

IRS Tax Products CD Case Study

Using new technology

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The opinions expressed during this presentation are those of the presenter, and do not necessarily represent the official opinion of the Internal Revenue Service or the Department of the Treasury.



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Overview

- **IRS Organization**
- **The Old Way**
 - Tax Year 2003 and earlier
- **The New Way**
 - To Infinity and beyond
- **Additional Benefits**
- **Demonstration**



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IRS Mission Statement

Provide America's taxpayers top quality service by helping them understand and meet their tax responsibilities and by applying the tax law with integrity and fairness to all.



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IRS Organization

Four primary Operating Divisions

- **Wage and Investment**
 - **Media and Publications**
- **Small Business and Self-Employed**
- **Large and Mid-Size Business**
- **Tax Exempt and Government Entities**



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IRS Tax CD

- Created more than 12 years ago
- Pre-Internet
 - Bulletin Boards (BBS's)
 - FTP sites
- Audience
 - Tax Practitioners, Libraries, Educational Institutions, Lawyers, IRS Walk-in Offices
- Everything in one place



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.....
TAX
.....
PRODUCTS
.....
CD-ROM
.....

Final Release

Current and Prior
Years' Federal Tax
Forms, Instructions,
and Publications.

Final Release



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Department of the Treasury
Internal Revenue Service

Publication 1796, Federal Tax Products CD-ROM

2002




















The Old Way

- Arduous task of updating content
- Multiple 70+ page documents
 - Data managed in Word/Excel documents, not database
- Early cutoff dates
 - Mid November
 - Mid January
- Required Licensed Software on CD
 - Minimum order for price discount



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File Structure of Previous CDs

 2D_Pilot	File Folder	3/8/2004 1:26 PM
 Adobe	File Folder	3/8/2004 1:26 PM
 Irs_Help	File Folder	3/8/2004 1:26 PM
 Misc_PDF	File Folder	3/8/2004 1:25 PM
 Tax_PDF	File Folder	3/8/2004 1:23 PM
 03ReadMe.txt	4 KB Text Document	3/2/2004 2:16 AM
 autorun.inf	1 KB Setup Information	3/1/2004 11:53 AM
 Config.txt	2 KB Text Document	3/2/2004 2:16 AM
 GoTo 03ReadMe.html	1 KB Shortcut	3/2/2004 2:16 AM
 GoTo 03ReadMe.pdf	1 KB Shortcut	3/2/2004 2:16 AM
 GoTo MacOSX_Readme.rtf	1 KB Shortcut	3/2/2004 2:16 AM
 GoTo Rel_Note.pdf	1 KB Shortcut	3/2/2004 2:16 AM
 IRS.ico	4 KB Icon	3/2/2004 2:16 AM
 Menu.jpg	36 KB JPEG Image	3/2/2004 2:16 AM
 PDFFile.ico	24 KB Icon	3/2/2004 2:16 AM
 setup.exe	1,151 KB Application	3/12/2004 11:59 AM
 testsetup.jpg	14 KB JPEG Image	3/2/2004 5:53 PM
 welcome.html	3 KB HTML Document	3/12/2004 1:33 PM
 Welcome.pdf	98 KB PDF File	3/2/2004 2:16 AM



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Tax_PDF Directory

 2000		File Folder	3/8/2004 1:25 PM
 2001		File Folder	3/8/2004 1:25 PM
 2002		File Folder	3/8/2004 1:25 PM
 2003		File Folder	3/8/2004 1:24 PM
 Cont		File Folder	3/8/2004 1:23 PM
 SpanProd		File Folder	3/8/2004 1:23 PM
 2000LIST.html	202 KB	HTML Document	3/2/2004 2:15 AM
 2000LIST.pdf	506 KB	PDF File	3/2/2004 2:15 AM
 2001LIST.html	218 KB	HTML Document	3/2/2004 2:15 AM
 2001LIST.pdf	549 KB	PDF File	3/2/2004 2:15 AM
 2002LIST.html	228 KB	HTML Document	3/2/2004 2:15 AM
 2002LIST.pdf	1,287 KB	PDF File	3/2/2004 2:15 AM
 2003LIST.html	275 KB	HTML Document	3/2/2004 2:15 AM
 2003LIST.pdf	614 KB	PDF File	3/2/2004 2:15 AM
 Curr.jpg	45 KB	JPEG Image	3/2/2004 2:15 AM
 Espanol.html	23 KB	HTML Document	3/2/2004 2:15 AM
 Espanol.jpg	37 KB	JPEG Image	3/2/2004 2:15 AM
 Info.jpg	23 KB	JPEG Image	3/2/2004 2:15 AM
 MLI Intro.pdf	122 KB	PDF File	3/2/2004 2:15 AM
 pdf_f.jpg	13 KB	JPEG Image	3/2/2004 2:15 AM
 Prio.html	2 KB	HTML Document	3/2/2004 2:15 AM
 Prio.jpg	44 KB	JPEG Image	3/2/2004 2:15 AM
 Prio.pdf	22 KB	PDF File	3/2/2004 2:15 AM
 SpanProd.pdf	80 KB	PDF File	3/2/2004 2:16 AM
 SPCurr.html	8 KB	HTML Document	3/2/2004 2:16 AM
 SPCurr.pdf	83 KB	PDF File	3/2/2004 2:16 AM
 SPEfile.pdf	109 KB	PDF File	3/2/2004 2:16 AM
 SPEITC.pdf	75 KB	PDF File	3/2/2004 2:16 AM
 SPPrio.html	22 KB	HTML Document	3/2/2004 2:16 AM
 SPPrio.pdf	141 KB	PDF File	3/2/2004 2:16 AM



