



Conference Agenda

2026 FTA Technology Conference

August 2–5, 2026 · St. Louis Union Station, St. Louis, MO

For reference only — agenda as of July 30, 2026. The schedule is subject to change; the current agenda is always available on the event website: <https://hub.taxadmin.org/e/tech-conference-2026#agenda>

SUNDAY, AUGUST 2, 2026

3 PM – 7 PM

3 PM – 7 PM

Conference Registration

Registration will be available during the below times:

- Sunday from 3 to 7 p.m.
- Monday and Tuesday opening at 7:30 a.m.

Midway West · 240 min

6 PM – 8 PM

6 PM – 8 PM

Welcome Networking Reception in the Grand Hall

While we wait for the FTA Tech Express to pull into the station, enjoy our welcome reception in the main Grand Hall of St. Louis Union Station. Get to know your fellow attendees at the welcome networking reception. Refreshments and light bites will be served.

Grand Hall · 120 min

MONDAY, AUGUST 3, 2026

7:30 AM – 9 AM

MIDWAY EAST

Breakfast featuring a fireside chat with Former IRS Commissioner Danny Werfel

Breakfast will be served starting at 7:30, with the fireside chat beginning at 8:00. FTA COO Ryan Minnick sits down with former IRS Commissioner Danny Werfel to discuss his recent academic work, including his perspectives on AI frameworks and how he sees technology reshaping tax administration in the years ahead. The conversation picks up where their *FTA Tax Breaks LIVE* podcast discussion left off, recorded at the 2025 FTA Compliance Workshop.

Ryan Minnick, Danny Werfel

7:30 AM – 9 AM · 90 min

REGENCY A

Technology and Operations Leader Breakfast

This government-only breakfast is for Technology and Operations Leaders (title equivalents of Commissioner, COO, CIO, CISO, or platform/ITS director). If you are unsure if you should attend, email ryan.minnick@taxadmin.org

7:30 AM – 9 AM · 90 min

9 AM – 12 PM

9 AM – 9:10 AM **Welcome to FTA Tech 2026**

Ryan Minnick

Grand DEF · 10 min

9:10 AM – 10 AM **Time Shift: The 1926 World Series, Technology Changes, and Future Lessons**

Terry Lemons, long-time IRS communications director, explores the classic 1926 World Series between his hometown Cardinals and the New York Yankees — and the championship's continuing effect on the city and baseball. A century ago, technology changes touched everything from communications to transportation, creating a ripple in time that continue to be felt across society. Now, more changes loom that will alter the nation's landscape. This session - taking place in historic Union Station where scenes from the 1926 World Series played out - will build off Terry's unique background as an IRS executive, newspaper reporter and baseball fan. He'll discuss the past, present and future through the lens of 1926 as he looks at implications for the tax community and government leaders.

Terry Lemons

Grand DEF · 50 min

10 AM – 10:20 AM **Coffee Break**

Network with your fellow attendees at our morning coffee break.

Grand DEF · 20 min

10:20 AM – 10:30 AM **Welcome to Missouri**

Missouri Governor Kehoe will provide welcoming remarks to conference attendees, highlighting the state's commitment to advancing tax administration technology and fostering collaboration among state and local tax agencies.

Hon. Mike Kehoe

Grand DEF · 10 min

10:30 AM – 11:30 AM **The Dark Side of Innovation: How Criminals are Leveraging Advanced Technology**

This session examines how criminals are exploiting artificial intelligence, vast data repositories, and sophisticated technological tools to target tax systems and government agencies. Speakers will analyze emerging criminal methodologies and discuss how tax administrators can collaborate with each other and private sector partners to develop countermeasures that stay ahead of evolving threats in the digital landscape.

Shawn Ivy, David Maimon, Ryan Minnick

Grand DEF · 60 min

11:30 AM – 12 PM **Why and How Did FTA Build a Member Chatbot?**

Scott Graham, Ryan Minnick, Abhishek Misra

Grand DEF · 30 min

12 PM – 1:30 PM

12 PM – 1:30 PM **Lunch on Own**

Offsite · 90 min

GRAND A

How data analysts solve Big Data questions in Taxation - Part 1: Technical Application of Concepts

Data

This session is a discussion of the application and review of examples of technology agnostic applications of analytics concepts including population analysis, predictive models, fuzzy matching for similarity, automated feedback loops and more. We will discuss how to integrate third party analytics tools with tax administration systems, how to keep proper logs for auditing, and how to measure and discuss risk.

