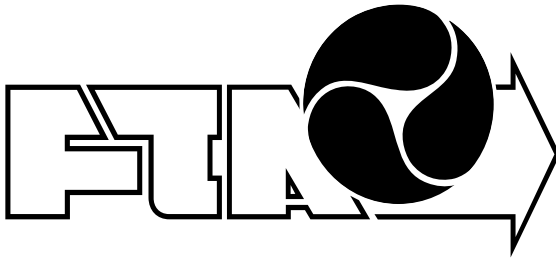


# **FEDERATION OF TAX ADMINISTRATORS**

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