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Welcome.pdf 2003

TAX 2003 Federal Tax Products CD-ROM

PRODUCTS CD-ROM

This CD-ROM contains IRS Federal Tax Products released as of February 25, 2004. For technical assistance with the use of this CD, call (703) 487-4608 or e-mail helpdesk@Fedworld.gov. To provide suggestions for improving this CD, e-mail wi.taxproductscd@irs.gov

- **Current Tax Year Products**
Current revisions of forms, instructions and publications
- **Prior Tax Years' Products**
Forms, instructions and publications for filing 2000 through 2002 taxes
- **Related Tax Products**
Internal Revenue Bulletins, Audit Technique Guides, Market Segment Understandings
- **IRS e-file Information**
Forms, marketing materials, and technical manuals for IRS *e-file*
- **EITC Information**
Forms, publications, and Tax Professional's Kit for Federal Earned Income Tax Credit
- **Schedule K-1 Pilot Project**
IRS tests the use of 2D Barcode technology in new Schedule K-1
- **World Wide Web Links**
Links to tax-related internet sites
- **CD-ROM Help**
Technical support numbers and information
- **CD-ROM On-Line Info**
Special on-line notices of interest for Tax Products CD-ROM users
- **Accessibility**
Information about accessibility features of this CD-ROM
- **Multi-Language Initiative**
Information regarding federal tax products in other languages



Tax CD - 2003List.pdf

CURRENT YEAR TAX PRODUCTS

Tax Products for Tax Year 2003

Revision	Product	Fillable	Title
2003	Form CT-1	PDF/Fillable	Employer's Annual Railroad Retirement Tax Return
2003	Instr CT-1		Instructions for Form for Form CT-1
01-2003	Form CT-2	PDF/Fillable	Employee Representative's Quarterly Railroad Tax Return
01-2004	Form CT-2	PDF/Fillable	Employee Representative's Quarterly Railroad Tax Return
01-2003	FinCEN Form 101	PDF/Fillable	Suspicious Activity Report by the Securities and Futures Industry
01-2003	FinCEN Instr 101A		Instructions for FinCEN Form 101
04-2003	FinCEN Form 102	PDF/Fillable	Suspicious Activity Report by Casinos and Card Clubs
04-2003	FinCEN Instr 102A		Instructions for FinCEN Form 102
03-2003	FinCEN Form 103	PDF/Fillable	Currency Transaction Report by Casinos
12-2003	FinCEN Form 103N	PDF/Fillable	Currency Transaction Report by Casinos - Nevada
12-2003	FinCEN Form 104	PDF/Fillable	Currency Transaction Report
07-2003	FinCEN Form 105	PDF/Fillable	Report of International Transportation of Currency or Monetary Instruments
12-2001	FinCEN Form 8300	PDF/Fillable	Report of Cash Payments Over \$10,000 Received in a Trade or Business
12-2001	Form SS-4	PDF/Fillable	Application for Employer Identification Number
09-2003	Instr SS-4		Instructions for Form SS-4
12-2001	Form SS-4 (PR)	PDF/Fillable	Solicitud de Numero de Identificación Patronal (EIN)

IRS TAX PRODUCTS

Current and Prior Year Federal Tax Forms
Instructions and Publications as of November 27, 2004

