



Idaho 2010 MeF Experience

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Idaho Individual MeF Volume

- Resident: 1,977 (9 rejects)
- Non-resident: 160 (3 rejects)
 - 281 linked returns
- Software Developers approved:
 - 2nd Story
 - TaxSlayer
 - H&R Block (2 products)
 - Intuit
 - OLT



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Idaho Business MeF Volume

- Corporate: 605 returns (24)
- S-Corp: 5,765 returns (133)
- Partnership: 5,565 returns (140)
 - 2081 Linked returns
- 2007 totals: 2,025 returns
- 2008 totals: 6,701 returns
- 2009 % increase so far: 78%



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Helpful Hints

- Get started; there is a lot to do!
 - Submit schemas to statemef.com early for review
 - Early publication release means early testing
- Develop strong relationships with your software developers.
 - Lots of returns are needed beyond those for ATS
- Slow down and be patient
 - Test each submission thoroughly and completely, you don't know when you will get another through the IRS.
 - Ensure you are meeting the needs of internal customers before you release schemas.



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Idaho's Stylesheet solution

- Designed in .xls
- All Idaho forms for processing
- Integrated into GenTax
- Utilize IRS stylesheets for federal data

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Lessons Learned

- SSN ranges in test packet
 - Linked vs. unlinked
- Binary attachments
 - develop schemas whenever possible.
 - Print to PDF vs. Save as PDF
- Complete Federal return
 - White paper detail: MeF vs. EMS vs. Paper

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Lessons Learned

- Business rules vs. schema design
 - Understand the relationship
- Stylesheets
 - Leverage current technologies, don't reinvent the wheel!
- Constant improvement
- Understand IRS WebServices

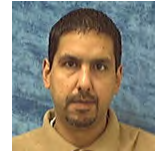
Idaho MeF documentation

- Idaho Business and Individual Schemas
 - Same schema file with common schedules
- Developer specs and practitioner handbooks:
 - Combined BIT and IIT into one publication
- Test packages
 - Maintained separate publications
 - For 1040 MeF: 11 matrix based test cases (same as EMS)
- Available at tax.idaho.gov/p-taxpros.cfm

Idaho MeF Contact Information

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