

DAY AT A GLANCE

Sunday, May 16, 2004

- 3:00 p.m. – 6:00 p.m. **Registration** (*18th Century Foyer*)
- 2:00 p.m. – 4:00 p.m. **State E-file Coordinator Meeting** (*18th Century Government Only*)
- 4:00 p.m. – 5:00 p.m. **State StACK Meeting** (*18th Century Government Only*)

Monday, May 17, 2004

- 7:30 a.m. **Registration** (*Plaza Ballroom Foyer*)
- 7:30 a.m. **Continental Breakfast** (*Plaza Ballroom Foyer*)
- 8:30 a.m. – 5:00 p.m. **General Session** (*Plaza Ballroom*)
- Noon – 1:30 p.m. **Lunch (on your own)**
- 5:30 p.m. – 7:00 p.m. **Reception with light hors d'oeuvres** (*20th Century*)

Tuesday, May 18, 2004

- 7:30 a.m. **Continental Breakfast** (*Plaza Ballroom Foyer*)
- 8:30 a.m. – Noon **General Session** (*Plaza Ballroom*)
- Noon – 1:30 p.m. **Lunch (provided)** (*19th Century*)
- 1:30 p.m. – 5:00 p.m. **Concurrent Breakout Sessions**
Breakout A (*Plaza Ballroom*)
Breakout B (*20th Century*)

Wednesday, May 19, 2004

- 7:30 a.m. **Continental Breakfast** (*Plaza Ballroom Foyer*)
- 8:30 a.m. – Noon **General Session** (*Plaza Ballroom*)

MONDAY, MAY 17, 2004

7:30 a.m. **Continental Breakfast** (*Plaza Ballroom Foyer*)

8:30 a.m. – 5:00 p.m. **General Session** (*Plaza Ballroom*)

8:30 a.m.

Welcome to Oklahoma City

Thomas E. Kemp, Jr., Chairman, Oklahoma Tax Commission

9:00 a.m.

IRS/ETA Initiatives

(*Overview of initiatives for individual and business tax electronic filing*)

Darius Taylor, Director, Development Services Division

10:00 a.m.

BREAK

10:30 a.m.

IRS Report: Filing Season in Review and Future Initiatives

(*Individual income tax electronic filing*)

Jimmy Smith, Director, Strategic Services Division

11:15 a.m.

NACTP Report on Filing Season

Andrea Bibb, Jackson Hewitt Tax Service

Mark Castro, Orrtax Software, Inc.

Cindi Gervais, H&R Block

Rebecca McCaulley, CCH Incorporated

Noon – 1:30 p.m.

Lunch (on your own)

1:30 p.m.

Review of Filing Season Plus State Initiatives for 2004 and Beyond

Each state will provide a recap of the 2004 filing season and speak briefly on changes for 2005 and beyond

2:15 p.m.

Federal-State Acknowledgements for 2005

Darryl Giles, IT Specialist, IRS

3:00 p.m.

BREAK

3:30 p.m.

State Planning and Uniformity Issues for Federal-State Acknowledgements

Steve Thimsen, Idaho State Tax Commission

Jerry Wingate, Missouri Dept. of Revenue

4:15 p.m.

IRS Encryption Standards

Carolyn E. Davis, Senior Program Analyst, IRS

Frank Kist, Director, IRS Enterprise Networks

Paul Masucci, IT Specialist, IRS

Kevin Richards, Illinois and TAG Member

5:30 p.m. – 7:00 p.m. **Reception with light hors d'oeuvres** (*20th Century*)

TUESDAY, MAY 18, 2004

7:30 a.m.

Continental Breakfast (*Plaza Ballroom Foyer*)

8:30 a.m. – Noon

General Session (*Plaza Ballroom*)

8:30 a.m.

Review of Mandatory Electronic Filing for Individual Income Tax

Marcia Gray, Wisconsin Dept. of Revenue

Bill Grewe, Minnesota Dept. of Revenue

Michael Kaufmann, Oklahoma Tax Commission

Annette Olivier-Wolfe, Michigan Dept. of Treasury

Mark Castro, Orrtax Software, Inc.

Rebecca McCaulley, CCH Incorporated

9:45 a.m.

BREAK

10:10 a.m.

Panel: State Free File Alliance – Report on 2004 Filing Season

Bill Grewe, Minnesota Dept. of Revenue

Michael Guerin, Massachusetts Dept. of Revenue

Annette Olivier-Wolfe, Michigan Dept. of Treasury

Helen Pelersi, New York State Dept. of Taxation and Finance

11:10 a.m.

State-Developed Electronic Filing Products

Lee Mikelson, Virginia Dept. of Taxation

Meggan Swisher, Pennsylvania Dept. of Revenue

Noon – 1:30 p.m. **Luncheon with Table Topics** (*19th Century*)

1:30 p.m. – 5:00 p.m. **Concurrent Breakouts**

Breakout A
(Plaza Ballroom)

1:30 p.m.

Federal-State Marketing Strategies
Samuel Farrow, Program Analyst, IRS

2:15 p.m.

Federal-State 1120, 1065, 1041 and Employment Tax – Background
Dayna Sefcik, Supervisory Program Analyst, IRS
Joan Barr, Technical Requirements Manager, IRS

3:00 p.m.

BREAK

3:30 p.m.

Streamlined Sales, Federal-State 1120 and Federal-State Employment Tax XML Developments
Terry Garber, South Carolina Dept. of Revenue, TIGERS Chair

Breakout B
(20th Century)

1:30 p.m.

FTA/NACTP-Sponsored 2-D Bar Code Standards Working Group Meeting
FTA, NACTP and State Representatives

WEDNESDAY, MAY 19, 2004

7:30 a.m. **Continental Breakfast** (*Plaza Ballroom Foyer*)

8:30 a.m. – Noon **General Session** (*Plaza Ballroom*)

8:30 a.m.

FTA Update on State Electronic Filing Initiatives

Harley Duncan, Executive Director, Federation of Tax Administrators

9:15 a.m.

FTA-IRS E-Government Tactical Advisory Group Activities

Representatives, TAG

10:30 a.m. BREAK

11:00 a.m.

IRS and State E-Services Initiatives

Tom Parisi, Supervisory Program Analyst, IRS

Frank Lanza, California Franchise Tax Board

Joel Schensul, New York State Dept. of Taxation & Finance

OTHER MEETINGS

Wednesday, May 19, 2004

1:00 p.m. – 4:30 p.m. **Forum on Electronic Filing Policy Issues** (*Green Country*)

The Forum is intended to give interested parties an opportunity to present their views on issues of interest to them regarding the electronic filing of state tax returns and on their ideas for increasing electronic filing of state tax returns. The Forum is part of a process being undertaken to respond to concerns that have been expressed regarding the implementation of mandates for electronic filing by some states. Its aim is to begin a dialogue on a broad range of issues involving electronic filing and ways to increase electronic filing at the state level.

Thursday, May 20, 2004

8:30 p.m. – 3:00 p.m. **FTA-IRS Tactical Advisory Group (TAG)** (*Red Carpet*)
Government Only

The FTA-IRS Tactical Advisory Group, or TAG, is intended to provide advice and input on state-related issues concerning electronic initiatives and issues for all IRS Business Operating Divisions and functional areas. Member representatives include California FTB, Illinois, Maryland, New York, South Carolina, and Virginia. The group meets on a quarterly basis. Among the areas being examined are possible improvements to joint (individual and business) e-file marketing, IRS technical development schedules, and electronic filing models. States are invited to come to this government-only meeting to observe and learn more about TAG work.