

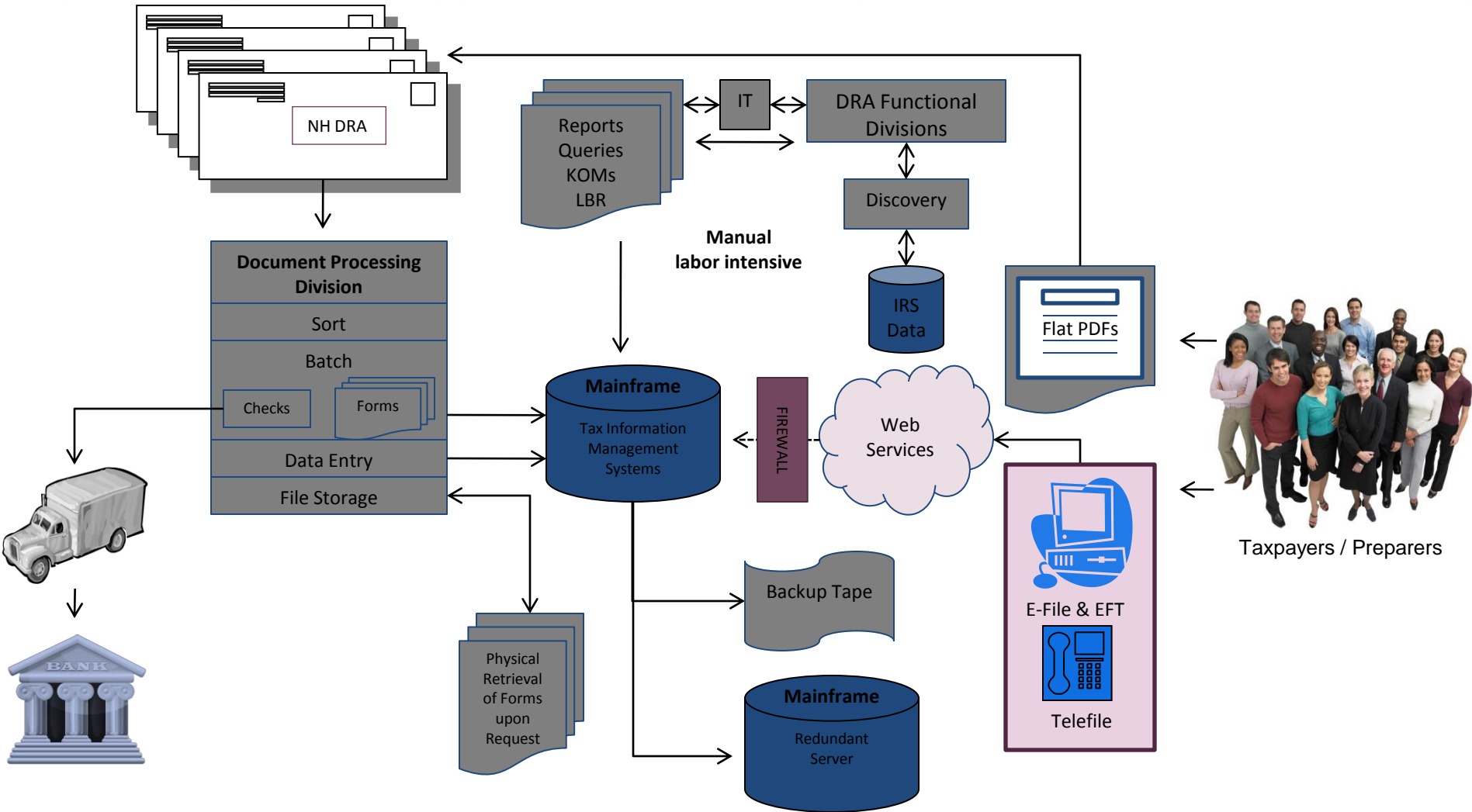


**New Hampshire
Department of Revenue Administration**

IT Lessons Learned

Brian J. Pace
Director Enterprise Architecture and PMO

Information Processing 2010



Modernization Program

- \$7M Capital Appropriation
- Branded “Granite to Green”
 - a portfolio of integrated projects designed to replace static systems and processes with those that are dynamic to maximize organizational efficiency and effectiveness.
- Time Frame: 2010 - 2012
- Inclusive of Hardware, Software, Professional Services and Training

OSS - 2010

- Tax Information Management System (TIMS)
 - Developed in 1989
 - COBOL
 - IBM AS-400, DB2
 - Green Screen User Interface
- Additional Tax Applications
 - VB.net
 - Access
 - Excel
 - Kofax Data Capture

Program Design

- Agency-wide Discovery
- Industry Enterprise Landscape
- Identify Initiatives
- Assumptions and Probability of Success
- Project Evaluation
- Initiative Scoring

Initiative Scoring

- Time: Discover/Procure/Implement/ROI
- Resource Constraints: Business/IT
- Organizational Impact: Positive/Negative
- IT Considerations: KB/Standards/Buy In
- Risk: Internal/External/Vendor
- PM Bandwidth

