

# FTA Technology Conference and Exhibition

## Schedule for Sunday, August 1, 2010

- 2:30 p.m. - 6:30 p.m.      **REGISTRATION - *Grand Ballroom Prefunction***  
6:30 p.m. - 8:00 p.m.      **WELCOME RECEPTION - *Grand Ballroom Prefunction***

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## Schedule for Monday, August 2, 2010

- 7:30 a.m. - 8:30 a.m.      **CONTINENTAL BREAKFAST - *Grand Ballroom Prefunction***  
8:30 a.m. – 10:30 a.m.      **GENERAL SESSION - *BUCKHEAD BALLROOM***

**Introduction**  
**Federation of Tax Administrators**

**Welcome to Georgia**  
**Bart L. Graham, Commissioner, Georgia Department of Revenue**

**Keynote Addresses:**  
**The Importance of Information Security and Public Data Protection**  
**Harry D. Raduege, Jr., Chairman, Center for Cyber Innovation, Deloitte Consulting**

**Revenues at Risk: Compliance Management using Innovative Solutions**  
**Andre van der Post, Senior Manager, and Jan Beck, Project Management, Tax Global Business Unit – Oracle**

- 11:00 a.m. – Noon      **CONCURRENT SESSIONS**

**SESSION 1    Piedmont 1**  
**FTA-IRS Tactical Advisory Group (TAG) UPDATE**  
**Terry Garber, SC, State TAG Member & others**

**SESSION 2    Peachtree**  
**DC's Enterprise Service Bus Success Story: Increased Transparency, Heightened Security, Reduced Costs**  
**Mike Teller and James Hightower, District of Columbia**

**SESSION 3    Buckhead Ballroom 1**  
**Building a Quality Oriented Data Warehouse**  
**Alison Torres, Teradata**

**SESSION 4** Buckhead Ballroom 2  
**Sponsor Solution Series One – Bigger than Buying a Car: A Tax Administrator’s Guide to Making Wise IT Investments**  
Delena Bratton and Will Rice, Fast Enterprises

**Session 5** Azalea  
**Increasing Sales Tax Compliance by Pet Sellers and Other Businesses Advertising on the Internet**  
Sandy Ettinger, Technology Law and Strategies

Noon – 5:00 p.m.

**EXHIBIT HALL SETUP**

Noon – 1:30 p.m.

**LUNCH (on your own)**

1:30 p.m. – 2:30 p.m.

**CONCURRENT SESSIONS**

**SESSION 1** Piedmont 1  
**TIGERS Modernized e-File Updates, Changes, and New Items on the Horizon**  
Terry Garber, South Carolina, TIGERS Co-Chair and Donna Muccilli, FTA

**SESSION 2** Peachtree  
**NACHA/FTA Partnership on State Tax Change Notifications**  
Jonathan Lyon, FTA, Robert Unger, Senior Director, NACHA and John Biloz, JPMorgan

**SESSION 3** Buckhead Ballroom 1  
**Service Oriented Architecture (SOA) and Best Practices**  
Tim Blevins, CGI

**SESSION 4** Buckhead Ballroom 2  
**Sponsor Solution Series Two – To Offer vs. Not to Offer Tax Amnesty – One State’s Story**  
Joseph Sterlace, SAP

**Session 5** Azalea  
**Can State Government Get Ahead of the Technology Curve?**  
Robert “Bubba” Lange, Zytax, a FuelQuest Company

2:45 p.m. – 3:45 p.m.

