

DAY AT A GLANCE

Sunday, May 15, 2005

3:00 p.m. – 6:00 p.m. **Registration** (*Piedmont*)

3:00 p.m. – 5:00 p.m. **State E-file Coordinator Meeting** (*Chastain Room, 25th Floor*)
Government Only

Monday, May 16, 2005

7:30 a.m. **Registration** (*Piedmont*)

7:30 a.m. **Continental Breakfast** (*Atlanta Ballroom C & D*)

8:30 a.m. – 5:00 p.m. **General Session** (*Atlanta Ballroom A & B*)

Noon – 1:30 p.m. **Lunch (on your own)**

5:30 p.m. – 7:00 p.m. **Reception with light hors d'oeuvres** (*590 West, 25th Floor*)

Tuesday, May 17, 2005

7:30 a.m. **Continental Breakfast** (*Atlanta Ballroom C & D*)

8:30 a.m. – Noon **General Session** (*Atlanta Ballroom A & B*)

Noon – 1:30 p.m. **Lunch (provided)** (*590 West, 25th Floor*)

1:30 p.m. – 5:00 p.m. **Concurrent Breakout Sessions**
Breakout A (*Atlanta Ballroom A & B*)
Breakout B (*Georgia East*)

Wednesday, May 18, 2005

7:30 a.m. **Continental Breakfast** (*Atlanta Ballroom C & D*)

8:30 a.m. – Noon **General Session** (*Atlanta Ballroom A & B*)

9:40 a.m. – Noon **FTA/NACTP-Sponsored 2-D Bar Code Standards Working Group Meeting** (*Chastain Room, 25th Floor*)

MONDAY, MAY 16, 2005

7:30 a.m. **Continental Breakfast** (*Atlanta Ballroom C & D*)

8:30 a.m. – 5:00 p.m. **General Session** (*Atlanta Ballroom A & B*)

8:30 a.m.

Welcome to Atlanta

Mack Chandler, Assistant to the Commissioner

8:45 a.m.

IRS/ETA Initiatives

(Including review of initiatives for individual and business tax electronic filing and filing season review and future initiatives)

Bert DuMars, Director, Electronic Tax Administration

9:45 a.m.

Open Forum on IRS/ETA Initiatives

10:00 a.m.

BREAK

10:20 a.m.

NACTP State Electronic Filing Standards - Updated

Mark Castro, Orrtax

Rebecca McCaulley, CCH

Denise Elliott, Intuit

Cindi Gervais, H&R Block

11:20 a.m.

Trends in State Electronic Filing

Harley Duncan, Executive Director, Federation of Tax Administrators

Noon – 1:30 p.m.

Lunch (on your own)

1:30 p.m.

Mandating Electronic Filing – Panel Discussion to Examine Trends in Individual and Business Tax Filing Mandates and Steps to Implementing a Successful Mandate

Harley Duncan, Moderator

Panelists:

Mark Castro, Orrtax

Sue Gaston, H & R Block

Dick Eppleman, Vertex

Jo Ann Bass, IRS

Sean McDaniel, California FTB

Mike Guerin, Massachusetts

2:40 p.m.

FTA-IRS Tactical Advisory Group (TAG) Activities

Terry Garber, TAG Chair

Kevin Richards, TAG Member

3:10 p.m.

BREAK

3:30 p.m.

Filing Season Review Plus What's New for 2006 and Beyond

Each state will speak briefly on the 2005 filing season and outline changes for the 2006 filing season and beyond

5:30 p.m. – 7:00 p.m. **Reception with light hors d'oeuvres** (*590 West, 25th Floor*)

TUESDAY, MAY 17, 2005

7:30 a.m. **Continental Breakfast** (*Atlanta Ballroom C & D*)

8:30 a.m. – Noon **General Session** (*Atlanta Ballroom A & B*)

8:30 a.m.

Free File Alliance – A Discussion with Participating Companies and States

Atilla Taluy, FileYourTaxes.com

Russ Sprouse, Intuit

Susan Reed, CCH

9:20 a.m.

State Retrieval System

Darryl Giles, IRS

9:50 a.m.

BREAK

10:10 a.m.

