



Tactical Advisory Group Update

Vicki R. Siekert

Wisconsin Department of Revenue
TAG Member 2007-08

MSATA Conference – August 2008

TAG History



- **What is TAG?**
 - Chartered in 2003
 - Representatives of 6 states & key IRS executives
 - TIGERS liaison
 - Determine state interest in e-initiatives

Focus of TAG



- E-commerce projects, primarily e-filing
- Projects that benefit both states and IRS
- Transitioning from legacy fed-state e-filing system to modernized e-file

TAG Success Stories



- Fed State 1120, 1120 S and 1065
- MLI – Multi Language Initiative
- Joint Marketing
 - Fed/State Ads
 - Best practices for e-file marketing
- ERO registration
- State mobilization for MEF 1040

Current Projects



- **Electronic Federal Tax Payment System - EFTPS**
- Phase 1 went live January 2007
- Pilot effort: IRS, FMS, BofA, IL, & SC
- Evaluating further expansion opportunities including batch and phone

TAG Security Subcommittee



- Composed of state and IRS information security officers
- Hosted the first-ever FTA Computer Security Conference in 2007
- Reviewed high-level policy and instrumental in providing state input to new Publication 1075

Compliance Issues



- Fraudulent Prisoner Returns
- GL inquiry on W-2 Lockout letters
 - Testing with North Carolina, South Carolina and Kansas

Future TAG Initiatives State Survey



- TAG surveyed Commissioners and senior staff of states
 - To prioritize direction of future TAG initiatives through survey
 - To identify contact points who can participate in teleconference and brainstorm
- Subject areas: audit, collections, criminal enforcement, data matching/mining/warehousing, improving agency performance, internal operations, online or e-filing, technology, voluntary compliance

State Survey – Commissioner Prioritization



1. On-Line Filing or E-filing
2. Data Matching/Data Mining/Data Warehousing
3. Voluntary Compliance
4. Internal Operations
5. Audit
6. Improving Agency Performance
7. Collections
8. Technology
9. Criminal Enforcement

Follow-up Teleconference



- Three top priorities
 - Joint Fed/State Extension Project - allow a taxpayer to file one electronic submission for Federal and state extension
 - W-2 Informational Filing Program for Employers - allow joint employer filing of W-2's
 - Form 1041 (estates and trusts) Modernized E-file program

Next Steps



- Discuss with IRS on prioritization of IRS and state e-initiatives
- Goal - Must be mutually beneficial

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[Research/Information Exchange](#)

[Interstate/FedState Coordination](#)

[Compliance/Audit Issues](#)

[Find People/Directories](#)

[Publications/Reports](#)

[STEAL-IT](#)

[Listserv Responses](#)

[Special Projects](#)

[Federal Legislation](#)

[IRS/Federal Agencies](#)

[Legal Issues](#)

[Tobacco Tax Section](#)

[Research/Tax Policy](#)

[Electronic Tax Administration](#)

[Motor Fuel Section](#)

[Exchange Agreement](#)

[MTC Nexus](#)

hot topics

[JCT Paper on Economic Stimulus](#)

[Includes Design Issues for Implementing Individual Tax Rebates]

[IRS Pub. 1075 -- Safeguard and Security Guidelines for Federal Return Information](#)

[FTA Bulletin 03/08 on New Pub. 1075][January 2008]

[Nominations Accepted for FTA Awards](#)

[in Leadership, Technology, and Research]

[New Listserv Responses Posted](#)

[10 New Responses Added] [January 8, 2008]

[Survey of State Statistical Sampling Audit Practices](#)

[FTA Survey] [updated May 2007]

[IRS - The Budget in Brief - FY 2009](#)

[IRS - February 2008]
[more IRS information]