Rahul Sarathy

1:30 PM – 2:30 PM · 60 min

GRAND B

Mind the Gaps: What Nevada Learned Between Go-Live and Adoption

In 2024, the Nevada Department of Taxation launched MYNT, a system transformation that reshaped daily work for both employees and taxpayers — and did not unfold in a straight line. This session offers an honest, behind-the-scenes look at how the agency brought its people along. Using a real-world change management framework, we'll walk through how leadership built awareness and made the case for change, established clear product ownership and accountability, activated a network of Change Ambassadors to surface frontline feedback, and put sustainment practices in place so the change held long after go-live. Expect candor about what went wrong, what it cost, and how readiness deliverables and continuous improvement have steadily lifted MYNT's adoption — including the agency's maturity progression from ad hoc fixes to a structured, sustainable cadence.

Attendees leave with a reusable framework for leading large-scale, imperfect system change, and a clear-eyed view of what it actually takes to bring people with you.

GRAND C

Taxing Crypto: A Hands-On Case Investigation Workshop

Crypto

Crypto represents a rapidly growing—and largely untapped—state tax base. As activity expands across decentralized and cross-jurisdictional environments, state tax authorities face a fundamental challenge: How do states act on federal leads, independently identify high-risk activity among state residents, and determine how crypto-related income should be attributed and apportioned across jurisdictions?

If your agency is looking to better understand, identify, or work crypto tax cases, this hands-on workshop is designed for you.

Participants will learn:

- How income is generated across the crypto ecosystem (trading, staking, DeFi, gaming)
- Where state-level tax exposure exists—and how it's often missed
- The methods used to attribute fragmented on-chain activity to real-world taxpayers
- How crypto-related income can be sourced and apportioned across jurisdictions
- How to prioritize and work crypto cases, whether sourced

REGENCY B

The Nation State Fraud Playbook

Nation state financial fraud is not a variant of traditional fraud. It is a different category of threat, built on different motivations, different resources, and a resilience that arrests and takedowns cannot touch, and state tax agencies sit squarely in its path. This talk examines four state actors, North Korea, Russia, China, and Iran, and the distinct playbooks each runs against financial and government systems: crypto heists and IT worker infiltration from the DPRK (including operatives who have applied for jobs, and in some cases government contracts, under false identities), a state-crime nexus that makes Russian organized crime functionally indistinguishable from Russian intelligence, financial espionage and insider recruitment from China, and four decades of sanctions evasion architecture from Iran. This talk lays out what state agencies need to know: where current verification and detection processes fall short, and what a more resilient posture looks like for tax administration in an era when sophisticated state actors target government systems as routinely as they target banks.

David Maimon

<i>Keri Kosach</i> 1:30 PM – 2:30 PM · 60 min	internally or through IRS leads • How to subpoena crypto exchanges for additional attribution and transaction information in order to expand cases Participants will engage with real-world scenarios throughout the session: • Analyze crypto cases to uncover multiple income streams within a single taxpayer profile • Evaluate unreported trading activity and estimate taxable gains • Consider how income may be attributed and apportioned across states based on observed activity • Work through how to build and support an audit-ready case • Explore commonly used approaches and tools for organizing and interpreting complex transaction data Whether your goal is to identify new cases or more effectively work those already identified, this workshop provides a practical framework to translate crypto activity into clear, defensible state tax enforcement <i>Noam Chamovitz</i> 1:30 PM – 2:30 PM · 60 min	1:30 PM – 2:30 PM · 60 min
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2:30 PM – 2:45 PM

2:30 PM – 2:45 PM *Networking Break*

Network with your fellow attendees at our afternoon breaks.

Midway West · 15 min

2:45 PM – 3:45 PM

GRAND A

How to Make Every Employee Part of Your Data Strategy

Data strategy succeeds or fails based on whether frontline employees understand their role in collecting, maintaining, and using data — not just the analysts and IT staff. This session examines how tax agencies can embed data awareness into everyday workflows, job responsibilities, and organizational culture without requiring technical expertise from every employee.

