



Modernized e-File (MeF) Update

Software Developer Conference
June 30, 2010

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AGENDA

- **Filing Season Recap**
- **Deployment Schedule**
- **Key Dates**
- **Communications**
- **Partnering Efforts**



Filing Season Recap

Key Statistics (as of 04/21/2010)

- **Overall MeF (BMF and IMF combined)** *BMF go live was 01/04/2010*
 - Total Fed/State Submitted: 6,913,810
 - Federal Submitted: 6,527,491
 - Federal Accepted: 5,177,847
 - Federal Rejected: 1,349,644
 - State Submitted: 386,319
 - Largest number of MeF receipts in a single day = 498,349 on March 15th
- **1040 MeF** *IMF go live was 2/17/2010*
 - Total Fed/State Submitted: 1,095,723
 - Federal Submitted: 1,064,235
 - Federal Accepted: 904,965
 - Federal Rejected: 159,270
 - State Submitted: 31,488
- **Participants:** 12 states (CO, GA, ID, KS, MI, MT, NE, OH, OR, RI, UT, WI).
- **1040 MeF has 10 Transmitters currently participating.**
- **Rejects/ERS fallout:** Top 3 1040 MeF reject trends are almost identical to 1040 ELF: Electronic PIN, Schedule M amount, and Secondary Taxpayer PIN. 1040 ELF rejects 13% of transmitted returns and 1040 MeF rejects 14%. ERS fallout pattern is almost identical to 1040 ELF.





Deployment Schedule*

- **Phase I – In Production (thanks to everyone)**

- Form 1040 and 22 other forms/schedules:

Sch A	Sch E	Sch SE	2441	8812	8888
Sch B	Sch EIC	1099-R	4562	8829	W-2
Sch C	Sch M	2106	4868	8863	
Sch D	Sch R	2210	8283	8880	

- **Phase II – January 2011**

- Current TY 2010 (23 forms)
- Prior TY 2009 (23 forms)
- Code optimization and additional hardware

- **Phase III – January 2012**

- Approximately 125 additional forms/schedules
- Current TY 2011 (148+ forms)
- Prior TY 2010 and Prior TY 2009 (23 forms)

* The deployment schedule is subject to change base on agency priorities and budget allocation. IRS will notify external stakeholders as soon as possible if plans change.





Key Dates

- **Software Developer Testing**
 - **MeF Assurance Testing System (ATS)** – Target **November 2010**
 - Test scenarios shared with current 1040 e-file
 - No Answer Key provided in publications; e-Help Assistors will have it
 - e-Help support will be provided
 - Will be staffed to support MeF 1040 and current 1040 e-file
- **TY 2010 Schemas will be published at the earliest date possible**
- **MeF 1040 related publications will be posted to irs.gov:**
 - **Pub 1345:** Handbook for Authorized IRS e-file Providers of Individual Income Tax Returns – Target **September 2010**
 - **Pub 1436:** Test Package for Electronic Filers of Individual Tax Returns – Target **September 2010**
 - **Pub 4164:** Modernized e-File Guide for Software Developers and Transmitters – **October 2010**





Communications

- **MeF 1040 web pages on irs.gov**
 - Located on the 'Coming Soon to the MeF Program' page at <http://www.irs.gov/efile/article/0,,id=204750,00.html>
 - Contains links for:
 - Forms
 - Publications
 - Software Developers, States, and Practitioners
 - Benefits of MeF
 - Calendar of Events
- **Mailbox for MeF 1040**
 - Email Address: 1040mef@irs.gov
 - Questions on schemas or other technical issues concerning the program
 - Key questions/answers will be posted to irs.gov as frequently asked questions (FAQs)
- **MeF Status Page**
 - After implementation, refer to the status page for important updates at <http://www.irs.gov/efile/article/0,,id=168537,00.html>





Partnering Efforts

- **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 meetings (semi-annual. Target September 2010)
 - 1040 Working Group conference calls (monthly)
 - Schema walk-through conference calls (start date and frequency TBD)
- **Software Developers Conference – June 28 and 29, 2010**



Questions