Granite to Green Initiatives

- Upgrade iSeries
- Upgrade Business Intelligence
- Create GIS System for Property Appraisal
- Automate Business Processes
- Select and Implement Document Processing and Electronic Remittance System
- Introduce Web-Based Research Tools
- Introduce Performance Management
- Increase Redundancy / Disaster Recovery Planning
- Upgrade Centrex Phone System
- Migrate FTI Data to DB2
- Enable forms for E-File / Participate in MeF Program
- Enable Credit Card / Debit Card Payment Option

Initiative Scoring: iSeries and BI

- **Time: Sixteen Months (March 2010 – June 2011)**
 - Discovery & Proof of Concept
 - RFB (Hardware, Software, Implementation services)
 - Implementation / Adoption / Deliverable
 - ROI (Agency-wide)
- **Resources**
 - Business: Leadership Driven, Full Buy In, Seasonal constraints
 - IT: Embedded in Decision Making Process, Full Buy In
- **Organization Impact: All Positive**
- **IT Considerations**
 - Embedded Knowledge Base
 - Dedicated Resources with Minimal External Resource Requirements
 - Excited Organization: New Toy / Full Buy In

Initiative Scoring: iSeries and BI

- Risk: Minimal
 - Familiar Language and Environment
 - Limited External IT Variables
 - Stable Company w/ Appropriate Recommendations
 - Strong Desire to Succeed (DRA and Vendor)
- PM Bandwidth Requirements
 - Vendor PM's Hardware/Software Install
 - Vendor creates Business Assessment
 - IT Manages Training Schedule
 - IT Manages SDLC
 - PM: Oversight, Status Updates, Positive Momentum, Trouble Resolution

First WebFocus Initiative - SVOT

Why Single View of the Taxpayer?

- Single View to Multiple Disparate Data Sources
- Efficient Means by which to Research
- Efficient Means by which to Coordinate Efforts
- Division Specific Dashboard Variations
- Enhanced Ability to Respond to Tax Payer Inquiry
- Deployed Across Entire Agency: June 2011

RIF – July 1, 2011

<u>Division / Function</u>	<u>FTE Percentage Change</u>
Administration	44%
Audit	39%
Central TP Services	100%
Collections	47%
Document Processing	53%
Municipal Services	44%
Property Appraisal	29%

Perception vs. Reality

- *“Just flip the switch and turn on the new equipment to continue business as usual.”*
 - \$7 million capital appropriation designed to replace processes; can not replace people
 - Insufficient staff to turn up new systems and run legacy systems for a period of time
- *“The DRA Budget Reduction will have no impact on revenue coming into the State.”*
 - State Budget passage did not consider impact of extensive loss of personnel, especially more than a dozen auditors

Granite to Green Progress

(July 1, 2011)

- Upgraded to iSeries Power 6 – **COMPLETE**
- Upgraded to IBI WebFocus and iWay – **COMPLETE**
- Created Mosaic: First Sustainable Statewide GIS System – **IN PROGRESS**
- Automate Business Processes – **IN PROGRESS**
- **RFP Published** for Document Processing and Electronic Remittance System
- Upgraded Mail Handling and Extraction via Agissar ASED – **COMPLETE**
- Introduced PFM via Agissar InfoPoll/InfoPointe System – **COMPLETE**
- Increase Redundancy / Disaster Recovery Planning – **IN PROGRESS**
- Replaced Centrex with Cisco VoIP and Call Center – **COMPLETE**
- Migrate FTI Data to DB2
- Enable forms for E-File / Participate in MeF Program
- Enable Credit Card / Debit Card Payment Option

WebFocus Dashboards

- Administration
- Audit
- Document Processing
- Collections
- Central Taxpayer Services
- Information Systems

Collections Dashboard

Accessibility Off | Tree | Recent | Favorites | Utilities | Help

Welcome to the Collections Dashboard!

■ NH Deeds ■ Real Data ■ Google ■ NH Corporate ■ Collections folder

Single View Taxpayer | Collections Web Links | Collections Document Links | Collections Folders | Phone and Maps | Collection Reports | M&R Reports | Director's Reports

SingleViewTaxpayer

Single View Taxpayer

1. Select Search Category **2. Select Search Type** **3. Enter Search Criteria** **4. Start Search**

All

Name, ID, Phone Number Address

Enter Name, ID or phone (no dashes)

WARNING

This system may contain U.S. Government information, which is restricted to authorized users ONLY. Unauthorized access, use, misuse, or modification of this computer system or of the data contained herein or in transit to/from this system constitutes a violation of Title 18, United States Code, Section 1030, and may subject the individual to Criminal and Civil penalties pursuant to Title 26, United States Code, Sections 7213, 7213A (the Taxpayer Browsing Protection Act), and 7431. This system and equipment are subject to monitoring to ensure proper performance of applicable security features or procedures. Such monitoring may result in the acquisition, recording and analysis of all data being communicated, transmitted, processed or stored in this system by a user. If monitoring reveals possible evidence of criminal activity, such evidence may