Jason Woodcock will walk through practical approaches for communicating data standards, establishing clear ownership at the operational level, and building internal accountability structures that keep data quality consistent across departments. Attendees will leave with a framework for identifying where data responsibilities are unclear in their own agencies and how to close those gaps.

Jason Woodcock

2:45 PM – 3:45 PM · 60 min

GRAND B

How Coding Agents Can Give Your Developers Superpowers

AI

This session explores how AI-powered coding agents can accelerate software development within tax administration systems. Participants will examine real-world implementations of coding assistants that automate routine programming tasks, generate code snippets, and identify potential bugs before deployment.

Andrew Gieseke

2:45 PM – 3:45 PM · 60 min

GRAND C

Modernizing Crypto Tax Compliance in the 1099-DA Era: From Data to Actionable Insights

Crypto

The new Form 1099-DA is here - and it's an avalanche of data that's different from other 1099 series forms. This session examines what that data looks like, how states can access it through existing information-sharing agreements, and what limitations exist in the current reporting framework.

Panelists will also address the broader data landscape beyond 1099-DA, including blockchain analytics tools, third-party data sources, and emerging compliance strategies states are using to identify unreported crypto income and close the tax gap.

Roger Brown, Akshay Malhotra

2:45 PM – 3:45 PM · 60 min

REGENCY B

Sponsor Series - FAST: The New Agency Playbook: Thriving in a Resource Constrained World

Agencies everywhere are feeling the squeeze. Staffing gaps, rising workloads, and tighter budgets are reshaping what “business as usual” looks like. But within these constraints lies a powerful opportunity: the chance to reimagine how work gets done.

Join us for a 50-minute session featuring real-world insights from revenue agencies across the country.

Hear how your peers are:

- Managing increased workloads with existing staff and systems
- Streamlining processes to improve efficiency and consistency
- Delivering better, more responsive customer experiences"

Mathew Kantor

2:45 PM – 3:45 PM · 60 min

3:45 PM – 4 PM

3:45 PM – 4 PM *Networking Break*

Network with your fellow attendees at our afternoon breaks.

Midway West · 15 min

GRAND A	GRAND B	GRAND C	REGENCY B
The Evolution of Tax Modernization: Operationalizing Customer Experience CX Tax agencies have successfully modernized their systems but not necessarily the taxpayer's experience of those systems. The next phase of modernization is operationalizing customer experience, not replacing more technology. Drawing on trust research from Pew, OECD, and procedural-justice scholarship, this presentation shows that fair, clear processes drive public trust and compliance, sometimes more than outcomes do, and that experience failures carry real costs, from repeat-contact volume to reputational collapse. Case studies from the IRS and industries such as healthcare, air travel and online commerce demonstrate how well-intentioned metrics and automation can quietly degrade - or deliberately manipulate - customer experience. The session closes with a practical four-layer CX governance model, aligned to the CXPA framework, plus a self-assessment attendees can use to begin to score their own agency's CX maturity. <i>Frank Nestore</i> 4 PM – 5 PM · 60 min	How Society is Using AI against Governments As AI tools become freely available and infinitely scalable, individuals and businesses are increasingly using them to navigate complex tax codes, automate protest filings, and identify appeal opportunities at a volume that legacy agency systems were never designed to handle. This session examines how AI-driven filing and protest activity is outpacing the staffing and automated defenses that state and local tax agencies currently have in place. Participants will explore specific tactics being used against tax agencies — from mass-generated appeals to AI-assisted exploitation of statutory ambiguities — and discuss what administrators can do to detect and respond to this growing challenge. <i>Josh Sandler</i> 4 PM – 5 PM · 60 min	What if you had to build a Tax Agency from Scratch? Bougainville, a newly autonomous region in the South Pacific, faces a rare and complex challenge: building a tax agency from the ground up, with no legacy systems, inherited processes, or technical debt to contend with. This session examines what that blank-slate opportunity actually looks like in practice — the decisions, constraints, and tradeoffs involved in designing a modern tax administration using current technology. The session will explore how foundational choices around systems architecture, compliance strategy, and organizational structure differ when there is no existing infrastructure to work around or accommodate. State and local tax administrators may find unexpected parallels to their own modernization efforts, particularly when evaluating what they would do differently if starting fresh. <i>Nathan Benson</i> 4 PM – 5 PM · 60 min	Now You See It, Now You Don't: Revealing the Taxpayers Behind Anonymous Transactions Ownership is easy to record — the true owner, not always. Across jurisdictions, a surprising share of filings involve parties that can't be identified, leaving capital gains, income tax, and controlling interest obligations hidden in plain sight. Whether the asset is real property, a business interest, or a financial instrument, the playbook for obscuring ownership follows familiar patterns: layered entities, nominee holders, and jurisdictional gaps that exploit the seams between reporting regimes. In this session, IVIX follows the trail — unpacking how ownership gets obscured across asset classes and business structures, where enforcement breaks down, and how tax authorities can connect the dots. Through real-world examples, we show how to surface the true owners behind an entity or holding, link them to their obligations, and turn missing data into actionable cases. <i>Deborah Pianko</i> 4 PM – 5 PM · 60 min

