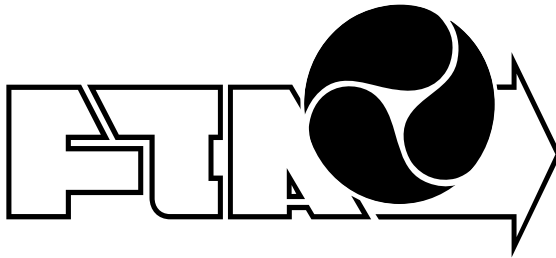


FEDERATION OF TAX ADMINISTRATORS

ELECTRONIC FILING SYMPOSIUM



**May 4-7, 2003
Indianapolis, Indiana**

DAY AT A GLANCE

Sunday, May 4, 2003

- 3:00 p.m. – 7:00 p.m. **Registration** (*Regency A/B Foyer*)
- 2:00 p.m. – 4:00 p.m. **State E-file Coordinator Meeting**
(*Regency A & B*)
Government Only
- 4:00 p.m. – 5:00 p.m. **State StACK Meeting**
(*Regency A & B*)
Government Only

Monday, May 5, 2003

- 7:30 a.m. **Registration** (*Regency A/B Foyer*)
- 7:30 a.m. **Continental Breakfast**
(*Regency A/B Foyer*)
- 8:30 a.m. – 3:00 p.m. **General Session** (*Regency A & B*)
- 3:00 p.m. – 4:00 p.m. **Concurrent Breakout Sessions**
 Breakout A (*Regency A & B*)
 Breakout B (*Mt. McKinley*)
- 4:00 p.m. – 5:15 p.m. **IRS/State Briefing/Question & Answer
Session on Development of Federal/State
Acknowledgements for 2005**
(*Regency A & B*)
Government Only
- 5:30 p.m. – 7:00 p.m. **Reception with light hors d'oeuvres**
(*Regency C & D*)

MONDAY, MAY 5, 2003

7:30 a.m.

Continental Breakfast
(Regency A/B Foyer)

8:30 a.m. – 3:00 p.m.

General Session
(Regency A & B)

8:30 a.m.

Welcome to Indianapolis

Kenneth L. Miller, Commissioner, Indiana Dept. of Revenue

9:00 a.m.

Free File Alliance

Michael Cavanaugh, Manager, Free File Alliance

Stephen Ryan, Counsel, Free File Alliance

Paul Mamo, Acting Director, e-Government Program Office

9:45 a.m.

BREAK

10:15 a.m.

IRS Report: Filing Season in Review and Future Initiatives

Julie Burpo, Chief, e-file Products Section

11:15 a.m.

NACTP Report on Filing Season

Rebecca Harris, CCH Incorporated

Lynn Tenney, TaxWorks

Cindi Gervais, H&R Block

Noon – 1:30 p.m.

Lunch (on your own)

1:30 p.m.

State-Only/Multiple State Filing: The First Year

Moderators:

Mark Castro, Orrtax

Jamie Stiles, Drake Software

Jerry Wingate, Missouri Dept. of Revenue

2:30 p.m.

BREAK

3:00 p.m. – 4:00 p.m. **Concurrent Breakouts**

Breakout discussion groups organized by computing centers. To involve federal and state electronic filing coordinators, software developers and IRS service/ computing center representatives.

Breakout A Martinsburg Computing Center
(Regency A & B)

Breakout B Tennessee/ Austin Computing Centers
(Mt. McKinley)

4:00 p.m. – 5:15 p.m. **IRS/State Briefing/Question & Answer Session
on Development of Federal/State
Acknowledgements for 2005**
(Regency A & B)
Government Only

5:30 p.m. – 7:00 p.m. **Reception with light hors d’oeuvres**
(Regency C & D)

DAY AT A GLANCE

Tuesday, May 6, 2003

7:30 a.m.	Continental Breakfast <i>(Regency A/B Foyer)</i>
8:30 a.m. – Noon	General Session <i>(Regency A & B)</i>
Noon	Lunch (provided) <i>(Mt. McKinley / Mt. Rainier)</i>
1:30 p.m. – 5:00 p.m.	Concurrent Breakout Sessions Breakout A <i>(Salon A)</i> Breakout B <i>(Regency A & B)</i>

TUESDAY, MAY 6, 2003

7:30 a.m.

Continental Breakfast
(Regency A/B Foyer)

8:30 a.m. – Noon

General Session
(Regency A & B)

8:30 a.m.