High Frequency Internet Links

Accessibility Off | Tree | Recent | Favorites | Utilities | Help

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COLL_Links Page_1304007854375

COLLECTIONS - INTERNET LINKS:

Assessing Companies
Avitar Associates <http://data.avitarassociates.com>
Patriot Properties <http://patriotproperties.com>
Vision Appraisal <http://visionappraisal.com/databases/nh/index.htm>

Bankruptcy
Bankruptcy Court <http://pacer.login.uscourts.gov>

DRA Websites
DRA home page <http://www.nh.gov/revenue>
DRA intranet <http://draintranet/admin/staff.htm>
DRA tax forms <http://www.nh.gov/revenue/forms/index.htm>
DRA laws & rules <http://www.nh.gov/revenue/laws/index.htm>
DRA e-file admin page <https://www.efilenhadmin.govconnect.com/adminlogin.asp>
NH e-file <https://www.efilenh.govconnect.com/web/introduction.asp>

Fed ex ship manager (for tobacco orders)
<https://www.fedex.com/>

Document Links

The screenshot shows a web application interface with a blue header bar containing navigation links: Accessibility Off | Tree | Recent | Favorites | Utilities | Help. Below the header is a yellow banner with the text "Welcome to the Collections Dashboard!". A blue navigation bar contains several menu items: NH Deeds, Real Data, Google, NH Corporate, and Collections folder. Below this is a light blue tabbed interface with tabs for Single View Taxpayer, Collections Web Links, Collections Document Links (which is active), Collections Folders, Phone and Maps, Collection Reports, and M&R Reports. The active tab shows a blue sub-header "COLL_Documents" with refresh and print icons. The main content area is white and contains the heading "COLLECTIONS DOCUMENTS:" followed by three blue underlined links: "CD-64 LIEN REQUEST MR.XLS", "Collection Hearing Cases", and "CD-64 LIEN REQUEST NON MR.XLS". At the bottom, a red note states: "NOTE: You must use Internet Explorer to get to these links - Firefox does not currently support the file link".

Accessibility Off | Tree | Recent | Favorites | Utilities | Help

Welcome to the Collections Dashboard!

NH Deeds | Real Data | Google | NH Corporate | Collections folder

Single View Taxpayer | Collections Web Links | Collections Document Links | Collections Folders | Phone and Maps | Collection Reports | M&R Reports

COLL_Documents

COLLECTIONS DOCUMENTS:

[CD-64 LIEN REQUEST MR.XLS](#) [Collection Hearing Cases](#)

[CD-64 LIEN REQUEST NON MR.XLS](#)

NOTE: You must use Internet Explorer to get to these links - Firefox does not currently support the file link

Collection Reports

Welcome to the Collections Dashboard!

■ NH Deeds ■ Real Data ■ Google ■ NH Corporate ■ Collections folder

Single View Taxpayer | Collections Web Links | Collections Document Links | Collections Folders | Phone and Maps | Collection Reports | M&R Reports

Collection Reports

COLLECTION REPORTS

For ALL reports, select type of display output for the report.

HTML

For ALL reports, select Region Code: ALL

- [Collection Query by CO](#)
- [Tax Notices over \\$50,000 by CO](#)
- [Tax Notices Assigned & Closed within Past 30 Days](#)
- [Top 25 Taxpayers by Region Code by CO](#)
- [Total Dollars & Tax Notices Assigned by Tax Type](#)
- [Tax Notices Assigned within Past 15 Days](#)
- [Taxpayer's Balance Summary](#)

Most Popular Links

Welcome to the Collections Dashboard!

NH Deeds | **Real Data** | **Google** | **NH Corporate** | **Collections folder**

Single View Taxpayer | Collections Web Links | Collections Document Links | Collections Folders | Phone and Maps | Collection Reports | M&R Reports

Collection Reports

COLLECTION REPORTS

For ALL reports, select type of display output for the report.

HTML

For ALL reports, select Region Code: ALL

- [Collection Query by CO](#)
- [Tax Notices over \\$50,000 by CO](#)
- [Tax Notices Assigned & Closed within Past 30 Days](#)
- [Top 25 Taxpayers by Region Code by CO](#)
- [Total Dollars & Tax Notices Assigned by Tax Type](#)
- [Tax Notices Assigned within Past 15 Days](#)
- [Taxpayer's Balance Summary](#)

Single View of the Taxpayer

Accessibility Off | Tree | Recent | Favorites | Utilities | Help

Welcome to the Collections Dashboard!