5 PM – 8 PM

5 PM – 8 PM

Networking Reception in the Exhibit Hall

Join us for the grand opening of the 2025 FTA Technology Conference Exhibit Hall! Refreshments and light bites are served, and you'll be able to see the latest in tax technology and services from our exhibitors.

Midway West · 180 min

TUESDAY, AUGUST 4, 2026

7:30 AM – 9 AM

MIDWAY WEST

Breakfast in the Exhibit Hall

Start your day off with a hot breakfast buffet in our exhibit hall.

7:30 AM – 9 AM · 90 min

REGENCY A

Technology and Operations Leader Breakfast

This government-only breakfast is for Technology and Operations Leaders (title equivalents of Commissioner, COO, CIO, CISO, or platform/ITS director). If you are unsure if you should attend, email ryan.minnick@taxadmin.org

7:30 AM – 9 AM · 90 min

9 AM – 10 AM

9 AM – 10 AM

How Executives Are Learning to Lead with GenAI: The Four Stages of GenAI Maturity

Generative AI is moving quickly, but most organizations are still learning how to understand its practical value, manage its risks, and guide its use responsibly. This session will offer a practical maturity map for leaders, tracing how GenAI use can evolve from individual assistance, to task execution, to workflow support, to more advanced agentic systems. Along the way, we will explore what each stage means for leadership, training, governance, and organizational value. Attendees will leave with a clearer way to assess where their teams are today, where GenAI may create meaningful opportunities, and what questions leaders should be asking as the technology continues to develop.

Alex Denniston

Grand DEF · 60 min

10 AM – 10:30 AM

10 AM – 10:30 AM *Coffee Break*

Network with your fellow attendees at our morning coffee break.

Midway West · 30 min

10:30 AM – 11:30 AM**GRAND A****Tax Breaks LIVE: You have the Data, what's the Question?**

State and local tax agencies aren't short on data anymore — the challenge is knowing what to ask it. In this live-recorded FTA Tax Breaks Podcast session, Wisconsin DOR Secretary David Casey, São Paulo tax innovation lead Rodrigo Kreis de Paula, and Rhode Island's Rahul Sarathy bring three very different vantage points — enterprise strategy, applied AI on the ground, and the exam floor — to one question: what actually separates a dashboard from a decision? Expect a real case walked live, hard talk on getting the question wrong at scale, and a lightning round of advice for agencies just getting started.

David Casey, Rodrigo Kreis De Paula, Ryan Minnick, Rahul Sarathy

10:30 AM – 11:30 AM · 60 min

GRAND B**Let's speak plainly, 2.0 - Nevada's next-generation Plain Language Workflow**

Nevada's Department of Taxation will walk through the evolution of its plain language initiative, detailing how the agency moved from ad hoc rewrites to a structured, repeatable workflow for transforming tax notices, forms, and guidance documents into clear, accessible communication. The session covers the tools, review processes, and internal governance structures that make the workflow scalable across document types and agency units.

Presenters will share specific before-and-after examples, discuss how readability metrics and taxpayer feedback are used to measure outcomes, and address the practical challenges of building staff buy-in across departments with different writing cultures.

Participants will leave with a replicable framework they can adapt for their own agency's plain language efforts.