IRS/ETA Initiatives and Free File Alliance

Terrence H. Lutes, Director, Electronic Tax Administration

9:30 a.m.

Review of 2003 Filing Season / What's New for 2004 and Beyond – State Updates

Each state will provide an overview of the 2003 filing season and speak briefly on changes for the 2004 filing season and beyond

10:30 a.m.

BREAK

10:50 a.m.

One State's Approach to Marketing Electronic Filing Programs

Marcia Gray, Wisconsin Dept. of Revenue

11:20 a.m.

IRS Marketing Strategies

Candice Cromling, Chief, Relationship Management

Noon – 1:30 p.m.

Luncheon with Table Topics
(Mt. McKinley / Mt. Rainier)

1:30 p.m. – 5:00 p.m.

Concurrent Breakouts

Breakout A
(Salon A)

1:30 p.m.

Introducing the New and Exciting Fed-State Employment Tax E-Filing Program

Pat Clarke, IRS

Terry Garber, South Carolina Dept. of Revenue, TIGERS Chair

Jo Ann Costa, California Employment Development Dept.

2:15 p.m.

BREAK

2:45 p.m.

FSET Software Developers Tell All: Solutions for Fed-State Employment Tax

Moderators:

John Myett, IRS

Software Developers: PayCycle, Creative Solutions, FileYourTaxes.com

3:30 p.m.

BREAK

4:00 p.m.

How To Do It – FSET Setup, Process, and Maintenance

Tracy Green-Caster, IRS

Terry Garber, South Carolina Dept. of Revenue, TIGERS Chair

Jo Ann Costa, California Employment Development Dept.

Breakout B

(Regency A & B)

1:30 p.m.

Secure Customer Service – One State’s Perspective

Nonie Manion, New York State Dept. of Taxation and Finance

2:15 p.m.

BREAK

2:45 p.m.

eCheck Online Tax Payments

Kenneth L. Miller, Commissioner, Indiana Dept. of Revenue

Marilyn Cooksey, ITD Administrator, Indiana Dept. of Revenue

David Becker, CEO, First Internet Bank of Indiana

3:30 p.m.

BREAK

4:00 p.m.

Panel: State Free File Alliance Initiatives

Sandy Sharpe, Georgia Dept. of Revenue

Floyd Schmitzer, Michigan Dept. of Treasury

Nonie Manion, New York State Dept. of Taxation and Finance

DAY AT A GLANCE

Wednesday, May 7, 2003

7:30 a.m.

Continental Breakfast
(Mountain Suites Foyer)

8:30 a.m. – Noon

Concurrent Breakout Sessions
Breakout A *(Mt. McKinley)*
Breakout B *(Mt. Rainier)*

WEDNESDAY, MAY 7, 2003

7:30 a.m.

Continental Breakfast
(Mountain Suites Foyer)

8:30 a.m. – 12:00 Noon **Concurrent Breakouts**

Breakout A
(Mt. McKinley)

10:00 a.m.

FTA/NACTP-Sponsored 2-D Barcode Standards Working Group Meeting

FTA, NACTP, State Representatives

Breakout B
(Mt. Rainier)

8:30 a.m.

Overview of Streamlined Sales Tax Project (SSTP) XML Initiatives

Terry Garber, South Carolina Dept. of Revenue, TIGERS Chair

9:15 a.m.

FTA/IRS Tactical Advisory Group Overview

Frank Lanza, California Franchise Tax Board, TAG Chair

10:00 a.m. BREAK

10:30 a.m.

Electronic Filing of Business and Employment Taxes

Sylvia Berry, Program Analyst, IRS

Rebecca Harris, CCH Incorporated

Atilla Tulay, FileYourTaxes.com

OTHER MEETINGS

Wednesday, May 7, 2003

1:30 p.m. – 5:00 p.m. **TeleFile Kick-off**
(Mt. McKinley)
Government Only

Thursday, May 8, 2003

8:30 a.m. – Noon **TeleFile Kick-off**
(Mt. McKinley)
Government Only

1:30 p.m. – 5:00 p.m. **XML Standards Working Meeting –
Tax Information Group for EC Requirements
Standardization (TIGERS)**
(Salon A)

Friday, May 9, 2003

8:30 a.m. – Noon **XML Standards Working Meeting –
Tax Information Group for EC Requirements
Standardization (TIGERS)**
(Salon A)

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