NH Deeds | Real Data | Google | NH Corporate | Collections folder

Single View Taxpayer | Collections Web Links | Collections Document Links | Collections Folders | Phone and Maps | Collection Reports | M&R Reports | Director's Reports

SingleViewTaxpayer

Single View Taxpayer

1. Select Search Category: All

2. Select Search Type: Name, ID, Phone Number Address

3. Enter Search Criteria: PIZZA

4. Start Search: Search

Taxpayer Search Results for PIZZA

Located in:	Found	FEI/SSN:	Name:
Business - Primary Name	AARDVARKS AMUSEMENTS & PIZZARIA INC	██████████	Name: AARDVARKS AMUSEMENTS & PIZZARIA INC
	ACROPOLIS PIZZA RESTAURANT	██████████	Name: ACROPOLIS PIZZA RESTAURANT
	AD&JB PIZZA INC	██████████	Name: AD&JB PIZZA INC
	ALEXANDRON FAMILY PIZZA OF PELHAM INC	██████████	Name: ALEXANDRON FAMILY PIZZA OF PELHAM INC
	ALPHA PIZZA	██████████	Name: ALPHA PIZZA
	ALPHA PIZZA RESTAURANT	██████████	Name: ALPHA PIZZA RESTAURANT

Within the Single View Taxpayer application, the user may search for a particular taxpayer. Searching may be done either by name, ID, phone number or address.

Google and SOS

Accessibility Off | Tree | Recent | Favorites | Utilities | Help

Welcome to the Collections Dashboard!

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Single View Taxpayer | Collections Web Links | Collections Document Links | Collections Folders | Phone and Maps | Collection Reports | M&R Reports | Director's Reports

SingleViewTaxpayer

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1. Select Search Category: All

2. Select Search Type: Name, ID, Phone Number Address

3. Enter Search Criteria: PIZZA

4. Start Search: Search

Taxpayer Search Results for PIZZA

Located in:	Found	FEI/SSN:	Name:
Business - Primary Name	AARDVARKS AMUSEMENTS & PIZZARIA INC	XXXXXXXXXX	Name: AARDVARKS AMUSEMENTS & PIZZARIA INC
	ACROPOLIS PIZZA RESTAURANT	XXXXXXXXXX	Name: ACROPOLIS PIZZA RESTAURANT
	SOS Search	XXXXXXXXXX	Name: AD&JB PIZZA INC
	Google Business Name	XXXXXXXXXX	Name: ALEXANDRON FAMILY PIZZA OF PELHAM INC
	OF PELHAM INC	XXXXXXXXXX	Name: ALPHA PIZZA
	ALPHA PIZZA	XXXXXXXXXX	Name: ALPHA PIZZA RESTAURANT
	ALPHA PIZZA RESTAURANT	XXXXXXXXXX	Name: ALPHA PIZZA RESTAURANT
	AMHERST CIAOS PIZZA INC	XXXXXXXXXX	Name: AMHERST CIAOS PIZZA INC

Selecting your left mouse button on "Found" value will display a pop up menu, which will allow you to either do a SOS or Google search of that taxpayer name.

Research

Accessibility Off | Tree | Recent | Favorites | Utilities | Help

Welcome to the Collections Dashboard!

NH Deeds | Real Data | Google | NH Corporate | Collections folder

Single View Taxpayer | Collections Web Links | Collections Document Links | Collections Folders | Phone and Maps | Collection Reports | M&R Reports | Director's Reports

SingleViewTaxpayer

Single View Taxpayer

1. Select Search Category: All

2. Select Search Type: Name, ID, Phone Number Address

3. Enter Search Criteria: PIZZA

4. Start Search: Search

Misc. Tax - Account Name	PIZZA ELAINE C	FEI/SSN: [REDACTED]	ACCTTYPE: GW, Name: PIZZA ELAINE C
MAR - Taxpayer Name	ALL STAR PIZZA	FEI/SSN/LIC: [REDACTED] FEI/SSN/LIC2: [REDACTED]	Tax Type: MR, Name: ALL STAR PIZZA
	AUGUSTA BRISTOL PIZZA LLC	FEI/SSN/LIC: [REDACTED] FEI/SSN/LIC2: [REDACTED]	Tax Type: BS, Name: AUGUSTA BRISTOL PIZZA LLC
	BEACHNUT HOUSE OF PIZZA	FEI/SSN/LIC: [REDACTED] FEI/SSN/LIC2: [REDACTED]	Tax Type: MR, Name: BEACHNUT HOUSE OF PIZZA
	BESTA ONE PIZZA INC	FEI/SSN/LIC: [REDACTED] FEI/SSN/LIC2: [REDACTED]	Tax Type: BS, Name: BESTA ONE PIZZA INC
	BESTA ONE PIZZA INC DBA	FEI/SSN/LIC: [REDACTED] FEI/SSN/LIC2: [REDACTED]	Tax Type: MR, Name: BESTA ONE PIZZA INC DBA
	BESTA ONE PIZZA		Tax Type: MR, Name: BESTA ONE PIZZA
	BIG CHEESE PIZZA & MORE	FEI/SSN/LIC: [REDACTED] FEI/SSN/LIC2: [REDACTED]	Tax Type: MR, Name: BIG CHEESE PIZZA & MORE
Located in:	Found		
MAR - Taxpayer Name	BIG MAMMA'S PIZZA	FEI/SSN/LIC: [REDACTED] FEI/SSN/LIC2: [REDACTED]	Tax Type: MR, Name: BIG MAMMA'S PIZZA

Selecting your left mouse button on the taxpayer id will display a pop up menu, which will allow you to view more details about that particular taxpayer.