Meetings

[FTA Midwinter Commissioners' Meeting](#), Chandler, AZ, Feb. 8-9, 2007

[FTA Compliance Workshop](#), San Diego, CA, Feb. 24-27, 2008

[FTA/IRS Safeguard Workshop](#), St. Louis, MO, Mar. 31-Apr. 2, 2008

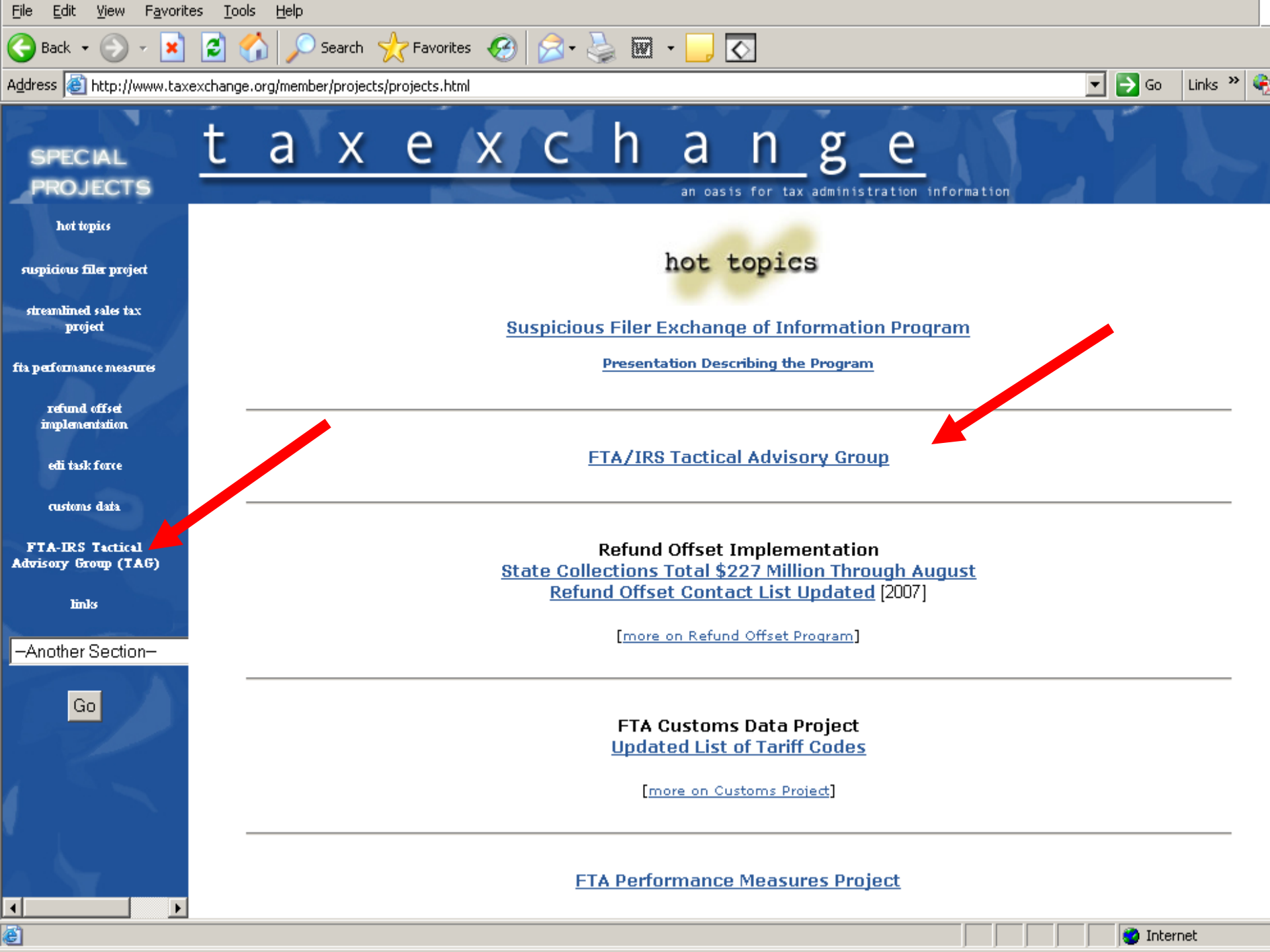
[FTA/IRS Computer Security Workshop](#), St. Louis, MO, Apr. 2-3, 2008

[more on Meetings](#)

Publications

TaxExpress - February 19, 2008
LAST WEEK ON THE HILL





SPECIAL PROJECTS

- hot topics
- suspicious filer project
- streamlined sales tax project
- fta performance measures
- refund offset implementation
- edi task force
- customs data
- FTA-IRS Tactical Advisory Group (TAG)**
- links

-Another Section-

Go

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hot topics

[Suspicious Filer Exchange of Information Program](#)

[Presentation Describing the Program](#)

[FTA/IRS Tactical Advisory Group](#)

Refund Offset Implementation
[State Collections Total \\$227 Million Through August](#)
[Refund Offset Contact List Updated](#) [2007]

[\[more on Refund Offset Program\]](#)

FTA Customs Data Project
[Updated List of Tariff Codes](#)

[\[more on Customs Project\]](#)

[FTA Performance Measures Project](#)

Recruitment Announcement



- Executive level participation in setting direction for Fed/State e-initiatives
- Three face-to-face meetings each year
- State membership rotated, with 3 states replaced each year
- If your state is interested, please contact Jonathan Lyon, FTA
 - Jonathan.Lyon@taxadmin.org
 - Phone 202-624-5894

Questions?



TAG co-chairs:

Jerry Coble, North Carolina DOR

Jerry.Coble@dorncc.com

919-733-5501

Cassandra Daniels, IRS

Cassandra.M.Daniels@irs.gov

202.283.2178