Scott Freidus, Patric Starr

10:30 AM – 11:30 AM · 60 min

GRAND C**Success from Day 0: How Procurement Contracts Build The Foundation for Engagement**

This session examines how tax agencies can use the procurement and contracting process as a strategic tool for vendor engagement, setting the stage for successful technology implementations before a project officially begins. Topics will cover how contract language, performance standards, and vendor accountability mechanisms established at the outset can prevent common implementation pitfalls.

Participants will explore practical approaches to structuring solicitations and contract terms that align vendor incentives with agency outcomes, including how to define deliverables, milestones, and remedies in ways that hold up throughout a project's lifecycle.

Brian Oliner

10:30 AM – 11:30 AM · 60 min

REGENCY B**Strategic AI for Tax Administration
It's Time to Streamline Your Agency**

Tax agencies today are being asked to do more with less - chase down debtors, deal with an overwhelming volume of risk, and make difficult calls on how to close the tax gap. That's why RSI built PremierIQ, an AI platform designed specifically for tax agencies to increase efficiency, maximize revenue, and reduce costs. Join us to see how PremierIQ moves agencies from reactive to proactive compliance as we walk through the platform's modular capabilities, share what's possible today, and discuss what it could mean for the future of your tax administration.

David Smith, Evan Wilson

10:30 AM – 11:30 AM · 60 min

11:30 AM – 12 PM

11:30 AM – 12 PM *Networking Break in the Exhibit Hall*

Network with your fellow attendees in our exhibit hall.

Midway West · 30 min

12 PM – 1:30 PM

12 PM – 1:30 PM *Lunch in the Exhibit Hall*

Enjoy lunch in our exhibit hall with your fellow attendees and visit our exhibitors afterwards. This is your last chance to see the exhibits!

Midway West · 90 min

FOR REFERENCE ONLY

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1:30 PM – 2:30 PM

GRAND A

Technology Leaders Panel: Charting the Future of Tax Administration

Join a panel of technology leaders from across state and local tax agencies as they share insights on navigating today's challenges and tomorrow's opportunities. From modernizing legacy systems to harnessing AI and data analytics, panelists will discuss the innovations driving change—and the leadership required to make it happen. Bring your questions and hear how these leaders are prioritizing investments, building resilient teams, and shaping the future of digital government.

Michael Foster, Beth Hertweck, Ryan Minnick, Ananias Williams III

1:30 PM – 2:30 PM · 60 min

GRAND B

Strategy works best when everyone is part of the discussion

Two former state tax agency leaders draw on their experience managing large-scale projects to examine why strategy fails when key stakeholders are left out of the conversation. As agencies accelerate technology adoption, projects frequently shift in size and scope—making inclusive planning and clear direction more critical than ever.

This session presents a practical methodology for building team alignment from the start, along with best practices for keeping strategy on track as project conditions evolve.

Peter Barca, Mark Godfrey

1:30 PM – 2:30 PM · 60 min

GRAND C

Streamlining Filing with Pennsylvania's Fast File Program

[Efiling](#)

Meggan Swisher

1:30 PM – 2:30 PM · 60 min

REGENCY B

The Clock Is Ticking: How Government Agencies Can Navigate the FIRE Shutdown and Modernize 1099 Reporting

The IRS is retiring its FIRE (Filing Information Returns Electronically) system on December 31, 2026, and replacing it with IRIS. For state and local government agencies, this is more than a technical update. It's a hard deadline that demands new credentials, new data formats, and new workflows, all while budgets stay flat and staff capacity stays limited. At the same time, recent legislative changes—including new reporting thresholds, W9 form changes, and IRIS's stricter real-time validation—are adding layers of complexity government agencies never had to manage before.

In this session, Gordon Walsh, 1099/W-9 Product Solution Consultant at Avalara (The "1099" Guy), will walk through exactly what's changing, what it means for government payers, and how agencies are updating their systems to meet these urgent obligations (without building from scratch).

