress on 2006 Fed-State 1120 E-File Program
Joan Barr, IRS, and Terry Garber, South Carolina

Noon – 1:30 pm

Lunch (on your own)

1:30 p.m. – 2:30 p.m.

CONCURRENT SESSIONS

SESSION 1 *Broadway / Weidler / Halsey*
**When the Lights Go Out, Will the Phones Still Work?:
IP Telephony Implementation**
Lee Ho, Minnesota

SESSION 2 *Mt. Bachelor / 3 Sisters*
Sixteen Years of Integrated Tax, Sixteen Lessons Learned
Chuck Adelman, Unisys

SESSION 3 *Mt. Hood / Mt. St. Helens*
State E-File Mandates
Cheryl Sullivan, Wisconsin, and Dick Eppleman, Vertex

SESSION 4 (**GOVT. ONLY**) *Pacific Northwest Ballroom*
State Forms Coordinator Session
Mitzi Crump, Missouri, Moderator

PM Break co-sponsored by:
Taxware
Unisys

2:45 p.m. – 3:45 p.m.

CONCURRENT SESSIONS

SESSION 1 *Broadway / Weidler / Halsey*
**Extending Customer Self-Service Capabilities Using
Enabling Web Technologies**
Chris Marakas, Revenue Solutions

SESSION 2 *Mt. Bachelor / 3 Sisters*
IT Governance in Tax Administration Organizations
Stan McClain and Katherine Hancock, Oregon

SESSION 3 *Mt. Hood / Mt. St. Helens*
**Beyond the Lockbox: Commercial Best Practices for Form
Processing**
Lori Nelson, JPMorgan

SESSION 4 **(GOVT. ONLY)** *Pacific Northwest Ballroom*
State Forms Coordinator Session (contd.)
Mitzi Crump, Missouri, Moderator

4:00 p.m. – 5:00 p.m.

CONCURRENT SESSIONS

SESSION 1 *Broadway / Weidler / Halsey*
**SSTP Update/New Opportunities for Compliance
Efficiencies**
Charles Collins, Taxware

SESSION 2 *Mt. Bachelor / 3 Sisters*
Managing Technology Projects
Greg Tschida, Minnesota; Jim Evers, Florida; Sue Tilley and
Bob Cook-Abbott, Ontario Ministry of Finance

SESSION 3 *Mt. Hood / Mt. St. Helens*
Improving the Tax Software Approval Process
Donna Muccilli, Arizona

SESSION 4 **GOVT. ONLY)** *Pacific Northwest Ballroom*
State Forms Coordinator Session (contd.)
Mitzi Crump, Missouri, Moderator

DAY AT A GLANCE

Wednesday, August 11, 2004

7:30 a.m. – 8:30 a.m. Continental Breakfast – *Holladay Foyer*

***Breakfast co-sponsored by:
ADOBE Systems, Inc.
Dun and Bradstreet
Vertex, Inc.
Virtual Solutions, Inc.***

8:30 a.m. – Noon CONCURRENT SESSIONS

Session 1 *Multnomah*
Session 2 *Holladay*
Session 3 *3 Sisters*
Session 4 *Mt. Bachelor*

***Break sponsored by:
Microsoft***

[FTA TECHNOLOGY CONFERENCE CLOSE]

2:00 p.m. – 5:00 p.m. XML Standards Working Meeting – Tax Information Group
for EC Requirements Standardization (TIGERS) – *Mt. Bachelor*

Schedule for Wednesday, August 11, 2004
(NOTE: NACTP also meets August 11-13)

7:30 a.m. – 8:30 a.m. Continental Breakfast – *Holladay Foyer*

Breakfast co-sponsored by:
ADOBE Systems, Inc.
Dun and Bradstreet
Vertex, Inc.
Virtual Solutions, Inc.

8:30 a.m. – 9:30 a.m. CONCURRENT SESSIONS

SESSION 1 *Multnomah*
New Technologies Used in Reengineering a 30-Year-Old Individual Income Tax System
Don Friedlander and Greg Tschida, Minnesota

SESSION 2 *Holladay*
Developing a Tax Jurisdiction Sourcing Database
Tim Blevins, Kansas

SESSION 3 *3 Sisters*
Assuring the Success of Your Online Tax Filing Initiative
George Mori, EzGov

SESSION 4 *Mt. Bachelor*
Challenges in Data Matching in Taxpayer Inquiry and Tax Discovery and Investigation
Ramesh Menon, Search Software America

Break sponsored by:
Microsoft

9:45 a.m. – 10:45 a.m. CONCURRENT SESSIONS

SESSION 1 *Multnomah*
Montana's Integrated Revenue Information System
Don Hoffman, Montana

SESSION 2 *Holladay*
Employer Income Tax Withholding: Fewer Returns, Better Results
Doreen Warren, Idaho

SESSION 3 *3 Sisters*
IN.Q for Improved Customer Service
Kathy Klinkose, Indiana

SESSION 4 *Mt. Bachelor*
Java Development: Why It's So Difficult
Don Friedlander, Minnesota

11:00 a.m. – Noon

CONCURRENT SESSIONS

SESSION 1 *Multnomah*
Common Misconceptions About Benefits-Funded Projects
Ted London and John Vranna, CGI-AMS

SESSION 2 *Holladay*
Using Standards to Increase Your e-Program Participation
Stephen Bouchard, Maryland, and Lisa Miller, Washington
Publishing Company

SESSION 3 **(GOVT. ONLY)** *3 Sisters*
Modernizing the IRS-State Data Exchange Program
Rod Sterling, IRS

SESSION 4 *Mt. Bachelor*
Web Services Using Microsoft .NET
Guy Kirtley, Accenture

CONFERENCE CLOSE

Schedule for TIGERS Meeting

Wednesday, August 11, 2004

2:00 p.m. – 5:00 p.m.

ASC X12/TIGERS Tax Information Task Group – XML Standards – *Mt. Bachelor*

Federal-State 1120

- Review “Packaging” Schema Draft
- Final Spreadsheet Implications for Schemas

SSTP Rates and Boundaries Database (Tax Jurisdiction Sourcing)

- Discussion on Database Implementation

Motor Fuel Tax

- Uniformity Committee Draft XML Schema

Thursday, August 12, 2004

9:00 a.m. – 5:00 p.m.

ASC X12/TIGERS Work Sessions – XML Standards – *Mt. Bachelor*

Federal-State 1120

- State Business Rules
 - What are They?
 - How Enforced (Schema vs. Backend)
 - How Conveyed (Templates)
 - Central Location
- Acks and Error Codes
- Change Control and Versioning
 - Master Spreadsheet/Schemas
 - State Schemas

Fed/State Employment Taxes (FSET)

- Implementation Updates
- Change Requests
- W-2 Schemas

UI Separation Information Data Exchange

- Status
- TIGERS’ Role

Friday, August 13, 2004

9:00 a.m. – Noon

ASC X12/TIGERS Work Sessions – XML Standards
– Mt. Bachelor

Streamlined Sales Tax Project

- Long Path Registration
- Rates and Boundaries
 - Uniform Queries
 - XML Implications
- Change Requests
- RFP Status
- Long Path Filing Schema

Notes

Notes

Notes

You are Invited!
to the
2005 FTA Technology Conference

August 7-10, 2005
Hyatt Regency Columbus
Columbus, Ohio

FTA Home Page:
www.taxadmin.org
for meeting information
... and much more ...

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Sign up for TaxExchange, the extranet
for state tax agencies
www.taxexchange.org/reg

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