**CONCURRENT SESSIONS**

**SESSION 1** Piedmont 1  
**IRS and State Experiences – Surviving Year One of 1040 Modernized e-File (MeF)**  
Robert Bedoya, IRS-ETARC, Terry Hunt, Kansas, and Rance Pier, Oregon

**SESSION 2** Peachtree  
**Outsourcing Your Data Entry Functions**

**Tim Shields, Georgia**

**SESSION 3** Buckhead Ballroom 1  
**An Overview of Cloud Computing**  
**Joe Tobolski, Accenture**

**SESSION 4** Buckhead Ballroom 2  
**Sponsor Solution Series Three - Better Tax Filing & Processing**  
**Through Improved Taxpayer Interactions**  
**Josh van Tonder, Adobe Systems**

**Session 5** Azalea  
**The Electronic Age is Coming – What Happens When the Paper**  
**Goes Away?**  
**Stan Farmer, CGI**

**4:00 p.m. – 5:00 p.m.**

**CONCURRENT SESSIONS**

**SESSION 1** Piedmont 1  
**Going Live with Modernized e-File (MeF) for Individual Income**  
**Danny Reeves, Revenue Solutions, Inc.**

**Session 2** Peachtree  
**Managed IT Services – Is There a Business Case?**  
**Tim Blevins, CGI**

**SESSION 3** Buckhead Ballroom 1  
**Bridging the Business / IT Gap**  
**Alison Torres, Teradata**

**SESSION 4** Buckhead Ballroom 2  
**Sponsor Solution Series Four – What Public Records Can Do**  
**for Collections and Tax Discovery**  
**Andy Bucholz, Lexis/Nexis Advanced Government Solutions**

**Session 5** Azalea  
**TBA**

**5:00 p.m. - 8:00 p.m.**

**RECEPTION – EXHIBIT HALL – GRAND BALLROOM**

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# DAY AT A GLANCE

## Tuesday, August 3

- 7:30 a.m. – 3:00 p.m.**      ***Conference Registration - Grand Ballroom Prefunction***
- 7:30 a.m. – 8:30 a.m.**      ***Continental Breakfast – in Exhibit Hall – Grand Ballroom***
- 7:30 a.m. – 1:30 p.m.**      ***Exhibit Hall Open – Grand Ballroom***
- 8:30 a.m. – 10:45 a.m.**      **CONCURRENT SESSIONS**  
Session 1      Piedmont 1  
Session 2      Peachtree  
Session 3      Buckhead Ballroom 1  
Session 4      Buckhead Ballroom 2  
Session 5      Azalea
- 11:00 a.m. – 1:30 p.m.**      ***Lunch and Vendor Exhibits - Exhibit Hall – Grand Ballroom***
- 1:30 P.M.**      ***EXHIBIT TEARDOWN - Exhibit Hall – Grand Ballroom***
- 1:30 p.m. – 5:00 p.m.**      **CONCURRENT SESSIONS**  
Session 1      Piedmont 1  
Session 2      Peachtree  
Session 3      Buckhead Ballroom 1  
Session 4      Buckhead Ballroom 2  
Session 5      Azalea

## Schedule for Tuesday, August 3, 2010

**7:30 a.m. - 8:30 a.m. CONTINENTAL BREAKFAST**

**8:30 a.m. – 9:30 a.m. CONCURRENT SESSIONS**

**SESSION 1** Piedmont 1  
**Emerging Electronic Filing Issues in Payroll Tax Reporting**  
Pete Isberg, National Payroll Reporting Consortium, Inc. &  
Jenine Hallings, Paychex, Inc.

**SESSION 2** Peachtree  
**Everything Elastic: A View of Businesses and How They Are**  
**Gaining a New Capability to Change**  
Joe Tobolski, Accenture

**SESSION 3** Buckhead Ballroom 1  
**Addressing the Core Competency of Tax Administration**  
George A. Love III, Capgemini

**SESSION 4** Buckhead Ballroom 2  
**Sponsor Solution Series Five – Susan Terry, Teradata**

**SESSION 5** Azalea  
**Trends in the Adoption of Document and Payment Processing**  
**Technologies (Panel)**  
Mark Brousseau, Brousseau & Associates, and Panel:  
Rich Miller, ibml  
Laurie Hunter-Manning, J&B Software  
Michael D. Minter, Fairfax Imaging, Inc.

