

FTA 2008 E-File Symposium
Millennium Hotel, April 27-30, 2008
Minneapolis, MN

Sunday, April 27

4 - 6 PM **E-File Coordinators Meeting (*states only*) – Horizons room**
Verenda Smith, FTA, moderator

Monday, April 28

7:30 – 8:30 **Continental Breakfast**
Forum Foyer

General Session
Center and South Forum

8:30 AM **Welcome to Minneapolis**
Verenda Smith, FTA

8:40 – 9:30 **IRS E-File: Current Initiatives and Those on the Horizon**
David Williams, Director - Electronic Tax Administration, IRS

9:30 – 10 **E-Services**
Beth Jones, Director, Electronic Products and Services Support, IRS

10 – 10:15 Break

10:15 – 10:45 **Modernized Electronic Filing**
Carol Mullins, Director – Submission Processing Domain

10:45 – 11:05 **2007-2008 TAG Update**
Jerry Coble, North Carolina and State TAG Co-Chair

11:05 – Noon **Modernized E-File Progress and What You Need To Know: Life Under EMS vs. Life Under MeF**
Carol McLaughlin, IRS, and Donna Muccilli, Arizona

Noon – 1:30 PM **Lunch** (on your own)

1:30 – 3 **State MeF 101 – Seven Steps to Success**
- Build Communications Gateway
- Define State Business Rules and Create Specifications
- XML Schema Creation
- Develop a Back-End System
- Create a Viewing System
- Complete Administrative Duties (with IRS)

Terry Garber, South Carolina, Carol McLaughlin, IRS, and Greg Martinez,
Intuit

3 – 3:30 **BREAK**

3:30 – 5 **Filing Season Review and What’s New for 2008 and Beyond**
Each state will speak briefly on the 2008 filing season and outline changes for
the 2009 filing season and beyond

5:30 – 7 PM **Reception** – Horizons Room

Tuesday, April 29

7:30 – 8:30 **Continental Breakfast** - Forum Foyer

General Session Center and South Forum

8:30 – 9:15 **How Industry Is Planning to Address MeF, and Educating Your
Practitioners**
Rebecca McCaulley, CCH
Jamie Stiles, Drake
Jack Gibson, Drake

9:15 – 10 **E-File Marketing (And Beyond): Streaming Video**
Bart Rydalch, Washington State
Michael Guerin, Massachusetts

10 – 10:30	Break
10:30 – 11:30	IRS Multilingual Initiative Results Maria Cheeks and Teresa Fernandez, IRS
11:30 – Noon	E-File by Design: Marketing to Diverse Populations Mitchell Bowden, North Carolina
Noon – 1:30 PM	Lunch – Loring Ballroom (provided)
1:30 – 2:15	Identifying Fraudulent Electronic Returns and Blocking Refunds Penny Feneis, Minnesota
2:15 – 3	Ohio E-Forms: What We've Done and Why We Did It Del Harlan and Karen Fisk, Ohio
3 – 3:15	BREAK
3:15 – 3:45	Internet Filing of W-2s to the State Dawn Glazier, Idaho
3:45 – 4:30	Standards and Other Challenges Rebecca McCaulley, CCH Jamie Stiles, Drake Jack Gibson, Drake
4:30 - 5	Free File Alliance: A State and Federal Perspective Atilla Taluy, FileYourTaxes.com
5:30-7 PM	Free File Roundtable Discussion <i>to foster thinking about ways to encourage market growth</i> Industry and State Representatives

Wednesday, April 30

7:30 – 8:30 **Continental Breakfast** - Forum Foyer

General Session Center and South Forum

8:30 – 9:15 **State Direct Internet Filing**
Kevin Richards, Illinois
Meggan Swisher, Pennsylvania

9:15 – 10 **Delving into the Numbers, plus Around the World in 80 Seconds**
Harley Duncan, FTA

10 – 10:15 Break

10:15 – 11 **Life After Individual E-File – W-2s, anyone?**
Kansas representative (invited)

11 - Noon **Montana Property Tax Refund: A “Ready Return” Case Study**
Steve Austin, Montana

Noon **ADJOURN**