2004
FIRST RELEASE



Department of the Treasury
Internal Revenue Service
Pub. 1796 (Rev. 12-2004)
Catalog Number 20497L

www.irs.gov



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New Technology

- Looking for a better, faster, easier way
- Minimize pre-production time
- Alter cutoff day to increase value
- Better workflow
- Enhanced productivity
- Ability to meet scheduled delivery dates
- Added benefits



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Overall Production Process

- Start with Mainframe database
- Manipulate data extract in spreadsheet
- Import data into Filemaker Pro
 - Works best with PDF Folio
- Output data-stream to PDF file
 - More than 1150 records
 - Resulting PDF file is less than 400K
- Ability to meet scheduled delivery dates

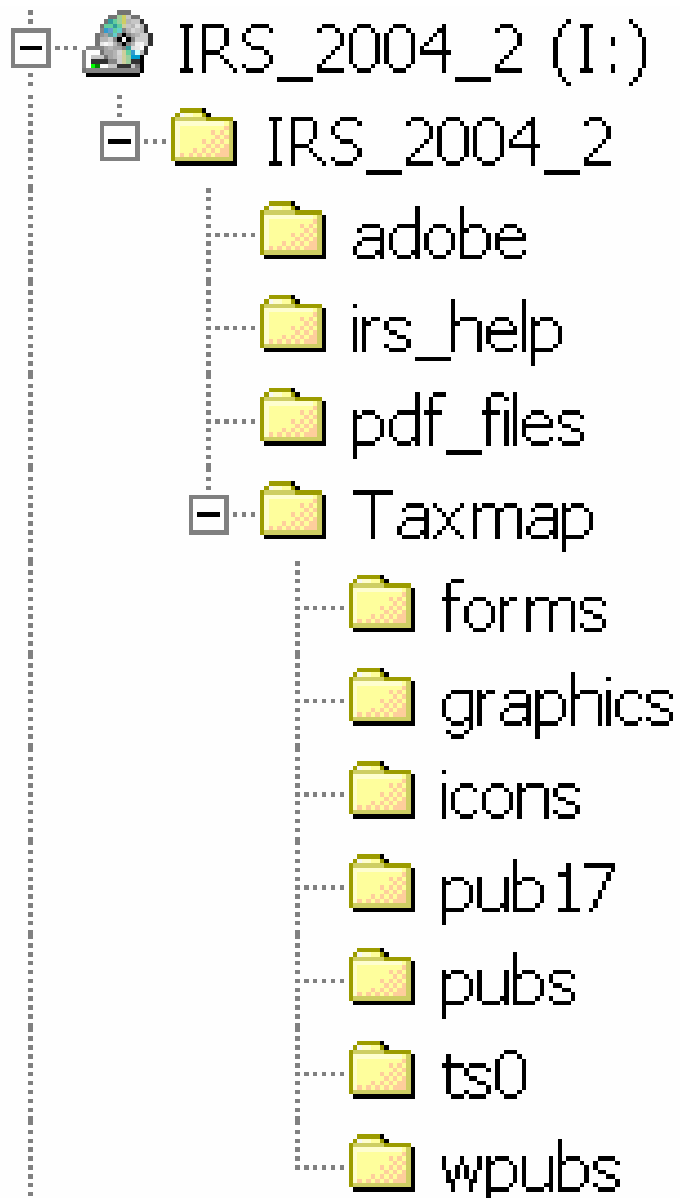
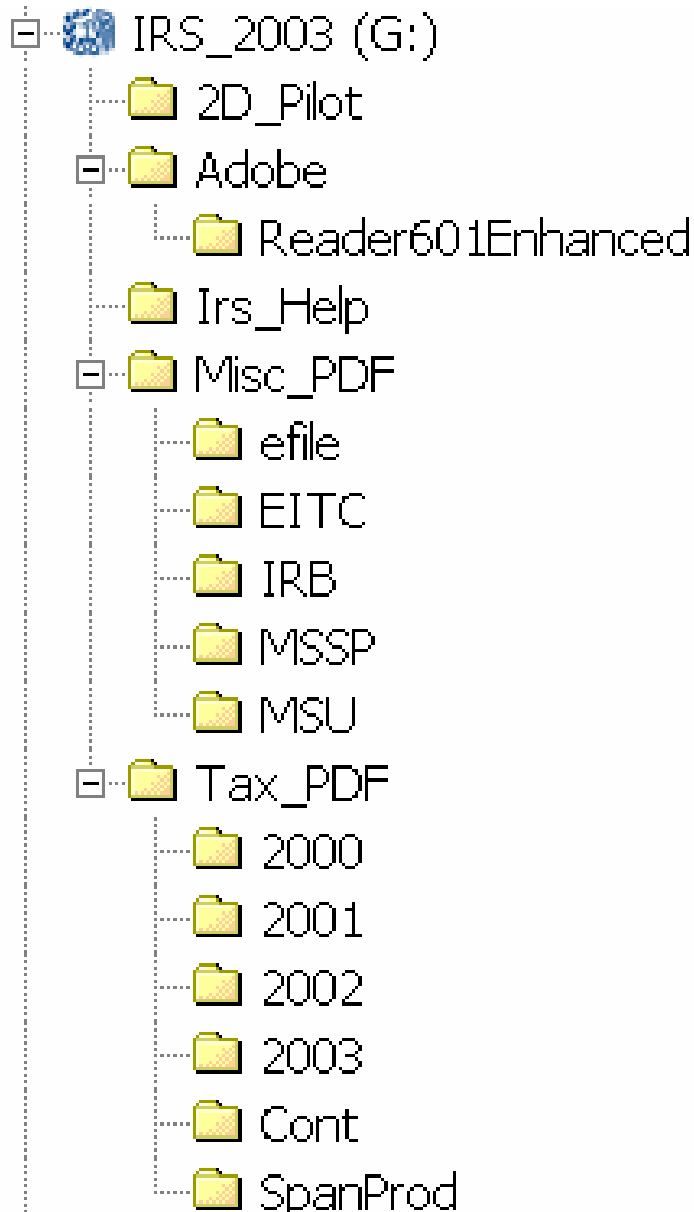