**9:45 a.m. – 10:45 a.m. CONCURRENT SESSIONS**

**SESSION 1** Piedmont 1  
**Two Perspectives on Improving Electronic Business Filings:**  
**San Francisco and the United Kingdom**  
Josh van Tonder, Adobe

**SESSION 2** Peachtree  
**Recent Activities of the FTA-IRS Jointly Sponsored Tactical**  
**Advisory Group Security Subgroup (TAG SS) and Review of**  
**Latest Publication 1075**  
Sammi Shultz, IRS

**SESSION 3** Buckhead Ballroom 1  
**Tax System Considerations for an Amnesty Program**  
Tiffany Richards, Revenue Solutions, Inc.

**SESSION 4** Buckhead Ballroom 2  
**Sponsor Solution Series Six – Agile Administration Through  
the Use of Policy Management and Automation Solutions**  
Randy Covert and Richard Finley, Oracle

**SESSION 5**  
**Maine’s Successful Modernization of its Legacy  
Integrated Tax System**  
Jerome D. Gerard, Maine, Danny Reeves, Revenue Solutions,  
Inc., and Roger Widner, AdvanTech

**10:45 a.m.- 1:00 p.m.** **LUNCH IN EXHIBIT HALL – GRAND BALLROOM**

**1:30 p.m. – 5:00 p.m.** **EXHIBIT HALL BREAKDOWN**

**1:30 p.m. – 2:30 p.m.** **CONCURRENT SESSIONS**

**SESSION 1** Piedmont 1  
**Louisiana’s ParishE-File.com Web Portal**  
Rick Mekdessie, e-Gov Systems

**SESSION 2** Peachtree  
**Providing Technical Solutions to Protect Federal Tax  
Information**  
James Hightower, DC

**SESSION 3** Buckhead Ballroom 1  
**Tax Refund Fraud and How to Successfully Combat It**  
Andrew Bucholz, LexisNexis Special Services Inc., Reed  
Elsevier Inc.

**SESSION 4** Buckhead Ballroom 2  
**Sponsor Solution Series Seven – Trends in Cloud Computing  
Affecting Taxation**  
Joe Coyle and Sean Rhody, Capgemini

**SESSION 5** Azalea  
**Mississippi’s Comprehensive Government Collections**  
Matt Austin, CR Software LLC

**2:45 p.m. – 3:45 p.m.** **CONCURRENT SESSIONS**

**SESSION 1** Piedmont 1  
**Wisconsin Improves Access to Free, Online Personal Tax Filing  
Tools**  
Janna Baganz and Vicki Gibbons, Wisconsin

**SESSION 2** Peachtree  
**Implementing Security, Privacy and Controls Using Modern  
ERP-based Tax Systems**  
Richard Rudnicki and Rita Scoggins, Deloitte & Touche LLP

**SESSION 3** Buckhead Ballroom 1  
**India's Integrated Taxpayer Data Management System (ITDMS)**  
**Venu Gouravelly, Posidex Technologies**

**SESSION 4** Buckhead Ballroom 2  
**Sponsor Solution Series Eight - The Future of Tax Administration (from a Vendor's Point of View)**  
**Paul Panariello, Revenue Solutions, Inc.**

**SESSION 5** Azalea  
**Effective Use of Financial Institution Data Match (FIDM) to Collect State Tax Debt**  
**Terri Steenblock, Minnesota**

**4:00 p.m. – 5:00 p.m.**

**CONCURRENT SESSIONS**

**SESSION 1** Piedmont 1  
**Mandating Electronic Filing – What's in it for You?**  
**Robert "Bubba" Lange, Zytax, a FuelQuest Company**

**SESSION 2** Peachtree  
**The Analysis and Mitigation of Risks In IT Systems**  
**John McCumber, Symantec**

**SESSION 3** Buckhead Ballroom 1  
**How Technology Is Transforming the Desk Audit Function**  
**John Bace, Revenue Solutions, Inc., and Representative, Massachusetts (invited)**

**SESSION 4** Buckhead Ballroom 2  
**Agency-Led Rollouts of Commercial Off-the-Shelf Integrated Tax Software**  
**Don Graham, Angela Free, and Matthew Dyar, Alabama**

