

MSATA 2008 Preliminary Agenda (R. 7/21/08)

Sunday, August 17, 2008 - Activities	
7:00 a.m.	Golf Departure <i>(Transportation provided to University Ridge Golf Club)</i>
7:30 a.m.	Golf Registration at University Ridge Golf Club <i>(Continental breakfast provided)</i>
8:30 a.m.	Golf Outing Begins <i>(shotgun start, lunch and prizes provided)</i>
1:00 – 8:30 p.m.	Conference Registration
3:00 – 5:30 p.m.	Exhibitor Reception <i>(Wine/Cheese in Exhibitor Area at The Madison Concourse Hotel, University Room)</i>
6:00 – 8:30 p.m.	Opening Reception <i>(Overture Center for the Arts, cash bar and hors d'oeuvres with musical entertainment)</i>
Monday, August 18, 2008 – General Session	
7:00 a.m. – 5:00 p.m.	Conference Registration
7:00 – 8:30 a.m.	Breakfast
8:30 – 8:45 a.m.	Opening Ceremonies, with Welcome/Introductions <i>Secretary Roger Ervin, Wisconsin Department of Revenue</i>
8:45 – 10:00 a.m.	Issues with State Business Taxes <i>William Fox, Professor, Department of Economics, The University of Tennessee</i>
10:00 – 10:30 a.m.	BREAK
10:30 – 12:00 noon	Economic Trends for Tax Administrators <i>Clare Zempel, Economist, Zempel Strategies</i>
12:00 – 1:30 p.m.	LUNCH – Amy Lynch, Author and Entrepreneur, Generation Y Expert
1:30 – 2:30 p.m.	How Can Revenue Departments Be More Efficient and Effective -- Best Practices from a Business Perspective <i>Diane Hardt, Wisconsin Department of Revenue, Moderator</i> <ul style="list-style-type: none"> • <i>Doug Lindholm, Executive Director, COST</i> • <i>Frank Yanover, Senior Tax Counsel, GE</i> • <i>Rebecca Paulsen, Manager, State Tax Planning, US Bank</i>
2:30 – 2:45 p.m.	BREAK

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2:45 – 3:45 p.m.	Working Together for State Tax Administration <ul style="list-style-type: none"> • <i>Harley Duncan – KPMG</i> • <i>Joe Huddleston, Executive Director, MTC</i> • <i>Scott Peterson, Executive Director, SST</i>
3:45 – 4:45 p.m.	Commissioners' Roundtable
6:00 – 8:30 p.m.	Reception <i>At the Governor's Residence located along Lake Mendota. An old-fashioned Wisconsin cook-out with entertainment provided by the University of Wisconsin Marching Band.</i>

Tuesday, August 19 – Concurrent Sessions

7:00 – 8:30 a.m.	Breakfast
8:00 – 10:30 a.m.	Commissioners Only Breakfast Meeting

Time	Audit <i>(Lead States: North Dakota & Wisconsin)</i>	Time	Electronic Solutions <i>(Lead States: North Dakota & South Dakota)</i>	Time	Property Tax <i>(Lead States: Iowa, Nebraska & Oklahoma)</i>
8:30 – 10:00 a.m.	Streamlined – CSP Audits & What Streamlined Means to Me <i>Joan Wagnon, KS Toni Webster, OK Bob Muller, IN Charles Collins, ADP Taxware</i>	8:30 – 10:00 a.m.	Integrated Systems – How to get There Including Scanning, Imaging, Fax Integration and Viewing Systems <i>Nathan Bergman, ND Laurie Riva, IL Bryce Berg, IA</i>	8:30-10:00 a.m.	Equalization Issues <i>Dale Hyman, IA Scott Shields, WI</i>
10:00 – 10:15 a.m.	Break	10:00 – 10:15 a.m.	Break	TBD	Break
10:15 – 11:30 a.m.	Managers' Roundtable <i>(All States – Rick DeBano, WI will lead) Bryce Berg, IA Dan Hall, IL Mandi Shawarira, IN Kristina Martin, MI Sue Chad, MN Darrell Engen, ND Mike Boekhaus, KS Ron Pottorf, OH Deb Gusak, NE Monty Bivens, OK Bruce Christensen, SD Scott Leary, MO</i>	10:15 – 11:30 a.m.	Security & Confidentiality – The Future is Now <i>Lili Crane, WI Dave Delaney, MN FTA, Invited Not Confirmed</i>	TBD	Property Tax Burdens and Property Tax Relief Programs in the USA <i>David Baer, AARP IPAS (WI) Managers' Roundtable Kara Moretto, IL ??, IN ??, MO ??, IA ??, WI ??, NE ??, SD ??, KS ??, ND ??, MI ??, MN</i>