Taxpayer Detail

EFile Info	Relationships	Missing Mth.	Remarks	Maintenance	Address	Docs Batched	Tax Notices	Returns	LM claims	ACTS Info	Tobacco
DES Info	Officer Titles	Contact Info	History	Abatements	Refunds	Payments	Error Susp.	Account Info	Misc Tax	2275 Info	Manual AR

Scanned DLNs

Tax Type: MR, Name: [REDACTED]

Address Info

Taxpayer ID:	[REDACTED]	Data Source:	TIMS-BL
Street:	[REDACTED]		
Street2:	[REDACTED]		
City State Zip:	[REDACTED]	NH	03053
County Country:	[REDACTED]		
Attention:	[REDACTED]		

Taxpayer ID:	[REDACTED]	Data Source:	TIMS-MR
Street:	[REDACTED]		
Street2:	[REDACTED]		
City State Zip:	[REDACTED]	NH	03053
County Country:	[REDACTED]		

Get Info	Get Info
Bankruptcy found	No Missing Docs
Get Info	Get Info
No POA or Audit flag	No Hearings
Get Info	Get Info
Collections TN found	Lien found

Relationships

ID(s) found:	FEI/SSN/LIC:	FEI/SSN/LIC2:	Information:
MAR - FEI/SSN/LIC:	[REDACTED]	[REDACTED]	Tax Type: MR, Name: [REDACTED]
Officer.SSN.c:	[REDACTED]	LIC.c:	Officer Name: [REDACTED], Title: PRESIDENT, End Date: 099999999
Officer.SSN.c:	[REDACTED]	LIC.c:	Officer Name: [REDACTED] SR, Title: TREASURER, End Date: 020090630

Tax Notices

Period End Date	Tax Type	Version	AssessNo	Amount Due	Status	Name on Notice
05/31/2011	MR	1		\$3,384.05	Suspended	[REDACTED]
04/30/2011	MR	1		\$1,773.05	Suspended	[REDACTED]
02/28/2011	MR	1		\$1,000.00	Suspended	[REDACTED]

A new web page will be shown with the taxpayer details. Address information, Relationships, tax notices and more can be viewed from this page.

Tax Notices

EFile Info	Relationships	Missing Mth.	Remarks	Maintenance	Address	Docs Batched	Tax Notices	Returns	LM claims	ACTS Info	Tobacco
DES Info	Officer Titles	Contact Info	History	Abatements	Refunds	Payments	Error Susp.	Account Info	Misc.Tax	2275 Info	Manual AR

Scanned DLNs

Taxpayer Details for [REDACTED]

Tax Type: MR, Name: [REDACTED]

Tax Notices in Collections

Status	Period End Date	Tax Type	AssessNo	Division	CO	CO ID	Assign Compliance Date	Reassign User	Amount Due	Name
Issued	09/30/2008	MR		COL	08	[REDACTED]	11/18/2011	[REDACTED]	\$31.78	ALL STAI PIZZ
Issued	08/31/2010	MR		COL	08	[REDACTED]	01/10/2012	[REDACTED]	\$290.22	ALL STAI PIZZ
Issued	09/30/2010	MR		COL	08	[REDACTED]	01/10/2012	[REDACTED]	\$1,698.50	ALL STAI PIZZ

[Get Info](#)
Bankruptcy found

[Get Info](#)
No Missing Docs

[Get Info](#)
No POA or Audit flag

[Get Info](#)
No Hearings

[Get Info](#)
Collections TN found

[Get Info](#)
Lien found

Relationships

ID(s) found:
[MAR - FEI/SSN/LIC:](#) [FEI/SSN/LIC2:](#)

[Officer SSN:](#) [LIC:](#)

[Officer SSN:](#) [LIC:](#)

Information:
 Tax Type: MR, Name: [REDACTED]

Officer Name: [REDACTED], Title: PRESIDENT, End Date: 099999999

Officer Name: [REDACTED] SR, Title: TREASURER, End Date: 020090630

Tax Notices

Period End Date	Tax Type	Version	AssessNo	Amount Due	Status	Name on Notice
05/31/2011	MR	1		\$3,384.05	Suspended	[REDACTED]
04/30/2011	MR	1		\$1,773.05	Suspended	[REDACTED]
02/28/2011	MR	1		\$1,000.00	Suspended	[REDACTED]

Clicking on "Get Info" in the "Collections TN found" message box will display the "Tax Notices in Collections" report.

