



Tax
FORUM
IRS Nationwide
2009

The E's Have It

Tax Professionals & the IRS

- Tax professionals filing methods:
 - 51% stated they e-file all or most of their client returns
 - 49% stated they file all or most of their client returns on paper
 - Of these, 97% use software to prepare returns
- Tax professionals contact the IRS:
 - 54% called the IRS's toll-free line
 - 59% called the Practitioner Priority Service line
 - 85% visited the IRS Web site



IRS.gov Statistics

(as of April 15, 2009)

	2009 (Jan 1–Apr 15)	2008 (Jan 1–Apr 15)	% Change
Page Views	1,048.6M	1,014.2M	3.4%
Visits	183.3M	156.8M	16.9%

	2009 (Jan-Mar*)	2008 (Jan-Mar*)	% Change
Downloads	82.1M	78.0M	5.3%

IRS.gov Improvements

- This past year the IRS.gov team has made many improvements
 - Updated search feature
 - Updated search results page
 - Larger search box
 - Rotating spot light in the center of the home page
 - Improved frequently asked questions layout
 - New pick lists
 - New screen resolution (1024 x 768)
 - Page Last reviewed or updated
 - Home Page Improvements



e-services

- Registration
- Preparer Tax Identification Number Application
- Taxpayer Identification Number Matching
- Disclosure Authorization
- Electronic Account Resolution
- Transcript Delivery System



IRS e-Notice Concept

- Enrollment Application
- Notice File Translation
- Secure Mailbox
- Delivery Notification
- Retrieval Method
- Notice Archive



QuickAlerts – New Platform

- QuickAlerts email provides e-file information when it's needed
- New delivery server provides new features and allows easy subscription & profile changes
- Learn more about this Free Service at www.irs.gov and search "QuickAlerts"



Advancing e-file Study

- A Congressional directed study that will review the opportunities that will increase individual e-filing.
- The study will include:
 - Taxpayer Behavior – motivation and concerns
 - Direct Filing
 - 2-D Barcode
 - Preparer Mandates
 - State and other Country Experiences
- The study will assist the IRS in achieving the goal of 80 percent of tax returns being filed electronically.



Modernizing 1040 *e-file*

- Faster Acknowledgements: allows preparers to fix return issues in “real-time.”
- Specific Error Explanations: simple wording identifies the specific problem that caused the rejection.
- Improved Processing:
 - Year-Round Filing
 - Prior Year Returns
 - PDF Attachments
- Coming in January 2010



Deployment Schedule

- Phase I – January 2010
 - Form 1040 and 22 other forms/schedules (23 forms - TY 2009):

Sch A	Sch E	Sch SE	2441	8812	8888
Sch B	Sch EIC	1099-R	4562	8829	W-2
Sch C	Sch M (new)	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 127 additional forms/schedules
 - Current TY 2011 (~150 forms)
 - Prior TY 2010 (23 forms) and Prior TY 2009 (23 forms)

Processing Year 2009 e-file Statistics as of June 19

Form	2009	2008
1120	206,726	175,126
1120S	964,616	682,665
1120F	370	17
7004	1,517,667	1,102,556
1065/1065-B	724,979	515,643
990/990EZ/N/PF/ 1120POL	143,786	148,347
8868	61,956	37,329
2290	8,949	3,519
720/8849	474	7

E-File Growth Continues



2009 are projected volumes

Marketing *e-file* to Tax Professionals

- Leveraged existing IRS relationships
 - AARP
 - Federation of Tax Administrators
 - National Association of Tax Professionals (NATP)
 - National Small Business Forum
 - Society of Human Resource Managers
- IRS Electronic Resource Guide
- Promoted electronic filing through websites, online newsletters and publications
- Articles in *SSA/IRS Reporter*, quarterly
- *Tax Talk Today* Broadcasts, bi-monthly



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