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Lunch - On Your Own					
Time	Audit Cont'd <i>(Lead States: Ohio & Minnesota)</i>	Time	Electronic Solutions Cont'd <i>(Lead States: Indiana, & Michigan)</i>	Time	Collections/Compliance <i>(Lead States: Jeff Scott - Kansas & Kristin Hilliker-Hartung - Wisconsin)</i>
12:00 – 1:30 p.m.					
1:30 – 3:00 p.m.	Voluntary Disclosure and Other Compliance Initiatives <i>Dan Hall, IL Julie Christensen, WI Mike Boekhaus, KS Fred Nicely, COST</i>	1:30 – 3:00 p.m.	Electronic Filing – Mandates and Non-Mandates <i>Vicki Siekert, WI Cindy Lillge, WI Cathy Henninger, IN Leann Boswell, IA Annette Wolfe, MI</i>	1:30 – 3:00 p.m.	Managers' Roundtable <i>Henry Butler, IL Not Participating, IN Wayne Cooper, IA Debra Gusak, NE Jeff Scott, KS Kristina Martin, MI Terri Steenblock, MN Scott Leary, MO Rick Anthony, OH Monty Bivens, OK Dave Nincehelter, SD Patrick Boechler, ND Catherine Bink, WI</i>
3:00 – 3:15 p.m.	Break	3:00 – 3:15 p.m.	Break	3:00 – 3:15 p.m.	Break
3:15 – 5:00 p.m.	Electronic Audits – From Selection to Assignment to Audit <i>Sue Chad, MN Megan Porter, ND Ron Pottorf, OH TBD, GE</i>	3:15 – 5:00 p.m.	Data Mining and Data Matching <i>Kristina Martin, MI Laurie Riva, IL Andrew Kapp & Aron Montaini, KS</i>	3:15 – 5:00 p.m.	Auto Levies / Auto Certs / Financial Institution Data Matching <i>Ray Gabriel, IN Steve Gorton, WI Susan Dukes, WI Terri Steenblock, MN Lisa Bina, WI-BCS Diane Hogan, Tier Danielle Pittman, Tier</i>

Tuesday, August 19, 2008 – One Hit Wonders

Time	<i>Lead States: Missouri & Illinois</i>
8:30 – 8:45 a.m.	Internet Posting – Public Posting of Tax Delinquencies <i>Henry Butler, IL; Jim Brentlinger, MO</i>
8:45 – 9:15 a.m.	Outreach to Non-English Speaking Customers & Guest Workers <i>Ruth Karlsson, Nebraska; Mimi Gonzales, IRS; Bob Arango, IRS, Moderator</i>
9:15 – 9:45 a.m.	Customer Service – Consistency, Training, Recording Systems, Screen Pops, Case Management, Hold Time, E-Mail Management, Quality Assurance <i>Bill Bahler, IN; Robin Harris, KS</i>
9:45 – 10:00 a.m.	Automated CP2000 Solutions <i>Janna Baganz, WI</i>

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10:00 – 10:15 a.m.	Break
10:15 – 10:30 a.m.	Automated CP2000 Solutions <i>Invited, not confirmed</i>
10:30 – 11:00 a.m.	Performance Measures <i>Jan Talley, SD; Terri Steenblock, MN</i>
11:00 – 11:30 a.m.	Use Tax Audits / Sources / Education <i>Doug Nelson, SD</i>
12:00 – 1:30 p.m.	Lunch – On Your Own
1:30 – 2:30 p.m.	Succession Planning – Apprentices & Mentoring Programs <i>Deepa Buss, NE; Lisa Kaspar, KS; Cathy Novak-Wood, KS & Kathy Metcalf, KS</i>
2:30 – 3:00 p.m.	Profiling Candidates for Employment <i>Bill Bahler, IN; Kathy Metcalf, KS; Robin Harris, KS</i>
3:00 – 3:15 p.m.	Break
3:15 – 3:45 p.m.	Telecommute & Partnering Municipalities (2 – 3 Sessions for Different States) <i>Vicki Gibbons, WI; Joyce Bartel, KS and Mary Ardrey, KS</i>
3:45 – 4:00 p.m.	Joint Work with IRS – Collections <i>Kristin Hilliker-Hartung, WI; Teresa Kiser, IRS; Bob Arango, IRS, Moderator</i>
4:00 – 4:15 p.m.	Joint Work with IRS – Audit <i>Rick DeBano, WI; Ron Rossi, IRS; Bob Arango, IRS, Moderator</i>
4:15 – 4:30 p.m.	State Revenue File Match Initiative (SRFMI) <i>Annette Jones, IRS; Bob Arango, IRS, Moderator</i>
4:30 – 4:45 p.m.	Pre-Refund Auditing – EIC <i>Kevin Brandt, WI</i>
4:45 – 5:00 p.m.	Discovering Fraud – W2s <i>Kristina Martin, MI</i>
6:00 – 7:00 p.m.	Cocktail Reception (<i>The Madison Concourse Hotel</i>)
7:00 – 10:00 p.m.	Closing Banquet (<i>The Madison Concourse Hotel</i>)