Lien Information

[EFile Info](#) [Relationships](#) [Missing Mth.](#) [Remarks](#) [Maintenance](#) [Address](#) [Docs Batched](#) [Tax Notices](#) [Returns](#) [LM claims](#) [ACTS Info](#) [Tobacco](#)
[DES Info](#) [Officer Titles](#) [Contact Info](#) [History](#) [Abatements](#) [Refunds](#) [Payments](#) [Error Susp.](#) [Account Info](#) [Misc.Tax](#) [2275 Info](#) [Manual AR](#)

Scanned DLNs

Taxpayer Details for [REDACTED]

Tax Type: MR, Name: [REDACTED]

Lien info

Lien Begin Date	Lien Begin Date	CD No.	Lien Status	Amount	Lien Expire Date	Lien Release Date	Assessment Number	Tax Type	Compliance Region Code	LSOURCE
01/25/2011	01/25/2017	2998	A	27.44			63205	MR	o	S C

[Get Info](#)
Bankruptcy found

[Get Info](#)
No Missing Docs

[Get Info](#)
No POA or Audit flag

[Get Info](#)
No Hearings

[Get Info](#)
Collections TN found

[Get Info](#)
Lien found

Relationships

ID(s) found:
MAR - FEI/SSN/LIC: [REDACTED] FEI/SSN/LIC2: [REDACTED]

Information:
Tax Type: MR, Name: [REDACTED]

Officer SSN: [REDACTED] LIC: [REDACTED] Officer Name: [REDACTED]
Title: PRESIDENT, End Date: 09999999

Officer SSN: [REDACTED] LIC: [REDACTED] Officer Name: [REDACTED]
SR, Title: TREASURER, End Date: 020090630

Tax Notices

Period End Date	Tax Type	Version	Assess.No	Amount Due	Status	Name on Notice
05/31/2011	MR	1		\$3,384.05	Suspended	[REDACTED]
04/30/2011	MR	1		\$1,773.05	Suspended	[REDACTED]
02/28/2011	MR	1		\$1,000.00	Suspended	[REDACTED]

Clicking on "Get Info" in the "Lien found" message box will display the "Lien Info" report.

Account History

EFile Info	Relationships	Missing Mth.	Remarks	Maintenance	Address	Docs Batched	Tax Notices	Returns	LM claims	ACTS Info	Tobacco
DES Info	Officer Titles	Contact Info	History	Abatements	Refunds	Payments	Error Susp.	Account Info	Misc.Tax	2275 Info	Manual AR

Scanned DLNs

Tax Type: MR, Name: [REDACTED]

History

Tax Type	TR CODE	TR SEX	TAX PRD	POST DATE	STAMP DATE	AMOUNT DUE/CHARGED	DEB/CR AMOUNT	BALANCE
MR	NTOT		05/31/2011	06/20/2011	06/20/2011	7.05	.00	3384.05
	RET	SKY	05/31/2011	06/03/2011	05/27/2011	.00	.00	.00
		SYS	05/31/2011	06/03/2011	05/27/2011	3377.00	.00	3377.00
	NTOT		04/30/2011	06/06/2011	06/06/2011	5.03	.00	1773.05
	RET	SKY	04/30/2011	06/03/2011	05/27/2011	.00	.00	.00
		SYS	04/30/2011	06/03/2011	05/27/2011	1768.02	.00	1768.02
	NTOT		03/31/2011	05/03/2011	05/03/2011	4.28	.00	1771.54
	RET	SKY	03/31/2011	05/03/2011	04/26/2011	.00	.00	.00
		SYS	03/31/2011	05/03/2011	04/26/2011	1767.26	.00	1767.26

[Get Info](#)

Bankruptcy found

[Get Info](#)

No Missing Docs

[Get Info](#)

No POA or Audit flag

[Get Info](#)

No Hearings

[Get Info](#)

Collections TN found

[Get Info](#)

Lien found

Relationships

ID(s) found:

MAR - FEI/SSN/LIC: [REDACTED] FEI/SSN/LIC2: [REDACTED]

Officer SSN: [REDACTED] LIC: [REDACTED]

Officer SSN: [REDACTED] LIC: [REDACTED]

Information:

Tax Type: MR, Name: [REDACTED]

Officer Name: [REDACTED]
Title: PRESIDENT,
End Date: 099999999

Officer Name: [REDACTED]
SR, Title: TREASURER,
End Date: 020090630

Tax Notices

Period End Date	Tax Type	Version	Assess.No	Amount Due	Status	Name on Notice
05/31/2011	MR	1		\$3,384.05	Suspended	[REDACTED]
04/30/2011	MR	1		\$1,773.05	Suspended	[REDACTED]
03/31/2011	MR	1		\$1,771.54	Suspended	[REDACTED]

Clicking on the blue "History" button will display the "History" report.

