

FTA
2009 Annual Meeting

***Modernized e-File
(MeF) Update***

presented by
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AGENDA

- **Filing Season Status**
- **Form 1040 MeF**
 - Deployment Schedule
 - Transition Plans
 - Key Dates
 - Communications
 - Partnering Efforts



MeF Today

- Currently provides electronic filing and payment options for businesses
- Receives and processes returns in an internet environment
- Provides real-time processing of acknowledgements, streamlined error-detection, and standardization of business rules
- Capability to attach PDF files

MeF Forms		
Corporations	1120, 1120S 1120-F	(2004) (2008)
Exempt Organizations	990, 990EZ, 990PF, 1120POL 990-N (e-postcard)	(2004) (2008)
Partnerships	1065, 1065-B	(2007)
Excise Tax	2290, 720, 8849	(2007)
Extensions	7004 8868	(2005) (2004)



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Processing Year 2009 Statistics as of May 7, 2009

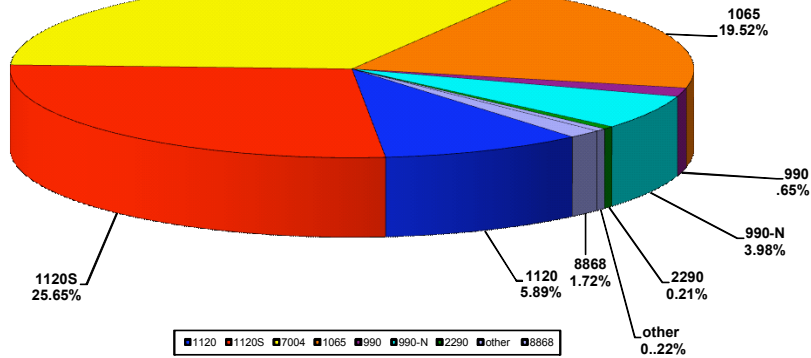
Total MeF volume – 3,448,505 **139%** of the total volume this day in 2008

Form	2009 Accepted Returns	2008 Accepted Returns	% Increase of 2008 Volume
1120	201,175	149,050	35%
1120S	901,044	633,978	42%
1120F	200	14	1329%
7004	1,499,197	1,089,117	38%
1065/1065-B	688,773	490,038	41%
990/990EZ/N/PF	128,291	96,603	33%
8868	22,289	12,493	78%
2290	7,269	2,606	1789%
720/8849	253	5	4960%



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Returns by Form Type as of May 7, 2009



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Fed/State Returns as of May 7, 2009

595,742 State submissions (362,514 Corporate state returns and 233,228 Partnership state returns)
as compared to 121,617 total state returns for the same period in 2008

State	Total State Returns Made Available	Fed/State Made Available	State Standalone Made Available
ALST	10,253	3,677	6,576
COST	921	384	537
FLST	2,972	2,972	0
GAST	39,717	13,393	26,423
IDST	8,151	3,000	5,151
KSST	21,445	7,692	13,753
MDST	32,233	13,991	18,242
MIST	21,229	16,759	4,470
MOST	9,126	2,120	7,006
MTST	658	71	587
NYCT	559	24	535
NYST	353,788	77,528	276,260
ORST	6,301	1,563	4,738
PAST	17,135	6,175	10,960
SCST	17,581	6,608	10,973
UTST	3,071	6	3,065
WIST	50,602	22,463	28,139
Total:	595,742	178,426	417,316



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Form 1040 MeF Update



Deployment Schedule

- **Phase I – January 2010**

Form 1040 and EE 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 (<i>new</i>)	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)



Transition Plans

- **Volume Management Strategy**

- Strategy being developed in collaboration with MeF stakeholders
- Will implement a volume ramp-up plan
 - Ramp-up schedule will be determined in advance
 - Will ramp-up the daily volume percentage as scheduled, based on successful system performance
- Technical Support will be provided (including daily conference calls)

- **e-File Application**

- e-file Application has been updated to add “1040 MeF Internet, XML” as a transmission method for Form 1040
- EROs currently participating in 1040 Legacy e-file will be automatically enrolled in 1040 MeF
- **States**
 - **Currently participating in MeF will not need to revise their application**
 - **Not currently participating in MeF will have to file an application for the MeF program**
- Software Developers/Transmitters will need to update their application to indicate participation in the 1040 MeF Program



Key Dates

- **Software Developer Testing**

- MeF Assurance Testing System (ATS) – November 2, 2009
- Three test scenarios shared with current 1040 e-file
- e-Help Support will be staffed for 1040 MeF and current 1040 e-file

- **Schemas and Business Rules will be posted to irs.gov**

- Final TY 2008 schemas and business rules - May 2009
- Initial TY 2009 schemas - June 11, 2009
- All subsequent packages – by August 2009

- **MeF 1040-related publications will be posted to irs.gov**

- Pub 1345 Handbook for Authorized IRS e-file *Providers of Individual Income Tax Returns* – September 2009
- Pub 1436 Test Package for Electronic Filers of Individual Tax Returns – September 2009
- Pub 4164 Modernized e-File Guide for Software Developers and Transmitters – October 2009



Communications

- **MeF 1040 web pages on irs.gov**

<http://www.irs.gov/efile/article/0,,id=204750,00.html>

- Contains links for:
 - Forms (Phase I)
 - 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>



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Partnering Efforts

- **Calendar of Events for the remainder of 2009 is posted to**

<http://www.irs.gov/efile/article/0,,id=206086,00.html>

- 1040 MeF Executive Council meetings (monthly)
- 1040 MeF Working Group
 - Face-to-Face Meetings (semi-annual)
 - Next meeting tentatively scheduled for September 2009
 - Conference calls (monthly)
- 1040 MeF Schema conference calls (semi-monthly)
- **Federation of Tax Administrators (FTA) TIGERS Group**
 - Continue collaboration during quarterly meetings
- **Software Developers Conference – June 8 - 9, 2009**



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