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# Wisconsin's Path to Integrated Tax Administration

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# Cow path vs. Interstate



- 1996 – Action plan
- 1998 – Vendor selection and master plan
- 1999 – Sales and use tax requirements for **custom build**
- 2000 – **Vendor change**
- 2002 – Sales and use tax **transfer system** implemented
- 2003 – Individual income requirements defined
- 2004 – **Vendor change**
- 2005 – **COTS product**



# Current vendor - implemented



- January 2006 – Corporation income/franchise
- March 2006 – Premier resort area tax
- June 2006 – Local exposition center tax, state rental vehicle tax, regional transportation authority fee, check images from depository bank
- November 2006 – Individual & fiduciary income tax
- December 2007 – Sales & use, business tax registration, occasional consumer use tax
- January 2008 – Image management
- August 2008 – Withholding tax, pass-through withholding tax, partnership returns, composite returns



# Current vendor – still to come

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- February 2009 – Taxpayer Access Point for business taxes
- November 2009 – Beverage & tobacco taxes, dry cleaning fee, audit & collection standalones
- July 2010 – Estate tax, 4 collection-only accounts
- January 2011 – Taxpayer Access Point for individuals
- August 2011 – Fuel taxes



# COTS Product



- Configuration and reference tables rather than development
- Site-specific modules for interfaces
- Site-specific modules for things specific to state which aren't supported by the base product
- The less site-specific code, the less Fast support needed after implementation
- Fits with statewide IT direction to COTS products



# Project Lessons Learned

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- Data conversion is a lot of work, so convert as little as you can to still meet business needs
- Start data cleanup as soon as you start even thinking about new software
- Rapid development & implementation puts pressure on organization to staff project and manage change

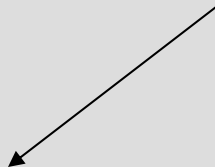


# Project Lessons Learned

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- Develop a process for making and documenting key decisions to prevent going in circles
- Don't be afraid to change direction - don't hesitate too long
- Design a cool logo



# Project Challenges

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- Learning curve on part of staff
  - Depends on how much of a change from their legacy system
  - Assume that you may not see productivity improvements immediately
  - Desk-side support is crucial
  - Tips, tricks on intranet, computer-based training, just-in-time training sessions, GenTax Help



# Project Challenges

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- The longer the timeline, the more things can change
  - Changes in executive sponsorship
  - Key staff changes at both agency and vendor
  - Changing requirements because of law changes, policy changes, etc.
  - Changes in management of vendor



# Business Benefits

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- Visibility of all activities on account supports customer service
- Uniformity of framework for all tax programs means employees are more versatile, more easily trained
- Consistency of practices throughout the organization benefits customers and agency



# Business Challenges

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- Business functional groups need to coordinate more, agree on standards, common practices
- Rapid development schedule means quick results, but doesn't allow much time for process improvement if you haven't already thought about that

# WI Wins – Image Management



- Previously images stored in separate application, IBM Content Manager
- Staff time spent looking up return record and image in two different systems
- Now return images displayed within WINPAS, side-by-side with captured data
- Non-return documents stored as inbound correspondence or attachment
- Converting necessary old images from Content Manager to WINPAS



# WI Wins – Image Management



- Scanning old paper files that need to be retained
- Eliminating old heads-down data entry of paper returns in favor of scanning
- Increasing e-filing penetration
- Correspondence generated within WINPAS is visible within WINPAS
- Rapidly approaching the time when all documents related to a taxpayer are available within WINPAS
- Able to redirect staff that once managed all that paper



# WI Wins – Partnering with Data Warehouse

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Finding new ways every day to partner between the two systems:

- CP2000 audits
- Income tax nonfiler cases
- IRS farmer/fisher flags
- Electronic W-2 information for suspicious filers
- Automated wage attachment, bank account levy



# WI Wins –Modernized E-File



- An example of the kind of thing that Fast wants to support within their core product because many states will use
- Developed site-specific component for Wisconsin in 2006, then “productized”
- MeF communication gateway, acknowledgment process & return viewing all part of product
- WI has been receiving corporation returns since late 2006, partnership returns since early 2008 & will be ready for individual returns in mid 2009



# Questions?

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