



FTA bulletin

Federation of Tax Administrators
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B-07/09

March 23, 2009

**PRELIMINARY PROGRAM
ELECTRONIC FILING SYMPOSIUM
MAY 3-6, 2009 - SAN DIEGO, CALIF.**

To State Tax Administrators:

SUMMARY

The 2009 Electronic Filing Symposium will take place May 3-6, in San Diego, Calif. There also will be an FTA TAG Meeting on May 6-7 and an FTA 2-Dimensional Barcode Standards group meeting on May 6. Conference and Hotel Registration is available online at <http://www.taxadmin.org/fs>.

A preliminary program is also available.

FTA is sponsoring the 2009 Electronic Filing Symposium May 3-6, in San Diego, Calif. at the Doubletree Mission Valley. All individuals interested in individual income tax electronic filing are encouraged to attend, as well as those concerned with electronic filing of business taxes. Among the topics discussed will be readiness for the January 2010 Fed/State 1040 Modernized E-File rollout.

There also will be an FTA TAG meeting on May 6 – 7, to which government attendees are invited, as well as an FTA 2D Barcode Standards meeting to which government and industry attendees are invited.

On the evening of May 5, the FTA-Free File Best Practices Advisory Group will conduct their meeting. All attendees are welcome to attend this working-group meeting to learn more about this group and current and future developments.

Registration for the Symposium will begin on Sunday afternoon, May 3, from 3 p.m. to 7 p.m. There will be a special state-only meeting of e-filing coordinators 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 an "Advancing Efile Study" lunch on Monday that will provide additional networking opportunities and features a special presentation by David Williams, IRS Director of Electronic Tax Administration and Refundable Credits.

Dress for the symposium is business casual.

Related Meetings

State Coordinator Meeting. State Efile Coordinators will meet in the late afternoon on Sunday, May 3. This meeting will provide states an opportunity to discuss filing season events, updates to the fed/state acknowledgement program, future planning, etc.

sponsored 2-D Barcode Standards group. This group develops voluntary 2-D standards and will soon begin working on necessary revisions. See www.taxadmin.org/fta/edi/2-dcurrent.html for more information. There is no registration fee to attend this meeting.

FTA Free File Advisory Group. The Free File Advisory Group will also conduct a working meeting for participating Free File states and industry representatives. This meeting will begin after the regular session ends on Tuesday. Attendees will review and update current practices and discuss opportunities for partnership and cooperation in the future. There is no registration fee to attend this meeting.

FTA-IRS Tactical Advisory Group (TAG). The FTA-IRS Tactical Advisory Group (TAG) provides advice and input on state issues related to electronic initiatives for all IRS Business Operating Divisions. The group meets quarterly. Recent work includes overseeing 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 6 and all day May 7 to observe and learn more about TAG work. There is no registration fee, but we ask that you check off the registration form if you plan to attend. More information is available at: <http://www.taxexchange.org/>.

Symposium Registration

Enclosed is the registration form for this meeting. **Please submit your registration by April 20.** Online registration is available at www.taxadmin.org. **If you have questions about your conference registration,** call Darrell Reeves at FTA at 202-624-5892 or write Darrell.Reeves@taxadmin.org.

The symposium registration fee is:

\$365 government and industry (includes Monday evening reception, Monday 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. (Late approval from the governor's office for travel counts as an emergency.)

Hotel Registration

The symposium will be held at the Doubletree Mission Valley, 7450 Hazard Drive, San Diego, California, 92108. The room rate is \$147 per night plus tax, which is currently 10.5 percent. **The hotel deadline for reservations is April 3.** For reservations call 619-297-5466 (be sure to say you're with the Federation of Tax Administrators) or go to the Doubletree's personalized web page for this event, <http://doubletree.hilton.com/en/dt/groups/personalized/SDGO-DT-FTA-20090502/index.jhtml>.

We look forward to seeing you in San Diego.

