

FTA Electronic Filing Symposium

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Discussion Topics

- **FTA–IRS Partnership Efforts**
- **Advancing e-file Study**
- **Strengthening Rules for e-file Providers**
- **2008 Filing Season**
- **IRS.gov**
- **Marketing: e-file Campaign**
- **E-services**
- **Future e-initiatives**
- **Upcoming Events**

Fed/State Partnerships

- **The FTA-IRS Tactical Advisory Group (TAG) has supported partnership efforts through communication and monitoring.**
- **Accomplishments**
 - **Successful implementation of Corporate MeF for business returns**
 - **Successful implementation of a Modernized Internet application for the Employer Identification Number**
 - **Participation in the Advancing e-file Study**
 - **Engaged and working closely on MeF 1040**

Advancing e-file Study

- **With more than half of taxpayers now filing electronically, IRS is conducting a study to determine the best ways to ensure taxpayers transitioning from paper filing to electronic filing.**
 - **Many stakeholders, including the FTA, have offered insights and research data.**
 - **This first study, expected Summer 2008, will explore best practices and draw conclusions from the experiences of states of other countries.**
 - **A follow-on study will recommend next steps for the IRS.**

Strengthening Rules For e-file Providers

- **Enhancing the existing security and privacy requirements for IRS e-file Providers**
- **Gathering input and feedback from our stakeholders**
- **Looking at the following:**
 - Minimum Standards for SSL Certificate
 - Security Scan
 - Privacy Policies
 - Taxpayer Login/Registration Web Page

2008 Filing Season

Challenges

- **Political Impacts**
 - Late Legislation
 - Economic Stimulus Payments
- **Safeguarding Taxpayer Information**
 - Identity Theft and Fraud Prevention
 - URL Registration

Filing Season Statistics

(as of April 15, 2008)

	2008	2007	% Change
Total e-file	84.4M	75.5M	12%
ERO	58.7M	54.1M	8%
Online	25.7M	21.4M	21%
Fed/State	43.6M	39.3M	9%
Balance Due	11.0M	9.1M	14%

IRS.gov Statistics

(as of April 15, 2008)

Change	2008 (Jan 1–Apr 15)	2007 (Jan 1–Apr 15)	%
Page Views	1,014.2M	809.8M	25.2%
Visits	156.8M	124.5M	25.9%
	2008 (Jan-Mar *)	2007 (Jan-Mar *)	% Change
Downloads	78.0M	70.0M	11.3%

* Cumulative download data for Jan-March were provided because April 2008 download statistics will not be available until mid-May.

Marketing e-file Campaign

- **Launched Integrated Campaign November 2007**
- **Tactics Include:**
 - Satellite and Radio Media Tours (in English and Spanish)
 - Television and Radio Public Service Announcements
 - Partnerships (Society for HR Managers, American Payroll Association, Direct Sellers Association, National Restaurant Association)
 - Cinema Advertisements

e-Services

Access expanded to include:

- **Reporting Agents**
 - **Electronic Account Resolution**
 - **Transcript Delivery System**
- **Circular 230 practitioners**
 - **Disclosure Authorization**
 - **Electronic Account Resolution**
 - **Transcript Delivery System**

Future e-initiatives

- **My IRS Account is an online application that will enable taxpayers to do the following:**
 - View account information including refunds or balances, pending payments, tax returns and transcripts

- **Key features include**
 - Access tax account information
 - Complete online address changes
 - Complete and sign Form 2848, Power of Attorney
 - Get a payoff amount

Future e-initiatives

(continued)

- **Bulk Electronic Notice Delivery (BED)**
 - Provides a secure portal for Reporting Agents to use to access clients' information

 - Goal: to demonstrate an effective means of electronically delivering bulk notices.

 - Estimated cost savings in postage and materials based on approximately 200,000 items send during pilot: \$114,000

Upcoming Events

- **Software Developers Conference**
 - May 28 - 29 Alexandria, VA

- **IRS Nationwide Tax Forums**
 - July 1- 3 Atlanta, GA
 - July 22- 24 Chicago, IL
 - August 5- 7 Orlando, FL
 - August 19 - 21 Las Vegas, NV
 - August 26- 28 New York, NY
 - September 9-11 San Diego, CA