

IRS e-File

presented by
Carol Mullins

*Director – Submission Processing
Modernization Information and Technology
Services*

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Agenda

- **Introduction**
- **TY 2007 Changes**
- **Legacy e-File**
- **Modernized e-File (MeF)**
- **Ongoing Work**
- **Changes for the Up-Coming Filing Season (TY 2008)**



TY 2007 Key Changes

- **General**

- TY 2007 Changes
- AMT Patch
- Technical Correction / Mortgage Forgiveness Act
- Economic Stimulus Package

- **Legacy e-File**

- Disabled Forms 1065, 7004, 990 from EMS (Transitioned to MeF)
- Temporarily disabled AMT Forms due to late legislation
- Temporarily disabled “Julian Date” for Checking

- **MeF**

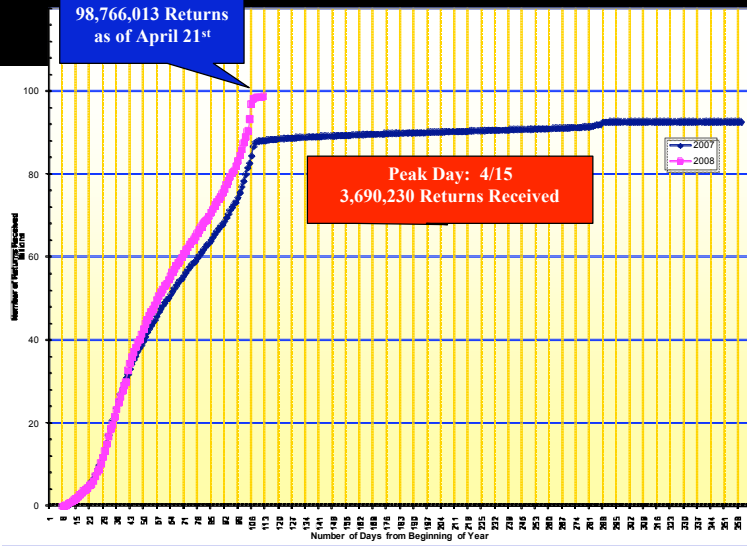
- Implemented Release 5 (Forms 1120F and 990N)



Legacy e-File

EMS Form 1040 Cumulative Data

(Processing Year 2007 versus 2008)



Modernized e-File

MeF Submission Metrics Comparison

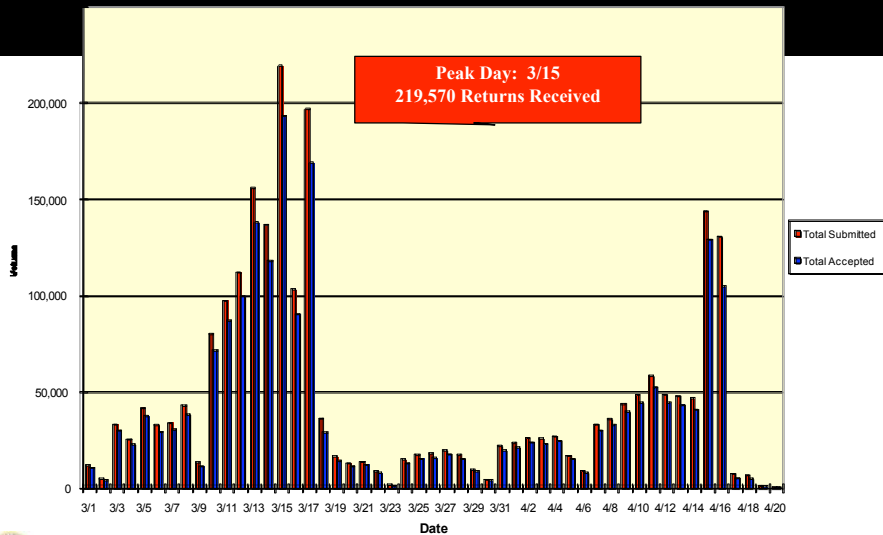
	2006	2007	2008 ^A
• Returns Received	982,399	2,511,312	2,723,212
• Returns Accepted	935,316	2,232,697	2,398,709
.....			
• Form 1120 / 1120S / 1120F	423,989	965,525	680,403
• Form 7004	492,033	933,608	933,235
• Forms 990 / 990-EZ / 990-PF / 1120-POL / 8868	8,208	85,065	61,690
• Federal-State / State Submissions	11,086	57,095	105,868
• Mandated Returns	~14,000	67,929	17,931
• Form 2290 / 8849 / 720	----	3,223	2,149
• Forms 1065 / 1065B	----	470,570	390,732

^A 2008 Data as of April 12, 2008



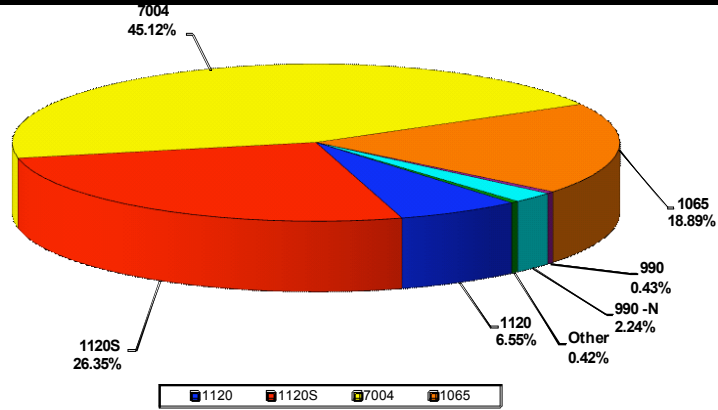
MeF Submission Metrics

(March 2008 – April 2008)



MeF Returns By Form Type

(January 1, 2008 – April 19, 2008)



Ongoing Work

Engineering Work

- Evaluating Multi-Site Processing Capabilities
- Improve Overall System Performance
- Optimize Return Processing
- Continuous Code Reviews



Performance and Capacity Planning

- Benchmark Test
 - Analyze Infrastructure Requirements for IMEF Release 6
 - “Paradigm Shift” (BMF to IMF)
- Developed an End-2-End Performance and Capacity Model
 - Unique Form and Volume Characteristics
 - Diverse Return Due Dates and Peaks
 - Consider Return Complexity
 - Assist with Identifying Bottlenecks
 - Conduct “What If Scenarios”
 - Analyze the Impact of Proposed New or Upgraded Capabilities
- Impacts to Performance and Capacity
 - Adoption Rate (Legacy e-File to MeF)
 - Legislative / Mandates



Changes for the Upcoming Filing Season (TY 2008)

TY 2008 Changes

- **28 Provisions in the Tax Law Expire**

- Examples: AMT, Teacher Expense Deduction, Deduction for State and Local Sales Taxes...etc

- **Phase 2 of the Economic Stimulus**

- **New Test System for EMS (TY 2008)**

- **45 Day Password Reset for EMS**

- **MeF Release 5.5 – 990 Redesign (Jan 2009)**

- **Election Year Unknowns**

- What will Congress do??