Documents Batched

EFile Info	Relationships	Missing Mth.	Remarks	Maintenance	Address	Docs Batched	Tax Notices	Returns	LM claims	ACTS Info	Tobacco
DES Info	Officer Titles	Contact Info	History	Abatements	Refunds	Payments	Error Susp.	Account Info	Misc.Tax	2275 Info	Manual AR

Scanned DLNs

Taxpayer Details for [REDACTED]

Tax Type: MR, Name: [REDACTED]

ID	Count	Description	PROC	Start Date	End Date	Amount	Code	Date	
536645	2	No Money	PROC	01/06/2011	11/01/2010	11/30/2010	.00	051	01/04/2011
535945	4	NFS Bounced Check	PROC	12/12/2011	09/01/2010	09/30/2010	100.00	050	12/23/2010
	5	NFS Bounced Check	PROC	12/23/2010	10/01/2010	10/31/2010	150.00	050	12/23/2010
535513	14	Payment Document	PROC	12/09/2011	09/01/2010	09/30/2010	100.00	051	12/15/2010
	19	Payment Document	PROC	12/17/2010	10/01/2010	10/31/2010	150.00	051	12/15/2010
533808	5	NFS Bounced Check	LOCK	11/14/2011	09/01/2010	09/30/2010	1471.59	050	11/09/2010
530719	3	Payment Document	PROC	12/07/2011	09/01/2010	09/30/2010	1470.41	05R	10/15/2010

[Get Info](#)
Bankruptcy found

[Get Info](#)
No Missing Docs

[Get Info](#)
No POA or Audit flag

[Get Info](#)
No Hearings

[Get Info](#)
Collections TN found

[Get Info](#)
Lien found

Relationships

ID(s) found:
MAR - FEI/SSN/LIC: [REDACTED] FEI/SSN/LIC2: [REDACTED]

Officer SSN: [REDACTED] LIC: [REDACTED]

Officer SSN: [REDACTED] LIC: [REDACTED]

Information:
Tax Type: MR, Name: [REDACTED]

Officer Name: [REDACTED], Title: PRESIDENT, End Date: 099999999

Officer Name: [REDACTED] SR, Title: TREASURER, End Date: 020090630

Tax Notices

Period End Date	Tax Type	Version	AssessNo	Amount Due	Status	Name on Notice
05/31/2011	MR	1		\$3,384.05	Suspended	[REDACTED]
04/30/2011	MR	1		\$1,773.05	Suspended	[REDACTED]
02/28/2011	MR	1		\$1,000.00	Suspended	[REDACTED]

Clicking on the blue “Docs Batched” button will display the “Documents Batched” report. This report is color coded to indicate to the user the type of document batched.

Tax Notices and Return Payments

[EFile Info](#) [Relationships](#) [Missing Mth.](#) [Remarks](#) [Maintenance](#) [Address](#) [Docs Batched](#) [Tax Notices](#) [Returns](#) [LM claims](#) [ACTS Info](#) [Tobacco](#)
[DES Info](#) [Officer Titles](#) [Contact Info](#) [History](#) [Abatements](#) [Refunds](#) [Payments](#) [Error Susp.](#) [Account Info](#) [Misc.Tax](#) [2275 Info](#) [Manual AR](#)

Scanned DLNs

Taxpayer Details for [REDACTED]

Tax Type: MR, Name: [REDACTED]

Tax Notice and Return Payments

Period Begin Date	Period End Date	Form ID	Description	Doc Type	Control Amount	Batch Status	Batch Status Date	Tax Year
09/01/2010	09/30/2010	DP79	MEALS AND RENTALS TAX NOTICE	054	\$565.06	PROC	12/14/2011	2010
		RETPYTMR	M&R TAX RETURN PAYMENT	05R	\$1,470.41	PROC	12/07/2011	2010
08/01/2010	08/31/2010	DP79	MEALS AND RENTALS TAX NOTICE	054	\$240.50	PROC	12/05/2011	2010
07/01/2010	07/31/2010	DP79	MEALS AND	054	\$234.88	PROC	10/19/2010	2010

[Get Info](#) **Bankruptcy found**

[Get Info](#) **No Missing Docs**

[Get Info](#) **No POA or Audit flag**

[Get Info](#) **No Hearings**

[Get Info](#) **Collections TN found**

[Get Info](#) **Lien found**

Relationships

ID(s) found:
[MAR - FEI/SSN/LIC:](#) [FEI/SSN/LIC2:](#)

[Officer SSN:](#) [LIC:](#)

[Officer SSN:](#) [LIC:](#)

Tax Notices

Period End Date	Tax Type	Version	AssessNo	Amount Due	Status	Name on Notice
05/31/2011	MR	1		\$3,384.05	Suspended	[REDACTED]
04/30/2011	MR	1		\$1,773.05	Suspended	[REDACTED]

Clicking on the blue "Returns" button displays the "Tax Notice and Returns Payments" report.

