



FTA bulletin

Federation of Tax Administrators
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B-11/07
April 2, 2007

ELECTRONIC FILING SYMPOSIUM MAY 20-23, 2007 PITTSBURGH, PA

2-D Barcode Standards – FTA/NACTP May 23 (morning)
FTA-IRS Tactical Advisory Group (TAG) May 23 (afternoon) and May 24 (all day)

To State Tax Administrators:

SUMMARY

The 2007 Electronic Filing Symposium will take place May 20-23, in Pittsburgh, Pa. There also will be a meeting on 2-D Barcode Standards on May 23 and an FTA TAG meeting on May 23-24. Registration is available online at <http://www.taxadmin.org/fs>.

FTA, in cooperation with the IRS, is sponsoring the 2007 Electronic Filing Symposium May 20-23, in Pittsburgh, Pa. at the Pittsburgh Hilton. All individuals interested in individual income tax electronic filing are encouraged to attend, as well as those concerned with electronic filing of business taxes.

There also will be a side meeting on 2-D Barcode Standards on May 23 and an FTA TAG meeting on May 23-24.

Registration for the Symposium will begin on Sunday afternoon, May 20, from 3 p.m. to 7 p.m. There will be a special state-only meeting of e-filing coordinators beginning at 4 p.m. on Sunday. The regular program begins Monday at 8:30 a.m. and will conclude by noon on Wednesday.

There will be a reception with light snacks on Monday evening from 5:30 p.m. to 7 p.m., and a continental breakfast will be available on all three mornings. Attendees will be treated to a "table topic" lunch on Tuesday that will provide additional networking opportunities. While no evening activities are planned, there will be area maps, restaurant lists and activity guides available at the registration desk. Dress for the symposium will be business casual.

A preliminary agenda is attached to this bulletin and is available online at <http://www.taxadmin.org/fs>. Please call Verenda Smith at 202-624-8443 if you have questions about the agenda.

Related Meetings

State Coordinator Meeting. State Efile Coordinators will meet Sunday, May 20, from 4 to 6 p.m. This meeting will provide states an opportunity to discuss filing season events and engage in future planning, etc.

2-D Barcode Standards – FTA-NACTP. There will also be a meeting of the FTA-NACTP-sponsored 2-D Barcode Standards group on the morning of Wednesday, May 23. This group develops voluntary 2-D standards, and will soon begin working on any necessary revisions. See www.taxadmin.org/fta/edi/2-dcurrent.html for more information (and again in April for more specific agenda information). There is no registration fee to attend this meeting, but we ask that you check off the registration form in the appropriate place if you plan to attend.

FTA-IRS Tactical Advisory Group (TAG). 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. The group meets on a quarterly basis. Recent areas of work include overseeing and monitoring cooperative development of Modernized Fed-State EF programs for 1120, 1065, and 1040, joint electronic payments, and security standards. States and IRS personnel are invited to come to this government-only meeting on the afternoon of May 23 and all day May 24 to observe and learn more about TAG work. There is no registration fee to attend this meeting, but we ask that you check off the registration form in the appropriate place if you plan to attend. More information on TAG is available at: <http://www.taxexchange.org/member/projects/projects.html>.

Symposium Registration

Enclosed is the registration form for this meeting. **Please submit your registration by April 30.**

Online registration is available at <http://www.taxadmin.org/fs>.

The symposium registration fee is:

\$340 government and industry (includes Monday evening reception, Tuesday lunch and continental breakfast each morning).

On-site NEW registrations must add a \$35 fee. Cancellations will be accepted without penalty if received by April 30; after that date (except for emergencies) there will be a \$35 processing fee. We do not require that the payment accompany the registration form itself; it may be sent under separate cover.

For questions about your conference registration, please call Linda Luckett at FTA at (202) 624-7871 or write Linda.Luckett@taxadmin.org.

Hotel Registration

The symposium will be held at the Pittsburgh Hilton, 600 Commonwealth Place, Gateway Center, Pittsburgh, PA 15222. The room rate is \$105 per night plus tax, which is currently 14 percent. **The hotel deadline for reservations is Friday, April 20.** For reservations call 412-391-4600, 800-HILTONS or go to <http://www.hilton.com>. Please make sure you tell the hotel that you are with the Federation of Tax Administrators, or FTA. You may also make your reservations from the hotel website, <http://www.hilton.com>, by using the Group Code FTA.

We look forward to seeing you in Pittsburgh.

2007 E-File Symposium

May 20-23, 2007

Pittsburgh, Pa.