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## **DAY AT A GLANCE**

**Wednesday, August 4**

- 7:30 a.m. – 9:30 a.m.**      **Conference Registration - Grand Ballroom Prefunction**
- 7:30 a.m. – 8:30 a.m.**      **Continental Breakfast – in Exhibit Hall – Grand Ballroom**
- 8:30 a.m. – Noon**              **CONCURRENT SESSIONS**  
Session 1      Piedmont 1  
Session 2      Peachtree  
Session 3      Azalea

**FTA TECHNOLOGY CONFERENCE CLOSE - NOON]**

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### **ASC/X12 TIGERS XML Standards Meeting**

- 1:30-5:00 p.m. – TIGERS e-Standards Meeting**      Azalea Room  
(See Wednesday Agenda for detail)

**Thursday, August 5, 2010**

- 7:30-8:30 a.m.**                      **Continental Breakfast - Azalea Room**
- 8:30-5:00 p.m.**                      **TIGERS e-Standards Meeting - Azalea Room**  
(See Wednesday Agenda for detail)

**[TIGERS Adjourn]**

## Schedule for Wednesday, August 4, 2010

**7:30 a.m. - 8:30 a.m.**

**CONTINENTAL BREAKFAST**

**8:30 a.m. – 9:30 a.m.**

**CONCURRENT SESSIONS**

**SESSION 1** Piedmont 1

**IRS Secure Data Transfer and General Data Exchange Issues  
Rod Sterling, IRS**

**SESSION 2** Peachtree

**Choosing the Best Integrated Tax System  
Shelley Lieberman, Mathtech, Inc.**

**SESSION 3** Azalea

**Update on Progress with Streamlined Sales Tax  
David Thompson, Streamlined Sales Tax Governing Board**

**9:45 a.m. – 10:45 a.m.**

**CONCURRENT SESSIONS**

**SESSION 1** Piedmont 1

**From Refund Intercepts to the ‘Full Meal Deal’: Revenue  
Agencies’ Experience With Collecting Non-Tax Debt  
Ken Buna, Fast Enterprises (Moderator), Vicki Siekert, Wisconsin,  
and Russ Hyatt, Montana**

**SESSION 2** Peachtree

**Electronic Filing: Oh, What a Tangled Web We Weave When  
First We Practice to ... Mandate!  
Darcy Pyle, Georgia and Garry Slobodian, Fast Enterprises**

**SESSION 3** Azalea

**Data Sharing and Data Sources: Technology, Strategy, and  
Policy ... What’s New?  
David Casey, Revenue Solutions, Inc.**

**11:00 a.m. – Noon**

**CONCURRENT SESSIONS**

**SESSION 1** Piedmont 1

**Expanding Collection Tools  
Jim Hale, CGI**

**SESSION 2** Peachtree

**Analytics Everywhere – Using Data to Improve Customer  
Compliance  
Dr. Satheesh Ramachandran, Elite Analytics and Ted London,  
CGI**

**SESSION 3 Azalea  
Fraud Detection – What You Don't Know Can Cost You  
Robert "Bubba" Lange, Zytax, a FuelQuest Company**

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**FTA Technology Conference Close**

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**Wednesday, August 4, 2010**

**1:30 p.m. - 5:00 p.m. – TIGERS e-Standards Meeting Azalea Room**

**IRS Update**

**Impact of New IRS Standards for XML**

**StateBusinessPackage/StateIndividualPackage2010V1.0 Status**

- **Status**
- **IAT for FinancialTransaction**
- **IRSForms**

**Thursday, August 5, 2010**

**8:30 a.m. - Noon – TIGERS e-Standards Meeting Azalea Room**

**FSETV4.3 Status and Review**

**Measure to ease the upgrade path for back-level states**

**New development**

**1:30 p.m. - 5:00 p.m. – TIGERS e-Standards Meeting Azalea Room**

**Motor Fuel Status Update**

**Sales and Use Taxes**

**-- NACTP Task Force – Overview and Objectives**

**-- Presentations of Sales Efile Program – Alabama and Georgia**

**TIGERS Full Electronic Return – Overview and Status**

**-- Next Steps**

**FIPS vs GNIS Codes – Next Steps for MTSA and Streamlined**