Federal-State Acknowledgements – Review 1st Year and Examine Changes for 2006 Filing Season

Darryl Giles, IRS

Carolyn E. Davis, IRS

10:50 a.m.

Uniformity Issues for Federal-State Acknowledgements

Jamie Stiles, Drake

Squire Dahl, Orrtax

Steve Thimsen, Idaho State Tax Commission

11:30 a.m.

IRS Encryption Standards

Carolyn E. Davis, IRS

Darryl Giles, IRS

States Representatives (will provide update on experiences with encryption)

Noon – 1:30 p.m. **Luncheon with Table Topics** (*590 West, 25th Floor*)

1:30 p.m. – 5:00 p.m. **Concurrent Breakouts**

Breakout A

(Atlanta Ballroom A & B)

1:30 p.m.

EFTPS Pilot – Panel Discussion

Larry Faulkner, IRS

Kevin Richards, Illinois Dept. of Revenue

Walt Eccard, FMS

Orlando Evans, Bank of America

2:15 p.m.

Marketing New York Style

Lynne Passarelli, New York State Dept. of Taxation & Finance

3:00 p.m.

BREAK

3:30 p.m.

Open Discussion on Issues related to 2005 Filing Season and Changes for 2006 and Beyond

(Topics to include Fed/State Acks, Generic Record, PATS Testing, etc.)

IRS, State, Software Developer participation

Breakout B

(Georgia East)

1:30 p.m.

Federal/State 1120, 1065, and Employment Tax – Background, Updates, and What You Should to do to Prepare

Joan Barr, IRS

Carol McLaughlin, IRS

3:00 p.m.

BREAK

3:20 p.m.

New Federal/State E-file Program Development Process and Effect on 1120, 1065, 1040 and Employment Tax Development

Terry Garber, South Carolina Dept. of Revenue

4:20 p.m.

State Perspective on Preparing for Implementation of Fed/State 1120

State Representatives

AZ, IN, NJ

4:40 p.m.

Streamlined Sales, Federal/State 1120 and Federal/State Employment Tax Developments

Terry Garber, South Carolina Dept. of Revenue

WEDNESDAY, MAY 18, 2005

7:30 a.m. **Continental Breakfast** (*Atlanta Ballroom C & D*)

8:30 a.m. – Noon **General Session** (*Atlanta Ballroom A & B*)

9:45 a.m. – Noon **2-D Standards Working Group** (*Chastain Room, 25th Floor*)

Note: The FTA/NACTP-Sponsored 2-D Barcode Standards Working Group will begin at 9:45 a.m. and run opposite the remaining Wednesday morning sessions.

8:30 a.m.

2-D Barcode Successes – Why Your State Should Join the Program!

Donna Muccilli, Arizona Dept. of Revenue

Veronica Jennings, Alabama Dept. of Revenue

Ginger Hulsey, Oklahoma Tax Commission

9:30 a.m. BREAK

9:45 a.m.

Innovations in Internet Filing, Payment, Account Maintenance and Customer Service for Business and Individual Income Taxes

Karen Barthelmes, Indiana Dept. of Revenue

Sean McDaniel, California Franchise Tax Board

10:45 a.m. BREAK

11:00 a.m.

Addressing Fraud

Sandy Sharpe, Georgia Dept. of Revenue

OTHER MEETINGS

Wednesday, May 18, 2005

1:00 p.m. – 5:00 p.m. **FTA-IRS Tactical Advisory Group (TAG)**
(Atlanta Ballroom B)
Government Only

The FTA-IRS Tactical Advisory Group, or TAG, is intended to provide advice and input on state-related issues related to electronic initiatives and issues for all IRS Business Operating Divisions and functional areas. Member representatives include Illinois, Delaware, Kansas, Arizona, South Carolina, and Virginia. The group meets on a quarterly basis. Areas of work include improvements to cooperative development of new Fed-State EF programs, individual and business E-file marketing, and joint electronic payments. States and IRS personnel are invited to come to this **government-only** meeting May 18-19 to observe and learn more about TAG work

Thursday, May 19, 2005

7:30 a.m. **Continental Breakfast** *(Atlanta Ballroom C & D)*

8:30 p.m. – 4:00 p.m. **FTA-IRS Tactical Advisory Group (TAG)** *(Atlanta Ballroom A)*
Government Only