



# FTA bulletin

Federation of Tax Administrators  
444 N. Capitol St., N.W., #348, Washington D.C., 20001 • (202) 624-5890

B-14/05  
April 13, 2005

## ELECTRONIC FILING SYMPOSIUM MAY 15-18, 2005 • ATLANTA, GEORGIA

**To State Tax Administrators:**

### SUMMARY

The 2005 Electronic Filing Symposium will take place May 15-18 in Atlanta, Georgia, at the Renaissance Atlanta Downtown. Any individual interested in electronic filing for individual income taxes is encouraged to attend. In addition, there will be breakout sessions devoted to the electronic filing of business taxes and 2-D Barcode Standards.

A preliminary daily program is attached. FTA is in the process of gathering speaker names and will update this program as the information is received. Program updates and modifications will be posted to [www.taxadmin.org](http://www.taxadmin.org). Please check regularly for any updates. **Registration is also available online at [www.taxadmin.org](http://www.taxadmin.org).**

The FTA/NACTP sponsored 2-D Barcode standards group will meet the morning of May 18. Additional information on this session will be available on the FTA Web site later this month.

FTA, in cooperation with the IRS, is sponsoring the 2005 Electronic Filing Symposium May 15-18 in Atlanta, Georgia, at the Renaissance Atlanta Downtown. 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 the process established under the IRS's Modernized E-file program for development of new Fed-State E-file programs such as the 1120, 1065, and 1040. On Wednesday morning there will also be a working session on updating 2-D Barcode Standards.

**Registration** for the Symposium will begin on Sunday afternoon, May 15, from 3 p.m. to 6 p.m. The 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 7:00 p.m., and a continental breakfast will be available on all three mornings. Attendees will be treated to a "table topic" lunch on Tuesday that will provide additional networking opportunities. While no evening activities are planned, there will be area maps, restaurant lists and activity guides available at the registration desk. Dress for the symposium will be "business casual."

A preliminary program is attached to this bulletin. All program changes/updates will be posted to the FTA Web site ([www.taxadmin.org](http://www.taxadmin.org)) as they occur.

**For meeting details**, please contact Darrell Reeves at FTA at (202) 624-5892 or [darrell.reeves@taxadmin.org](mailto:darrell.reeves@taxadmin.org).

## Related Meetings

**State Coordinator Meeting.** State E-file Coordinators will meet Sunday, May 15, from 3:00 – 5:00 p.m. This meeting will provide states an opportunity to discuss filing season events, updates to the fed/state acknowledgement program, future planning, etc.

**2-D Barcode Standards – FTA/NACTP.** There will also be a meeting of the FTA/NACTP- sponsored 2-D Barcode Standards group on the morning of May 18. This group develops voluntary 2-D standards, and is now working on 2005-06 revisions. See [www.taxadmin.org/fta/edi/2-dcurrent.html](http://www.taxadmin.org/fta/edi/2-dcurrent.html) for more information (and again later this month for more specific agenda information). There is no registration fee to attend this meeting, but we ask that you check off the registration form in the appropriate place if you plan to attend.

**FTA-IRS Tactical Advisory Group (TAG).** The FTA-IRS Tactical Advisory Group, or TAG, is intended to provide advice and input on state-related issues related to electronic initiatives and issues for all IRS Business Operating Divisions and functional areas. Member representatives include Illinois, Delaware, Kansas, Arizona, South Carolina, and Virginia. The group meets on a quarterly basis. Areas of work include improvements to cooperative development of new Fed-State EF programs, individual and business E-file marketing, and joint electronic payments. States and IRS personnel are invited to come to this **government-only** meeting May 18-19 to observe and learn more about TAG work. There is no registration fee to attend this meeting, but we ask that you check off the registration form in the appropriate place if you plan to attend. Further information on TAG is available on TaxExchange at: <http://www.taxexchange.org/member/projects/projects.html>.

## Symposium Registration

Enclosed is the registration form for this meeting. **Please submit your registration by April 21, 2005.** Online registration is available at <http://www.taxadmin.org>. The symposium registration fee is:

**\$300** government and industry (includes Monday evening reception, Tuesday 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 29; after that date (except for emergencies) there will be a \$35 processing fee. We do not require that the payment accompany the registration form itself; it may be sent under separate cover.

## Hotel Registration

The symposium will be held at the Renaissance Atlanta Downtown, 590 West Peachtree Street, NW, Atlanta, GA 30308. The room rate is \$112 single or double occupancy plus taxes. **The hotel deadline for reservations is Thursday, April 21, 2005.** For reservations call 888-391-8724 or 404-881-6000. Please make sure you tell the hotel that you are

with the Federation of Tax Administrators. More information is available at <http://marriott.com/property/propertypage/atlbr>. You may also make your reservations from the hotel's Web site by using the Group Code [ftaftaa] [without the brackets].

Sincerely,

Harley T. Duncan  
Executive Director

Attachments: as stated

## 2005 Electronic Filing Symposium

### Program Outline

Following is a preliminary outline of the Symposium program, broken down by day. Speakers will be added to the program once confirmed. All changes/updates to this program will be posted to [www.taxadmin.org](http://www.taxadmin.org).

