

# E-Standards Update

FTA Technology Conference 2016

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# Significant Role in Summit Efforts

- 2016 Filing Season - State Authentication Header
  - Based on Security Summit Authentication Team
  - Due to IRS delay, proceeded with state design
  - Built separate Authentication Header
  - Moved elements from Return Header as needed
  - Built logical groupings of elements
- This year IRS will use a separate Authentication Header!

# Significant Role in Summit Efforts

- 2017 Filing Season
  - Authentication Header for Individual
    - Updates to be discussed in the E-Standards meeting on Wednesday afternoon
    - Expansion of technical data gathered
    - Support for Trusted Customer
  - Authentication Header Business
    - Corporate/Partnership (StateBusinessPackage)
    - EstateTrust
    - Simpler data collected for first year

# Exploring New Initiative for MeF

- Use of XSD 1.1
  - Method of documenting/incorporating business rules in the schema
    - Makes business logic explicit for partners
  - Schemas are compatible as long as new features not used
  - XML documents are completely compatible
  - Introducing topic at E-Standards meeting this week
  - Iowa will pilot for 2017 filing season

# Sales and Use and Excise Taxes

- Sales and Use – ready for use!
  - Migrated to forms-based schemas
  - Growing adoption
- Motor Fuel – one Change Request pending
- Tobacco
  - Cigarette schema will be presented at Tobacco Uniformity meeting this week
  - Other Tobacco Products first draft

# Payroll Taxes – Where the Action Is

- Employer Annual Filings
  - W2/W2C filing
    - Based on standard EFW2 structure
    - XML for modern filing
    - Ability for states to add their own forms
  - Selected 1099 filing
    - 1099s from FIRE efile
    - XML schemas from MeF efile
  - All changes from May meeting incorporated
  - Ready to approve for production use

# Payroll Taxes – Where the Action Is

- E-Levy
  - Based on work of state/industry team
  - First draft schema set reviewed in May
  - All May changes now incorporated
  - Includes both schema for Wage levies and schema for Financial Levies
  - Ready for next review on Thursday
  - Goal is to support the complete Levy life cycle including adjustments and satisfactions

# Payroll Taxes – Where the Action Is

- E-POA – Power of attorney for Payroll Service Providers for Employers
  - Requested by Payroll Industry
  - First draft reviewed at May Meeting
  - All changes now incorporated
  - Second review on Thursday
- FSET
  - Significant deployment base
  - One Change Request approved in May
  - One new Change Request pending

# Questions????

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