



2012

Electronic Filing: Modernized e-File and Legacy

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Agenda

2012 Filing Season Update

2013 Filing Season Plans

MeF Service Requests Usage Guidelines

- for Transmitters
- for States

Key e-file Dates

Software Testing

- ATS
- PATS

Communications

Contingency Plan and Questions & Answers



2012 Filing Season Update

- TY 2011 schema package version 4.1 will NOT be deployed to the ATS or Production environments in 2012
- MeF will stop supporting use of the DIME format as of October 1, 2012 - MeF will only accept the MIME or MTOM format.
- Extended Labor Day Power Outage
 - MeF and ELF will shut down by 4:00 pm, Eastern on Friday, August 31, 2012
 - MeF and ELF will become operational after Noon, Eastern on Tuesday, September 4, 2012



2013 Filing Season Plans

- Adding Schedule CTC (Form 1040), *Child Tax Credit* to the 1040-related schema package to replace Form 8812, *Additional Child Tax Credit* (MeF only)
- Tentative Application-to-Application (A2A) Toolkit enhancements
 - WSDL may change
 - Will use 64-bit zip archive utility
- Proposed: States will be able to retrieve up to 200 submissions using Get New Submissions
- Proposed: States will be able to retrieve up to 500 submissions IDs in a Get Submissions Reconciliation List
- Provider page on irs.gov will contain the software company name and address and a link to their company web site



MeF Service Requests Usage Guidelines

- MeF offers rapid processing of receipts and acknowledgements. The expected response times are:
 - Acknowledgements in 5 minutes or less from the receipt of submissions (non-peak periods)
 - Acknowledgements in 2 hours or less from the receipt of submissions (peak periods)
- Achieving these response times depends on Trading Partners/States using the MeF System as per guidelines



MeF Service Requests Usage Guidelines for Transmitters

- MeF strongly recommends using **Get Acks** Service for retrieving Acknowledgements
 - **Get Acks** Service should be used instead of **Get New Acks** Service
- Optimize the frequency of invoking service requests
 - To retrieve Federal Acks, wait for 5 minutes after sending submissions
 - Once a service request returns no Acks, wait for 5 minutes before attempting to retrieve again, still none, then increase the interval
 - To retrieve State Acks, wait for 12 to 24 hours after sending State submissions. (MeF denied Acks are immediately available)
 - If after 24 or 48 hours, State Acks are still not received, stop attempting to retrieve them, check the submission status (using **Get Submissions Status** Service) and take appropriate action
 - Separate Federal and State Ack retrievals
 - Federal and State Acks should not be retrieved in same service request
 - Once all Acks are retrieved, stop sending service requests



MeF Service Requests Usage Guidelines for States

- MeF recommends using **Get New Submissions Service** for retrieving Submissions
 - This service pulls State submissions that have been batched into separate files every hour for each state category. This is the most efficient way to retrieve submissions.
 - **Get Submissions** does not use batched submission files and is not an efficient way to retrieve submissions
- When a **Get New Submissions** results in a timeout, or the response is not received or is lost after retrieval, the submissions cannot be retrieved using a second **Get New Submissions** request
 - **Get Submissions by Message ID** should be used to retrieve submissions that were not received or were received but lost
 - The **Get Submission Reconciliation List/ Get Submissions** service combo should not be used to retrieve these submissions. However, states should run Reconciliation List to identify any outstanding submissions.



Key e-file Dates

Tentative dates:

October 19, 2012 – IMF Shutdown - 1040 ELF (Legacy)

November 5, 2012 - ATS Startup – all MeF

November 13, 2012 – PATS Startup – Contingency Plan testing

November 23, 2012 – IMF Shutdown – 1040 MeF

December 3, 2012 – Form 1041 BATS Startup

December 15, 2012 – January 2, 2013 – EMS Cutover (downtime)

December 26, 2012 – BMF Shutdown – BMF MeF forms

December 26, 2012 – January 6, 2013 – MeF Cutover (downtime)

January 3, 2013 – Form 94X Startup – Legacy only

January 7, 2013 – BMF Startup – BMF MeF forms

January 22, 2013 – IMF Startup (MeF is only system operating)

January 28, 2013 – Form 1041 Startup – Legacy only



Software Testing -ATS

Assurance Testing System (ATS) - 1040 MeF

- Opens Monday, November 5, 2012 (IMF & BMF) and daily calls begin
- ATS Known Issues are posted to irs.gov at <http://www.irs.gov/efile/article/0,,id=168537,00.html>
- 1040 MeF Testing supported by Austin and Andover e-Help
- Form 8938, *Statement of Foreign Financial Assets* and Schedule CTC (Form 1040), *Child Tax Credit* are new forms to be tested

16 Proposed Test scenarios for Tax Year 2012 ATS Testing

- 1 Form 1040 shared with 1040 ELF (Legacy) – Contingency Plan
- 1 Form 1040A shared with 1040 ELF (Legacy) – Contingency Plan
- 1 Form 1040EZ shared with 1040 ELF (Legacy) – Contingency Plan
- 7 Form 1040 scenarios unique to MeF
- 1 Form 1040SS (PR)
- 1 Form 4868 with payment
- 1 Form 4868 without payment
- 1 Form 2350 without payment
- 1 Form 56 scenario
- 1 Form 9465 scenario



Software Testing -PATS

Participants Acceptance Testing System (PATS) - 1040 ELF (Legacy) - Contingency Plan testing

- Opens Tuesday, November 13, 2012
- 1040 ELF Test Scenarios
 - 3 Test scenarios for Tax Year 2012 PATS Testing
 - 1 Form 1040 shared with MeF
 - 1 Form 1040A shared with MeF
 - 1 Form 1040EZ shared with MeF



Communications

- **QuickAlerts – issue “Technical” alerts**
- **Mailbox inquires – mefmailbox@irs.gov**
- **MeF Status Page on [irs.gov](http://www.irs.gov) at:
<http://www.irs.gov/efile/article/0,,id=168537,00.html>**
- **Quarterly technical calls for all MeF Software Developers and States**
- **Filing Season Calls with Developers, Transmitters and States:**
 - **ATS November 5, 2012 – begins daily, then moves to weekly**
 - **BMF Startup on January 7, 2013 – begins daily continuing throughout the peak filing season. Call frequency will taper off to weekly based on customer needs. Please monitor the MeF Status page on irs.gov to find the call schedule and call-in number**



Contingency Plan and Questions & Answers

Open discussion