### Sunday, May 15

3:00 p.m.–6:00 p.m. Registration

3:00 p.m.–5:00 p.m. State E-file Coordinator Meeting (**Government Only**)

### Monday, May 16

7:30 a.m. Registration and Continental Breakfast

8:30 a.m. Welcome to Atlanta

8:45 a.m. IRS/ETA Initiatives including review of initiatives for individual and business tax electronic filing and filing season review and future initiatives.  
*Bert DuMars, Director, Electronic Tax Administration*

9:45 a.m. Open Forum

10:00 a.m. BREAK

10:20 a.m. NACTP State Electronic Filing Standards  
*Mark Castro, Orrtax*  
*Rebecca McCaulley, CCH*  
*Denise Elliott, Intuit*  
*Cindy Gervais, H & R Block*

11:20 a.m. Trends in State Electronic Filing  
*Harley Duncan, Executive Director, Federation of Tax Administrators*

Noon–1:30 p.m. Lunch (on your own)

1:30 p.m. Mandating Electronic Filing – Panel Discussion to Examine Trends in Individual and Business Tax Filing Mandates and Steps to Implementing a Successful Mandate  
*State, IRS, NACTP Representatives*  
*Federation of Tax Administrators*

- 2:40 p.m. FTA-IRS Tactical Advisory Group (TAG) Activities  
*Representatives, TAG*
- 3:10 p.m. BREAK
- 3:30 p.m. Filing Season Review & What's New for 2005 and Beyond – State Updates  
*Each state will speak briefly on the 2004 filing season and outline changes for the 2005 filing season and beyond*
- 5:30 p.m.–7:00 p.m. **Opening Reception with light hors d'oeuvres**

## **Tuesday, May 17**

- 7:30 a.m. Continental Breakfast
- 8:30 a.m. Free File Alliance – A Discussion with Participating Companies and States  
*Atilla Taluy, FileYourTaxes.com*  
*Russ Sprouse, Intuit*  
*Rebecca McCaulley, CCH*
- 9:20 a.m. State Retrieval System  
*Darryl Giles, IRS*
- 9:50 a.m. BREAK
- 10:10 a.m. Federal-State Acknowledgements – Review 1<sup>st</sup> Year and Examine Changes for 2006 Filing Season  
*Darryl Giles, IRS*  
*Carolyn E. Davis, IRS*
- 11:00 a.m. Uniformity Issues for Federal-State Acknowledgements  
*Jamie Stiles, Drake*  
*Squire Dahl, Orrtax*  
*State Representatives (invited)*
- 11:40 a.m. IRS Encryption Standards – Panel Discussion  
*Carolyn E. Davis, IRS*  
*Darryl Giles, IRS*  
*State Representatives (invited)*
- 12:00–1:30 p.m. Luncheon with Table Topics

1:30 p.m.–5:00 p.m. Concurrent Breakout Sessions

**Breakout A**

EFTPS Pilot – Panel Discussion

*Larry Faulkner, IRS*

*Kevin Richards, Illinois Dept. of Revenue*

*Walt Eccard, FMS*

*Orlando Evans, Bank of America*

Marketing New York Style

*Lynne Passarelli, New York State Dept. of Taxation & Finance*

Open Discussion Marketing Issues

Open Discussion on Issues related to 2005 Filing Season and Future Changes

*IRS, State, Software Developer*

**Breakout B**

Federal/State 1120, 1065, and Employment Tax – Background, Updates, and What You Should do to Prepare

*Joan Barr, IRS*

*Carol McLaughlin, IRS*

*State Representatives (invited)*

New Federal-State E-file Program Development Process

*Joan Barr, IRS*

*Carol McLaughlin, IRS*

*Terry Garber, South Carolina Dept. of Revenue*

Streamlined Sales, Federal/State 1120 and Federal/State Employment Tax Developments

*Terry Garber, South Carolina Dept. of Revenue*

State Business Tax Developments – Panel Discussion on Trends in Business Tax Filing

*State Representatives (invited)*

**Wednesday, May 18**

7:30 a.m. Continental Breakfast

8:30 a.m. 2-D Barcode Successes – Why Your State Should Join the Program!

*Donna Muccilli, Arizona Dept. of Revenue*

*Veronica Jennings, Alabama Dept. of Revenue*

*Ginger Hulsey, Oklahoma Tax Commission*

9:30 a.m.	BREAK
9:40 a.m.	Innovations in Internet Filing, Payment and Account Maintenance <i>State Representatives (invited)</i>
10:40 a.m.	BREAK
11:00 a.m.	E-Customer Service – Development, Promotion, Customer Service <i>State Representatives (invited)</i>
Noon	Adjourn

---

***The following breakout will run opposite Wednesday morning sessions noted above. Please make note of the 9:40 a.m. start time for the 2-D Standards group. This follows the 2-D panel presentation.***

9:40 a.m.- Noon	FTA/NACTP-Sponsored 2-D Bar Code Standards Working Group Meeting FTA, NACTP and State Representatives
-----------------	--

**Registration Form**

**Electronic Filing Symposium**

**May 15-18, 2005**

**Atlanta, Georgia**

**Remember, you can register online at <http://www.taxadmin.org>**

Name \_\_\_\_\_

Title \_\_\_\_\_

Agency/Company \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_ E-mail \_\_\_\_\_

**REGISTRATION FEE:** \_\_\_\_\_ **\$300** 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

\_\_\_ Payment will be made by voucher/purchase order

\_\_\_ Payment is enclosed

\_\_\_\_\_ Check \_\_\_\_\_ VISA \_\_\_\_\_ MasterCard

Name as it appears on card \_\_\_\_\_

Account Number \_\_\_\_\_ Expiration Date \_\_\_\_\_

Signature \_\_\_\_\_

**To plan accurately, will you be attending:**

\_\_\_\_\_ Monday reception \_\_\_\_\_ Tuesday lunch

\_\_\_\_\_ 2-D Barcode Standards, May 18 (no additional fee)

\_\_\_\_\_ TAG, May 18-19 (no additional fee—**government only**)

**SYMPOSIUM REGISTRATION DEADLINE IS APRIL 21, 2005**  
**An additional \$35 fee is assessed for all on-site registrants.**  
**Cancellations after April 29 will incur a \$35 fee (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  
444 N. Capitol Street, NW, Suite 348  
Washington, DC 20001