

E-Standards Update

FTA Technology Conference 2018

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Significant Role in Summit Efforts

- No new elements in AuthenticationHeader, but some new definitions and values
 - Worked with NIST team to develop 3-year roadmap based on NIST 800-63(B)
 - This year, one unrestricted factor
 - AuthenticationReviewCd “5” to indicate new enhanced authentication method
 - Updated code for browser-based DeviceId to be released later this month
 - Again refined FinancialProduct definitions

Significant Role in Summit Efforts

- 2018 Filing Season Leads Reporting
 - BMF Leads for upcoming season
 - Removed elements that did not apply to BMF
 - Added one or two especially for BMF
 - Identified Patterns relevant to BMF
 - Repackaged LeadsReporting schema set
 - Single Common
 - IMFLeadsReport
 - BMFLeadsReport
 - Couple of elements required for upcoming year

Taxes Paid to Other States

- 2017 Filing Season Successful Pilot
 - States found data very useful
 - No state attempted to automate processing
- 2018 Extended Pilot
 - New states and industry partners
 - Original states will try to automate
 - Very few tweaks to schema – keep minimal to evaluate 90% of credits
 - Available for review in StateIndividualPackage
 - Contact Arizona if interested in participating

Exempt Organization (IRS 990) Efile

- EO can be efiled through MeF
- IRS 990 schema in IRS efile package
- There is no StateExemptOrg schema package
 - Do we need one?
 - Are states including EO in their Business packages?
- Advantage of splitting out
 - Ability to manage the downloading of lower priority returns
 - Ability to do linked returns

Excise Taxes

- Refinement to Cigarette and Tobacco Schemas
 - Working with FTA Tobacco Uniformity
 - Additional States in discussion
 - Revised Schema Sets Published
- Updates to Motor Fuel Package
 - Better support Canadian and Mexican partners
 - Additional options
- And remember that Sales Tax schema set is available for use!

Payroll Taxes – Where the Action Is

- Employer Annual Filings – with great participation from NACTP Payroll Committee
 - W2/W2C filing
 - Based on standard EFW2 structure
 - XML with E-Standards transmission structures
 - Ability for states to add their own forms
 - Selected 1098/1099/W2G filing
 - Forms from FIRE efile
 - XML schemas from MeF efile where available
 - Combined W2/1099 filing
 - All changes from May meeting incorporated
 - Adding Authentication elements this meeting

Payroll Taxes – Where the Action Is

- E-Levy
 - Originated with work of state/industry team
 - Revived by Wisconsin partnering with ADP
 - Goal is to support the complete Levy life cycle including adjustments and satisfactions
 - Levy payments can use the ACH Third Party Payment (TPP) Addenda
 - Looking for ways to simplify multi-point filing
 - Learn more at presentation Wednesday morning!

Payroll Taxes – Where the Action Is

- E-POA – Power of attorney for Payroll Service Providers for Employers
 - Requested by Payroll Industry
 - All changes from May now incorporated
 - Potential to improve control of which PSP is representing which Employer for any payroll tax period
 - Will compare to FSET Enrollment schema for potential duplication of functionality

Schemas Posted for Your Review

- MeF schema packages in State Exchange System
 - StateIndividualPackage
 - StateBusinessPackage
 - StateEstateTrustPackage
 - LeadsReporting
- New Employer and Payroll Reporting SES Folder
 - Currently only EmployerAnnualReporting schema
- Motor Fuel, Cigarette, Tobacco, Sales, FSET and Levy packages posted on www.statemef.com
- All schemas subject to tweaks at this meeting!

And now, a word from your sponsor...

- Details of all these updates and new work will be covered in the E-Standards meeting
- Wednesday afternoon MeF and Leads
 - Last opportunity to tweak for 2019 efile season
 - Vote to approve all draft schemas
- Thursday all day Payroll and Employment
 - Approve updates to EmployerAnnualFiling
 - Approve first Levy schemas for pilot use
- Opportunity to propose new projects and to join current projects!

Questions????

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