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File Structure of Current CD

Address		IRS_2004_2	
Name ▲	Size	Type	Modified
 adobe		File Folder	12/16/2004 1:49 PM
 irs_help		File Folder	2/14/2005 7:10 AM
 pdf_files		File Folder	2/14/2005 7:16 AM
 Taxmap		File Folder	2/10/2005 8:30 AM
 allprods.pdf	59 KB	PDF File	2/13/2005 9:27 AM
 allprods.txt	73 KB	Text Document	2/13/2005 9:27 AM
 Config.txt	3 KB	Text Document	2/12/2005 10:00 AM
 Credits.pdf	12 KB	PDF File	2/14/2005 8:53 AM
 Gen_Info.txt	4 KB	Text Document	2/12/2005 10:31 AM
 IRS.ico	4 KB	Icon	3/1/2004 6:16 AM
 Network Setup Help.txt	2 KB	Text Document	2/12/2005 10:32 AM
 ReleaseNotes.rtf	6 KB	Rich Text Format	2/1/2005 12:30 AM
 tpnavlogobdr.jpg	26 KB	JPEG Image	11/2/2004 6:44 AM
 Welcome.pdf	30 KB	PDF File	2/12/2005 8:25 AM

Directory Structure Comparison



Key Files on the CD

- **Welcome.pdf**
- **Taxprod.pdf**
- **Taxprod_network.pdf**
 - Used for network installation
- **TmHome.htm**
 - Tax Map Application



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Welcome.pdf

TAX PRODUCTS CD-ROM

This CD-ROM contains IRS Federal Tax Products released as of **February 13, 2005**. For technical assistance with the use of this CD, call (703) 487-4608 or e-mail helpdesk@Fedworld.gov. To provide suggestions for improving this CD, e-mail wi.taxproductscd@irs.gov.



Department of the Treasury
Internal Revenue Service
Publication 1796 (Rev. 2-2005)
Catalog Number 20497L
Final Release

2004 Tax Products CD *Final Release*

- **All Tax Products**
Current and prior revisions of tax forms, instructions and publications
- **Printable Tax Products List**
(24 page printable list of all tax products available on this CD)
- **Internal Revenue Bulletins**
2004 and 2005 weekly IRBs
- **IRS *e-file* Information**
Forms, marketing materials, and technical manuals for IRS *e-file*
- **EITC Information**
Products used in the Earned Income Tax Credit program
- **IRS Tax Map Research Tool**
IRS Tax Map is a new electronic research tool developed for and used by IRS telephone assistants
- **CD-ROM Help**
Technical support numbers and information
- **Accessibility**
Information about accessibility
- **World Wide Web Links**
Links to tax-related internet sites
- **Multi-Language Initiative**
Information regarding federal tax products in other languages
- **CD-ROM Updates Page**