Sincerely,

Jim Eads
Executive Director

**FTA ELECTRONIC FILING SYMPOSIUM
MAY 3-6, 2009
SAN DIEGO, CALIF.**

PRELIMINARY AGENDA

Sunday, May 3

4 p.m. - **E-File Coordinators Meeting** (*states only*)
6 p.m. Verenda Smith, FTA, moderator

Monday, May 4

8:30 a.m. - **Welcome and Introductions**
Noon FTA

IRS E-File: IRS Status Update, Challenges and Changes
David Williams, Director, Electronic Tax Administration and Refundable Credits, IRS

Modernized Electronic Filing Rollout
Valerie Gunter, Acting Director, Development Services Division, IRS
Carol Mullins, Director-Submission Modernization Information and Technology Services Organization, IRS

Mef Transition; What Our Partners Need to Succeed
Valerie Gunter, Acting Director, Development Services Division, IRS
Juanita Wueller, IRS
CPA Representative(s)
Industry Representative(s)

ETA Database: An Effective Tool for Coordinators
Kevin Mullen, IRS

Noon - **Lunch** (*provided*)
1:30 p.m. *Advancing Efile Study*
David Williams, Director, Electronic Tax Administration and Refundable Credits, IRS

Monday (continued)

1:30 p.m.
- 5 p.m.

TAG Update
State Representative

NACTP Principles for Deploying Modernized eFile
NACTP Panel

Efile Marketing: Tips and Tools States Can Use
Lisa Valentine, IRS
Michael Cosgrove, PhD, Senior Vice President, Low + Associates
Andrew Bellows, Senior Account Executive, Low + Associates

5 p.m.

FTA Free File Advisory Group Meeting
Industry and State Representatives

5:30 p.m. -
7 p.m.

Reception

Tuesday, May 5

8:30 a.m. -
Noon

Preparer Enforcement Revenue
State Representative(s)

FTA Free File Advisory Group Progress
Donna Muccilli, Moderator
Russ Sprouse, Intuit
David Macklin, Computer and Communication Industry Association
State Representative(s)

Online Fraud Detection and Identity Theft
Hun Kim, Director Online Fraud Detection and Prevention, IRS

Signature Alternatives: Why We Do What We Do
State Representative Panel

Noon
- 1:30 p.m.

Lunch (*on your own*)

1:30 p.m.
- 5 p.m.

Refund Crimes and ERO Sanctions
IRS Representatives

State MeF: Standards, Structures and Rules
Terry Garber, South Carolina, FTA TIGERS Co-Chairperson
Greg Martinez, Intuit, FTA TIGERS Co-Chairperson

State Updates
Each State will speak briefly on the 2009 filing season and outline changes for the 2010 filing season and beyond

Tuesday (continued)

5:30 p.m.-
6:30 p.m. **FFA working group sharing meeting**

Wednesday, May 6

8:30 a.m. -
11:30 a.m. **FSET - Modernized Approach to Payroll Taxes**
State and Industry Representatives

Marketing Technology: A State’s Prospective
Rita Tsibulevskaye, Maryland

Income Tax: “Ready-Return” Successes
State Representative

GPS for the IP Addresses
Michael Guerin, Massachusetts

11:30 a.m. Adjourn

Wednesday, May 6
TAG meeting

8:30 -
11:30 a.m. **2 Dimensional Bar Code Standards Meeting**
State and Industry personnel are invited

1:30 p.m.
- 5 p.m. **FTA-IRS Tactical Advisory Group (TAG) Meeting**
States and IRS personnel are invited

Thursday, May 7

8:30 a.m..
- 3 p.m. **FTA-IRS Tactical Advisory Group (TAG) Meeting**
States and IRS personnel are invited

Registration Form
Electronic Filing Symposium May 3-6, 2009 -- San Diego, CA

You can register online at <http://www.taxadmin.org/fs>

Name _____

Title _____

Agency/Company _____

Address _____

City _____ State _____ Zip _____

Telephone _____ Fax _____ E-mail _____

REGISTRATION FEE: _____ **\$365** 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

If paying by credit card, name as it appears on card

Account Number

Expiration Date

Signature

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

___ 2D Barcode Standards Meeting

___ Free File Advisory Group

___ TAG Meeting

HOTEL REGISTRATION DEADLINE IS APRIL 3, 2009
SYMPOSIUM REGISTRATION DEADLINE IS APRIL 20, 2009.
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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