Audience takeaways:

- What the FIRE-to-IRIS transition requires and why legacy workflows will no longer work

			- How new thresholds and form changes affect government payers - Why now is the right moment for agencies to evaluate their compliance infrastructure <i>Gordon Walsh</i> 1:30 PM – 2:30 PM · 60 min
2:30 PM – 2:45 PM			
2:30 PM – 2:45 PM <i>Networking Break</i> Network with your fellow attendees. Midway West · 15 min			
2:45 PM – 3:45 PM			
GRAND A	GRAND B	GRAND C	REGENCY B
Perspectives from the State CIO's View: NASCIO Partner Association <i>Doug Robinson</i> 2:45 PM – 3:45 PM · 60 min	2026 FTA Award Winner: Wisconsin's Advanced Dashboards and Data Analysis <i>Cole Zarifis</i> 2:45 PM – 3:45 PM · 60 min	Defending TurboTax Against Evolving Threats Every tax season, bad actors adapt faster than static rules can keep up, shifting tactics week over week to slip past defenses. This session goes inside how we fight back, pairing human investigators with AI-based tools to move at the speed of the threat and turn one-off catches into durable defenses. We'll share what worked, what didn't, and the key learnings from a season spent chasing threats that refuse to sit still. <i>Garth Miner</i> 2:45 PM – 3:45 PM · 60 min	Putting AI to Work in Tax Administration AI is everywhere in the tax-technology conversation, this session shows what it actually looks like in practice. We will show how to catch a anomalous and fraudulent returns with machine-learning and AI that explains <i>why</i> it flagged it, then use Amazon Quick to analyze tax data through plain natural-language questions. We will also cover how AI is simplifying the infrastructure management for tax systems. Throughout, we'll tackle the question every tax technologist is asking: how to do this safely with Tax payer data and where AI should and shouldn't touch sensitive data, and why a human stays in the loop. <i>Sohaib Tahir</i> 2:45 PM – 3:45 PM · 60 min

3:45 PM – 4 PM

3:45 PM – 4 PM *Networking Break*

Network with your fellow attendees and grab a snack.

Midway West · 15 min

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4 PM – 5 PM

GRAND A

What makes an ITS Award-Winning? (It's more than software)

Kentucky's Department of Revenue recently launched DORIS, a new integrated tax system that has earned multiple awards for its taxpayer-friendly interface and expanded self-service options. The secret to its success goes beyond the software — it required sustained agency-wide buy-in, deliberate change management, and coordination across departments.

This session offers a behind-the-scenes look at how the Kentucky team built momentum, overcame internal resistance, and delivered a system that works for both staff and taxpayers. Attendees will hear directly about the decisions, trade-offs, and organizational strategies that turned a major technology overhaul into an award-winning implementation.

Beth Hertweck

4 PM – 5 PM · 60 min

GRAND B

Improving Agency Notice Resolution – An Initiative Involving The Wisconsin and Illinois Departments of Revenue and Payroll Providers, ADP and Gusto.

In 2023 providers and the Wisconsin Department of Revenue started a project to improve the compliance and resolution of agency notices. Agencies issue notices for multiple reasons including failure to file a return, additional tax due, question about a filing, question about a payment and change in filing frequency. Taxpayers using a provider send notices received from agencies to their provider for resolution. This session will show how a process was developed and implemented in the Wisconsin Department of Revenue and the Illinois Department of Revenue. The session will also provide data on the improvement in notice resolution, reduction in second notices and improvement in taxpayer service level from providers and agencies that has been achieved to date. The session will show the progress made on the effort from the introduction of this topic at FTA Tech in Milwaukee.

The presenters will be representatives from the Wisconsin Department of

GRAND C

IRS Safeguards: Partnership beyond reviews help keep taxpayer data secure

This session examines the pending update to IRS Publication 1075, highlighting key changes that state and local tax agencies should prepare for. Beyond the formal review process, the IRS Safeguards team maintains ongoing collaboration with agencies that is equally critical to protecting taxpayer data — particularly as technology and cybersecurity threats continue to evolve.

The session emphasizes that the partnership itself comes first: proactive, continuous engagement with the Safeguards team strengthens data security in ways that periodic reviews alone cannot achieve.

John Sims

4 PM – 5 PM · 60 min

REGENCY B

The Tax Intelligence Stack: Where Technology, Tax Expertise, and Human Expert Judgment Converge

Larry Mellon, Chris Hall, Tina Hartman, Gina Chen

4 PM – 5 PM · 60 min

Revenue, Susan Dukes, and representatives from providers including ADP, Charles Collins and Gusto, Shelly Abril. <i>Charles Collins, Susan Dukes, Lauren Escalante</i> 4 PM – 5 PM · 60 min	
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5 PM – 6 PM

5 PM – 6 PM

Networking Reception in the Exhibit Hall (New For 2026!)

