

FTA Electronic Filing Symposium

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Discussion Topics

- **2007 Filing Season**
- **Free File**
- **New for Filing Season 2008**
- **Modernized E-File**
- **Fed/State Partnership Efforts**
- **E-Services**
- **IRS.gov**
- **Taxpayer Assistance Blueprint**
- **Security**
- **Upcoming Events**
- **Future Projects**

2007 Filing Season Hiccups

- Complexities – Early in the Year
 - Split Refund
 - TETR
 - Late Legislation
- Security
 - Phishing
 - *e-file* Schemes
 - Insecure Web Sites
- Disasters
 - Northeaster
 - VA Tech
 - Intuit

2007 Filing Season

	2007	2006	%Change
Total Individual	76.5M	70.3M	8.8%
Practitioner	54.5M	50.5M	8.0%
OnLine	22.0M	19.8M	11.0%
Free File	3.7M	3.8M	- 1.7%
Fed State	40.2M	35.7M	12.5%
Balance Due	9.4M	8.2M	14.1%

2007 Filing Season - FIRE

2007	2006	%Change
719.9M	462.0M	55.8%

Free File

- 3.8M 2007 Returns
- 18.M since 2003
- 12M Web Site Visits to Free File
- Spanish Sites
- No Advertising
- Free File Wizard

New for Filing Season 2008

- Form 1040 PR/SS
- Form 8917
- Form 8919
- Form 8886
- More PINS... Less Forms 8453
- PATS Testing
- 1041 PIN

MeF - Mandates

- **Corporate 1120/1120S**
 - Tax years ending on or after December 31, 2006
 - Assets of \$10 million or more and file at least 250 returns annually
 - Amended and Superseded returns
 - Previous tax year
 - Assets of \$50 million or more and file at least 250 returns annually

MeF - Mandates

- **Exempt Organizations**

- Assets of \$10 million or more and file at least 250 returns annually
- Private foundations and non-exempt charitable trusts (Form 990-PF) regardless of their asset size, if they file at least 250 returns annually.

MeF - Mandates

- **Partnerships**

- More than 100 partners (Schedule K-1s)

MeF Statistics

	2007	2006	% Change
MeF Total	1,638,950	717,066	128.6%
1065/B	298,841	N/A	N/A
1120	105,337	66,211	59.1%
1120S	426,249	272,965	56.2%
7004	799,885	374,206	113.8%
990/990EZ/PF	5,759	2,706	112.8%
8868	2,879	978	194.4%

Fed/State Partnership Efforts

- **The FTA IRS Tactical Advisory Group (TAG) has supported partnership efforts through communication and monitoring efforts.**
- **Accomplishments**
 - The FTA-IRS TAG formed the TAG Security Group in 2005 and has had several notable Fed/State accomplishments.
- **IRS and the states have partnered together on modernizing e-file (MeF) for business returns.**
- **Six states have accepted Corporate MeF Returns.**
 - Georgia
 - Kansas
 - Maryland
 - Michigan
 - New York
 - Wisconsin

e-Services

	2007	2006
Registration	55,000	74,336
PTINs	30,600	33,150
Interactive TIN Matching	2.6M	2.9M
Bulk TIN Matching	51.3M	81.6M
<i>e-file</i> Application	11,280	15,802
DA	27,000	63,400
EAR	614,000	1.1M

IRS.gov

	2007	2006	% Change
Page Views	885M	860M	2.9%
Visits	137M	125M	9.7%
Downloads	96M	132M	-27.3%

IRS.gov

Latest American Customer Satisfaction Index Scores

- The overall ACSI score for IRS.gov during the 2007 Tax Filing Season was 74 compared to 72 for other government web sites.
- The Likelihood of Visitors to Return to IRS.gov was 86, which is a very high score. In contrast, the overall "Likelihood to Return" Government Benchmark Score is only 82.

Taxpayer Assistance Blueprint (TAB)

- **IRS Oversight Board & National Taxpayer Advocate**
- **5 Year Plan for Taxpayer Service**
- **Focus on 1040 Filers**
- **Taxpayers Want**
 - Transactional Service = Electronic & Phone
 - Interactive = Face to Face
 - Resolve Issues with One Contact

Security

- The security of taxpayer accounts and personal information is a top priority for the IRS.
- Revenue Procedure 2005-60 advises authorized efile providers to have security systems in place to prevent unauthorized access to taxpayer accounts and personal information.
- IRS Security Standards Team – Developed a Safeguarding Taxpayer Data, A Guide for Your Business. Also a tri-fold brochure was developed.

Upcoming Events

- Software Developers Conference June 11 & 12, Washington, DC
- IRS Nationwide Tax Forums July through September

Future Projects: e-Initiatives

- **Excise Tax E-File & Compliance (ETEC)**
- **E-Services for Reporting Agents**
- **Universal E-Signature**
- **Decision Support Tools**
- **1040 Modernization**