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e-file for Business Returns

May 18, 2004

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Internal Revenue Service



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1065, 1041, 94X e-file

- Partnership Returns, Form 1065
- Trusts & Estates, form 1041
- Employment Tax, Form 94X



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Estate and Partnership Returns e-file Statistics April 30, 2004

	Returns	K-1s
Form 1041	1,300,440	1,550,136
Form 1065	75,390	919,154



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Employment Tax e-file Statistics May 3, 2004

	Form 940	Form 941
XML	61,069	126,399
Non-XML		465,161
On-line		1,153
Total	61,069	592,713



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Modernized e-File

- Exempt Organizations, Form 990
- Corporate Returns, Forms 1120/1120S



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Modernized e-File What is it?

- IRS implemented MeF on February 23, 2004 for forms 1120/1120S, 990, 990EZ and 8868
 - New Architecture
 - New data format (XML)



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Modernized e-File Benefits

- Transaction based – Eliminated Drains
- Universal description of common forms – Share 50 forms with 1040, 1065 and 1041
- Redesigned and standardized rejects
- Fast return of acknowledgements
- Completely Paperless – will accept scanned documents
- Internet filing in addition to modem and leased line



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1120 Statistics May 9, 2004

	LMSB	SBSE	Total
Form 1120	25	6,113	6,138
Form 1120S	153	25,575	25,728
Total	178	31,688	31,866



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1120 Statistics May 9, 2004

	Accepted Returns	Projected Returns	% Projection
Form 1120	6,138	9,400	65%
Form 1120S	25,728	14,200	181%



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Exempt Organization Statistics

	Accepted Returns	Projections
Form 990	24	300
Form 990EZ	62	100
Form 1120POL	1	0
Form 8868	69	400



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ERO Participation

Returns	Number of EROs 1120	Number of EROs TEGE
100+	40	
51 – 99	90	
26 – 50	183	1
11 – 25	444	
1-10	1,591	26



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Other MeF Statistics

- 6 software developers transmitting
 - 2 currently in testing
- Practitioner PIN
 - 1120 – 98%
 - 990 – 32%
- 103 payments (1120) = \$222.368



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Other MeF Statistics

- **27 of 53 Release 1 Forms (1120) have been filed**
 - High Use Forms - 4562, 4797, 8824, 8825, Sch D (1120S), Sch K-1 (1120S)
- **Highest District volumes (1120)**
 - Detroit = 11,074



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EMS Transmission Issues

- **Largest transmission**
 - Turnaround time for Acknowledgment
 - Number of returns
 - Transmission size
- **Average transmission**
 - Turnaround time for Acknowledgment
 - Number of returns
 - Transmission size
 - Average return size
- **EMS – feedback from group**



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Internet Filing

- Number of returns
- Feedback on Internet Filing



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Implementation Schedule

- **February 23, 2004 – Release 1**
 - 53 Forms and Schedule
- **July 2004 – Release 2**
 - 44 Forms and Schedules
- **January 2006 – Fed/State**



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Fed/State

- **May 2003 – Tactical Advisory Group (TAG) established a sub-group to gather high level requirements**
- **Seven states participated (CA, IL, MD, MI, NY, SC, VA)**
- **June – July 2003 - Sub-group identified seven issues and formed mini teams to define/clarify requirements**
 - **Transmission**
 - **Authentication**
 - **Acknowledgments**
 - **Payments**
 - **Due Dates**
 - **Disclosure**
 - **Validation/Rejection**
 - **Testing**



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Fed/State

- **September 2003 - FTA sent survey to all states requesting**
 - **agreement on the 8 high-level business requirements**
 - **when states planned to implement.**
 - **11 States respond saying they would implement in 2005**
- **October 2003 – TAG accepted high level requirements.**
 - **Established a Deployment Team to further define requirements.**
 - **Approximately 20 states agreed to participate in Deployment Team**
 - **Agreed technical issues would be worked through TIGERS**
- **February 2004 - TIGERS team needs input from software developers**



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Modernized e-File To find out more

GO TO

www.irs.gov

**CLICK – IRS e-File for Business –
Software Developers/Transmitters**

CLICK – 1120/1120S



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Modernized e-File Contacts

- Send email to: 1120@irs.gov
- For Fed/State Issues contact:
 - Send email to: sylvia.c.berry@irs.gov



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Other e-File Program Contacts

- 1065 - Edward.A.Dickerson@irs.gov
- 1041 - wiform1041@irs.gov
- 94x XML – e-fileemptax@irs.gov

94x XML Fed/State Employment Tax Mailbox:

wi.fedstateschema@irs.gov

(Contact for Fed/State Issues Only)