Following the second full day of sessions, attendees are invited to unwind and connect with fellow tax administrators over drinks in the Exhibit Hall. This is the final opportunity to visit exhibitor booths and speak directly with vendors about their products and services before the hall closes for the conference.

Midway West · 60 min

WEDNESDAY, AUGUST 5, 2026

7:30 AM – 9 AM

7:30 AM – 9 AM

Breakfast

Start your day off with a hot breakfast buffet

Midway West · 90 min

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9 AM – 11 AM

GRAND A

MEF Vendor Support Enhancement

Efiling

This session examines how the Georgia Department of Revenue identified critical gaps in its Modernized e-File (MEF) vendor support model and developed targeted solutions to address them. Presenters will walk through the specific challenges uncovered, the process used to redesign support workflows, and the measurable outcomes achieved so far.

A central element of this initiative is the use of **Generative AI** to accelerate problem resolution, improve the quality of vendor interactions, and reduce response times across the support lifecycle. Attendees will come away with a concrete understanding of how AI tooling was applied in a real-world tax administration context and what results it produced.

Jon'Qua Bazemore, Dewayne Davis, Jamarr Glover

9 AM – 10 AM · 60 min

Platform & ITS Director Panel: Building on Your ITS Foundation

An integrated tax system is the foundation of an agency's operations, but what agencies build on top of that foundation determines the quality of both staff outcomes and the taxpayer experience. Two technology leaders share how their agencies have leveraged their ITS platforms to drive improvements beyond core tax administration functions.

Greer Allison, Beth Hertweck

10 AM – 11 AM · 60 min

GRAND B

Workshop: How GenAI can help speed up claims judgement

The OPTIMUS platform was built in-house by the City of São Paulo to help adjudicators manage the large volume of tax appeals and claims filed each year. The system uses generative AI to support two core functions: classifying incoming claims and surfacing relevant information to assist judges in reaching decisions — significantly accelerating the adjudication process.

This session walks through how OPTIMUS was designed and implemented, then shifts to a practical discussion of what it would take to build a similar capability within a U.S. state or local tax agency, including the technical, legal, and operational considerations involved.

Rodrigo Kreis De Paula

9 AM – 10 AM · 60 min

How data analysts solve Big Data questions in Taxation - Part 2: Integrating analytics with business processes

Data

Building upon the technical application of analytical concepts, this session will examine three use cases of applying analytics into existing business processes, with a focus on planning, stakeholder management, communication, education, and governance. Our use cases will cover implementing the first-of-its-kind Non-Owner Occupied Property tax in RI using private and public data, creating near-real time feedback loops for analysis and handling of retroactive tax changes as a result of H.R.1 for tax years 2022-2024, and the implementation of an automated process for receiving, analyzing and reporting on Taxpayer First Act (and other FTI) data files.

GRAND C

Technology Trends Shaping the Future: Insights from the Latest ETAAC Report

What technologies are reshaping the tax landscape—and how should agencies prepare? This session highlights key findings from the latest Electronic Tax Administration Advisory Committee (ETAAC) report, focusing on emerging trends, challenges, and opportunities in tax technology. Explore recommendations on cybersecurity, digital identity, data sharing, and innovation, and hear how these insights can inform your agency's strategic planning and modernization efforts.

David Casey, Doug Harding

9 AM – 10 AM · 60 min

Beyond Motor Fuel: Using DMV Data to Detect Refund Fraud

Missouri will share how it's using motor vehicle data as a cross-referencing tool to identify fraudulent motor fuel refund claims — and why this data-matching approach has applications well beyond motor fuel. Presenters will cover the legislative changes that enabled this work, how DMV records are used to flag suspicious claims, and how other tax types and programs could adapt the same model to strengthen fraud detection.

Zach Wyatt

10 AM – 11 AM · 60 min

Rahul Sarathy

10 AM – 11 AM · 60 min

For reference only · agenda as of July 30, 2026 · current agenda: <https://hub.taxadmin.org/e/tech-conference-2026#agenda>

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