



**2011**

## **Modernized e-file Update**

*presented by*

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# 2011 Filing Season

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## Total MeF (business + individual submissions)

- Transmitted = 20.3 million
- Federal submissions = 17.8 million
- Fed/State submissions = 2.54 million

## Total Federal Submissions Breakout

- Accepted = 16.1 million
- Rejected = 1.7 million
- Overall MeF Reject Rate is 9.55%

## Total Fed/State Breakout

- Fed/State (Linked) Made Available = 1.13 million
- Fed/State (Unlinked) Made Available = 1.41 million



# 2011 Filing Season (continued)

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## **1040 MeF Subset**

- Transmitted = 11.1 million
- Accepted = 9.8 million
- Rejected = 1.3 million
- Reject rate of 11.7% is slightly lower than 1040 ELF (12.6%)
- 19 companies in production

## • **Top Three Reject Conditions**

- F1040-679-01 Primary Electronic Filing PIN Mismatch
- R0000-504 Dependents SSN/ Name Control Mismatch
- F1040-680-01 Secondary Electronic Filing PIN Mismatch

## • **1040 MeF Fed/State Subset**

- Transmitted = 673,000
- Fed/State (Linked) Made Available = 584,000
- State Standalone (Unlinked) Made Available = 89,000



# 2011 Filing Season (Continued)

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## System Performance

- Minimal unscheduled production downtime – 13 hours around March 16<sup>th</sup>.
- Consistent Acknowledgement retrieval time - less than 5 minutes during non-peak periods.
- Only processing delay was due to the IMF and BMF Extender legislation. The 1040 Schedule A went into production on Sunday, Feb. 13<sup>th</sup> and the list of BMF forms went into production on March 6<sup>th</sup>.
- In partnership with MITS, continuing the Performance Enhancement Team (PET) efforts in preparation for the 2012 filing season.

# MeF Roadmap

Forms Supported on MeF and Year Deployed		
Corporations	1120, 1120S 1120-F	(2004) (2008)
Exempt Organizations	990, 990EZ, 990PF, 1120POL 990-N (e-postcard) 990 Redesign	(2004) (2008) (2009)
Partnerships	1065, 1065-B	(2007)
Excise Tax	2290 720, 8849	(2007) (2008)
Extensions	7004 8868	(2005) (2004)
Individual	Phase 1 – 23 Forms Phase 2 – Infrastructure Phase 3 – Remaining 1040 Forms/Schedules	(2010) (2011) (2012)
Employment Tax	94x form family	(2013)
Estates and Trusts	1041	(2014)

We Are Here





# 1040 MeF Industry/State Snapshot

Number of Transmitters that Support each State	States Participating in MeF	Transmitter 1	Transmitter 2	Transmitter 3	Transmitter 4	Transmitter 5	Transmitter 6	Transmitter 7	Transmitter 8	Transmitter 9	Transmitter 10	Transmitter 11	Transmitter 12	Transmitter 13	Transmitter 14
2	AL	Y		Y											
1	AR	Y													
6	CO	Y	Y	Y	Y		Y	Y							
1	CT	Y													
5	GA	Y	Y	Y		Y			Y						
3	ID		Y	Y	Y										
3	IL			Y			Y	Y							
3	IN	Y	Y		Y										
10	KS	Y	Y		Y	Y	Y	Y	Y	Y	Y		Y		
3	LA		Y		Y	Y									
1	MD											Y			
2	ME	Y		Y											
6	MI	Y	Y	Y	Y	Y	Y								
4	MO	Y		Y	Y	Y									
3	MT		Y		Y	Y									
1	ND	Y													
6	NE	Y	Y	Y	Y	Y		Y							
1	OH		Y												
5	OK	Y	Y		Y	Y	Y								
7	OR	Y	Y	Y	Y	Y	Y			Y					
1	PA	Y													
4	RI		Y	Y	Y		Y								
2	SC	Y		Y											
7	UT	Y	Y	Y	Y		Y	Y	Y						
3	VA	Y		Y	Y										
6	WI	Y	Y	Y	Y	Y			Y						
0	WV														
<b># of States Supported</b>		<b>19</b>	<b>15</b>	<b>15</b>	<b>15</b>	<b>10</b>	<b>8</b>	<b>5</b>	<b>4</b>	<b>2</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>0</b>	<b>0</b>



# States/Municipalities Not MeF Production-Ready

State Name	MOU Signed	IRS is aware of plans to support MeF in 2012
Arizona	N	Y
Delaware	y	Y
<b>District of Columbia</b>	<b>N</b>	<b>N</b>
Hawaii	N	Y
Iowa	Y	Y
Kentucky	Y	Y
Minnesota	N	Y
Mississippi	N	Y
<b>New Hampshire</b>	<b>N</b>	<b>N</b>
New Jersey	N	Y
New Mexico	Y	Y
New York	N	Y
<b>New York City</b>	<b>N</b>	<b>N</b>
North Carolina	N	Y
<b>Vermont</b>	<b>Y</b>	<b>N</b>



# Help and Support is Available

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## Conference Breakout Sessions

- MeF 1040 Industry and State Adoption

*This session will look at the factor/barriers to MeF adoption and discuss possible recommendations for greater participation.*

- MeF Support

*This session will provide information on Filing Season 2012 readiness and support available to you.*

- MeF Application to Application Toolkit

*This session will provide and overview of the A2A toolkit and another information required to develop and deploy your MeF System.*



## Help and Support is Available (continued)

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- MeF 1040 web pages on [irs.gov](http://irs.gov)
  - For all things MeF
- MeF Mailbox
  - Email Address: [mefmailbox@irs.gov](mailto:mefmailbox@irs.gov)
  - Questions on schemas or other technical issues concerning the program
  - Key questions/answers will be posted to [irs.gov](http://irs.gov) as Frequently Asked Questions (FAQs)
- MeF Status Page at <http://www.irs.gov/efile/article/0,,id=168537,00.html>
- Calendar of Events is posted at <http://www.irs.gov/efile/article/0,,id=206086,00.html>
  - 1040 Executive Council Meetings (monthly)
  - 1040 Working Group Conference Calls (monthly)
  - Schema walk-through Conference Calls (TBD)



# Key Messages

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## **1040 Legacy Shutdown:**

IRS will deploy the last phase of the 1040 Modernized e-File (MeF) Program for Filing Season 2012. MeF Release 7 will enable electronic filing of all 1040 forms and schedules. In preparation for increased Industry and State participation, the IRS expanded the MeF disaster recovery capabilities and implemented a number of improvements to increase system stability and performance. Filing Season 2012 is the last year that Legacy 1040 e-File and 1040 MeF will operate in parallel. Industry and States should be aware that the IRS is on schedule to permanently shutdown (retire) the Legacy 1040 e-File system in October 2012. The IRS is committed to working with Industry and States as they develop and execute their plans to migrate to the MeF Platform.

## **Volume Control Message:**

IRS has no plans to impose any kind of volume controls on Transmitters or States who send returns to Modernized e-File (MeF) during Filing Season 2012. IRS made significant changes to its infrastructure and applications prior to Filing Season 2011 resulting in little unscheduled downtime and greatly improved system performance. IRS is continuing to execute its performance improvement plan in preparation for Filing Season 2012 with the objective of maintaining its performance goals of making acknowledgements available within 5 minutes during non peak days/hours and within 2 hours during peak days/hours.

# Questions