Taxprod.pdf

Reveal Entire List

Tax Products List

Main Menu

Search Help

Product	Title
Form CT-1	Employer's Annual Railroad Retirement Tax Return
Instr. CT-1	Instructions for Form CT-1
Form CT-2	Employee Representative's Quarterly Railroad Tax Return
FINCEN FORM 101	Suspicious Activity Report - Securities and Futures Industry Instructions
FINCEN FORM 101A	Instructions for FINCEN Form 101
FINCEN FORM 102	Suspicious Activity Report - Casinos and Card Clubs
FINCEN FORM 102A	Instructions FinCEN Form 102
FINCEN FORM 103	Currency Transaction Report by Casino
FINCEN FORM 103-N	Currency Transaction Report by Casinos - Nevada
FINCEN FORM 104	Currency Transaction Report
FINCEN FORM 105	Report of International Transportation of Currency or Monetary
FINCEN FORM 107	Registration of Money Services Business, FinCEN Form 107
FINCEN FORM 8300	Report of Cash Payments Over \$10,000 Received in a Trade or Business
Form SS-4	Application for Employer I.D. Number
Instr. SS-4	Instructions for Form SS-4
Form SS-4 (PR)	Application for Employer I.D. Number (Spanish)
Instr. SS-4 (PR)	Instrucciones para la Forma SS-4PR
Form SS-5	Application for a Social Security Number Card (Original, Replacement or Correction)
Form SS-5 (SP)	Application for a Social Security Card (Spanish Version)
Form SS-8	Determination of Worker Status for Purposes of Federal Employment Taxes and Income Tax W

PRODUCT SEARCH

TITLE SEARCH

SEARCH ALL

Navigation Help



IRS Tax Map Application

TAX PRODUCTS CD
IRS TAX MAP 2004

Search All Topics:
 GO

[Search Help](#)
[Navigation Help](#)

Main Topics

A B C D E F G H I
J K L M N O P Q R
S T U V W X Y Z #

[Forms](#)
[Publications](#)

[Comments](#)
[About Tax Map](#)

IRS TAX MAP
Tax Products CD ROM

Integrated Indexes
Tax Related Publications
FAQs
IRS TAX Forms

IRS
Department of the Treasury
Internal Revenue Service
www.irs.gov

IRS TAX MAP 2004
TAX PRODUCTS CD ROM



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New Interface

Tax Products List

Main
Menu

Product

Title

Form CT-1	Employer's Annual Railroad Retirement Tax Return
Instr. CT-1	Instructions for Form CT-1
Form CT-2	Employee Representative's Quarterly Railroad Tax Return
FINCEN FORM 101	Suspicious Activity Report - Securities and Futures Industry Instruct
FINCEN FORM 101A	Instructions for FINCEN Form 101
FINCEN FORM 102	Suspicious Activity Report - Casinos and Card Clubs
FINCEN FORM 102A	Instructions FinCEN Form 102
FINCEN FORM 103	Currency Transaction Report by Casino
FINCEN FORM 103-N	Currency Transaction Report by Casinos - Nevada
FINCEN FORM 104	Currency Transaction Report
FINCEN FORM 105	Report of International Transportation of Currency or Monetary
FINCEN FORM 107	Registration of Money Services Business, FinCEN Form 107
FINCEN FORM 8300	Report of Cash Payments Over \$10,000 Received in a Trade or Bus
Form SS-4	Application for Employer I.D. Number
Instr. SS-4	Instructions for Form SS-4
Form SS-4 (PR)	Application for Employer I.D. Number (Spanish)
Instr. SS-4 (PR)	Instrucciones para la Forma SS-4PR
Form SS-5	Application for a Social Security Number Card (Original, Replacement or Corri
Form SS-5 (SP)	Application for a Social Security Card (Spanish Version)
Form SS-8	Determination of Worker Status for Purposes of Federal Employment Taxes ;
Form SS-8 (PR)	Determination of Employee Work Status for Purposes of Federal Emplo

PRODUCT
SEARCH

TITLE
SEARCH

SEARCH
ALL

NAVIGATION
HELP

Review Selected Item(s)

Clear Selection

My Wish List

- **Expanded Interface Options**
- **Automatic Updates**
- **DVD Delivery**
 - **Historical Tax DVD**
- **Expanded offerings to our customers**



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Demonstration

- Existing Interface
- New Interface
- Your comments are welcome



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"Even if you are on the right track, if you aren't moving forward fast enough, you will be run over."

Paul Showalter



**Internal
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Thank you

For more information on the IRS,
and our products and services,
please visit our web site,

www.irs.gov



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