Sunday, May 20

4-6 PM

E-File Coordinators Meeting (states only)

Verenda Smith, FTA, moderator

Monday, May 21

8:30 AM

Welcome to Pittsburgh

Verenda Smith, FTA

IRS E-File: Current Initiatives and Those on the Horizon

Jo Ann N. Bass, Deputy Director-Electronic Tax Administration

Electronic Management System and the State Retrieval SubSystem Update

Carolyn Davis and Darryl Giles, IRS

United We Stand: Strengthening the 3-way partnership

Jamie Stiles, Drake Software

Mark Castro, Orrtax

Sue Gaston, H&R Block

State Panelist to be Named

IRS Guide to Safeguarding Taxpayer Data

Shirley Cannady and Carolyn Davis, IRS

Noon – 1:30 PM

Lunch (on your own)

1:30 PM – 5 pm

Free File Alliance Report

Atilla Taluy, FileYourTaxes.com

State Free File Experiences - How We Got Our Numbers Up And Other Lessons Learned

Panel: Ginger Hulsey, Oklahoma; Janis M. Carmichael, Georgia (invited), Jerry Wingate, Missouri (invited), Stacey Weeks, Oregon (invited), Donna Muccilli, Arizona

Filing Season Review & What's New for 2008 and Beyond

Each State will speak briefly on the 2007 filing season and outline changes for the 2008 filing season and beyond

6 – 7:30 PM

Reception

Tuesday, May 22

8:30 AM

Modernized E-File: Everything Industry Needs You To Know

Panel to be named (CCH, Drake, RIA or Intuit with state representatives)

E-file Marketing

From 2-D to E-File – The Plan

Stephanie McFarland, Indiana

Market, Not Mandate

Leann Boswell, Iowa

Panel: How to Attract the ESL Filer

Low-Cost and Spanish E-filing advertisement – Sharon Tanner and
Johnetta Baugham, North Carolina

IRS Multilingual Initiative Results – Sherese Stevens, IRS

Noon – 1:30 PM

Lunch (provided)

1:30 – 5 PM

E-Filing Mandates: Dealing With the Refuseniks

Panel (invited): Bill Grewe, Minnesota; Catherine Cooney, Connecticut; Keith Wicker, South Carolina; James Lucy, Alabama; Roberta Henry, California; Tim Bachman, New Jersey

Break

And how do you feel about that? A frank discussion on standards, PATS and other challenges

Ben Teaford, Liberty Tax
Mark Castro, Orrtax
Rebecca McCaulley, CCH

2006-2007 TAG Update

Tim Blevins, TAG Co-Chair; Peter Maser, TAG Co-Chair

Wednesday, May 23

8:30 AM

EFTPS-Illinois Joint Payment Experience

Kevin Richards, Illinois, and Mark Stevens, Financial Management Service

Modernized E-File: Ready or Not, Here it Comes

Speakers To Be Named Later

MeF: 101 – Overview

XML 101

EFile Types

State and Business Rules

Web services and IRS Gateway 101

11:30 a.m.

ADJOURN

Wednesday, May 23

2-D Barcode Standards meeting

8:30 AM – 11:30 **Check**

<http://www.taxadmin.org/fta/edi/2d/2drevproc.html>

for updated agenda

Wednesday, May 23

TAG meeting

1:30 PM – 5 pm (Updated agenda will be available in coming weeks)

Modernized e-file (MeF) Fed/State Update

TAG Security Subgroup

Secure Data Transfer Project

MLI-State Spanish e-file survey

State Extracts Update

EFTPS State pilot initiative

TAG Planning Session

Thursday, May 24

TAG meeting (continued)

8:30 AM (Wednesday list of topics continued)

3:30 PM **ADJOURN**

Registration Form

**Electronic Filing Symposium
May 20-23, 2007 -- Pittsburgh, Pa.**

Remember, you can register online at <http://www.taxadmin.org/fs>

Name _____

Title _____

Agency/Company _____

Address _____

City _____ State _____ Zip _____

Telephone _____ Fax _____ E-mail _____

REGISTRATION FEE: _____ **\$340** for both government and industry representatives
(Includes Monday evening reception, Tuesday lunch and continental breakfast each morning)

___ Payment will be made at registration at the event, or by payment order/voucher

___ Payment is enclosed

___ Check ___ VISA ___ MasterCard ___ American Express

Name as it appears on card _____

Account Number _____ Expiration Date _____

Signature _____

Please mark if you plan to attend. There is no fee for these:

___ Monday reception ___ Tuesday lunch

___ 2-D Barcode Standards, May 23

___ TAG, May 23-24 (government only)

(continental breakfast included Thursday and Friday)

HOTEL REGISTRATION DEADLINE IS APRIL 20
SYMPOSIUM REGISTRATION DEADLINE IS APRIL 30
An additional \$35 fee is assessed for all on-site registrants and all those who cancel after April 30, except for emergencies.

Please make checks payable to: Federation of Tax Administrators

Note payment is for: *Electronic Filing Symposium*.

Our Federal ID # is: 36-2327263

Fax (202) 624-7888 or mail this form to:

Federation of Tax Administrators

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