TIMS Remarks

		DATE
		ENTERED
R2020GS2/R2020G01	M&R	03/19/2012
DPTTIMS2	REMARKS INQUIRY	10:41:39
LICENSE NO: (REDACTED)	NAME: (REDACTED)	
OPERATOR: (REDACTED)	Div: COL	
REMARKS:		
(REDACTED) IS APT COMPLEX PEL		09/07/11
COLLECTION CALL TO TAXPAYER		08/08/11
REC'D RETURN MAIL FOR MISSING MONTHLY. LISA Q VISITED BUSINESS IN MAY		08/08/11
TO CONFIRM BUSINESS CLOSED. WILL INACTIVATE AS OF 5/31/11 (BR)		08/08/11
LISA CALLED OFFICE SHE HEARD THAT HE IS CLOSED SHE WENT BY BUZ HE IS C		05/27/11
LOSED		05/27/11
TD BANK - NO ACCOUNTS 5/13/11		05/20/11
ST MARYS BANK - ACCOUNT CLOSED 5/18/11		05/20/11
SENT LIENS TO BANKS:		05/09/11
CITIZENS		05/09/11
HAMPSHIRE FIRST		05/09/11
BANK OF AMERICA		05/09/11
SOVEREIGN		05/09/11
ST MARYS		05/09/11
F3=EXIT	F7=GO BACK	

Previously, the user would need to the TIMS application and go through various screens before seeing the taxpayer remarks. As you can see, the remarks are not as readable as they are within the Single View Taxpayer application.

Remarks

EFile Info	Relationships	Missing Mth.	Remarks	Maintenance	Address	Docs Batched	Tax Notices	Returns	LM claims	ACTS Info	Tobacco
DES Info	Officer Titles	Contact Info	History	Abatements	Refunds	Payments	Error Susp.	Account Info	Misc.Tax	2275 Info	Manual AR

Scanned DLNs

Tax Type: MR, Name: [REDACTED]

Remarks

Remark Date	User	Remark
01/20/2012	[REDACTED]	MAIL SENT 1/10/12 WAS RETURNED AS UNDELIVERABLE AT THE C/O [REDACTED], [REDACTED] ADDRESS. PER ACCURINT, THE NEW ADDRESS AS OF 12/2011 IS: 555 [REDACTED] ALSO PER ACCURINT, PHONE IS 603-[REDACTED]. FORWARDED TAX NOTICES TO NEW ADDRESS TODAY.
09/07/2011	[REDACTED]	15 IRON HORSE DR IS APT COMPLEX PEL
08/08/2011	[REDACTED]	COLLECTION CALL TO TAXPAYER REC'D RETURN MAIL FOR MISSING MONTHLY. [REDACTED] VISITED BUSINESS IN MAY TO CONFIRM BUSINESS CLOSED.WILL INACTIVATE AS OF 5/31/11(BR)

[Get Info](#)
Bankruptcy found

[Get Info](#)
No Missing Docs

[Get Info](#)
No POA or Audit flag

[Get Info](#)
No Hearings

[Get Info](#)
Collections TN found

[Get Info](#)
Lien found

No Manual AR remarks found.

Tax Notices

Period End Date	Tax Type	Version	AssessNo	Amount Due	Status	Name on Notice
05/31/2011	MR	1		\$3,384.05	Suspended	[REDACTED]
04/30/2011	MR	1		\$1,773.05	Suspended	[REDACTED]
03/31/2011	MR	1		\$1,000.00	Suspended	[REDACTED]

Clicking on the blue "Remarks" button will display the Remarks report. The most recent remarks are shown first and readable format. If any Manual AR remarks exist, they will be displayed below the Remarks report.

E-File

EFile Info	Relationships	Missing Mth.	Remarks	Maintenance	Address	Docs Batched	Tax Notices	Returns	LM claims	ACTS Info	Tobacco
DES Info	Officer Titles	Contact Info	History	Abatements	Refunds	Payments	Error Susp.	Account Info	Misc.Tax	2275 Info	Manual AR

Taxpayer Details for [REDACTED]

Tax Type: MR, Name: [REDACTED]

Efile info

Taxpayer Reference Number	[REDACTED]	Taxpayer Reference IND	M
Entity Type	9	License FEIN	[REDACTED]
Business FEIN		Export Status	N
Efile Status	D	Telefile Status	D
Web Import Flag	N	ID Tax Flag	N
BS Tax Flag	N	Real Estate Tax Flag	N
Name	[REDACTED]		
MR Officer FEIN 1	[REDACTED]	MR Officer FEIN 2	[REDACTED]
MR Office FEIN 3	[REDACTED]		

Scanned DLNs

[Get Info](#)
Bankruptcy found

[Get Info](#)
No Missing Docs

[Get Info](#)
No POA or Audit flag

[Get Info](#)
No Hearings

[Get Info](#)
Collections TN found

[Get Info](#)
Lien found

No EFile contact records found.

Tax Notices

Period End Date	Tax Type	Version	AssessNo	Amount Due	Status	Name on Notice
05/31/2011	MR	1		\$3,384.05	Suspended	[REDACTED]
04/30/2011	MR	1		\$1,773.05	Suspended	[REDACTED]
04/30/2011	MR	1		\$1,773.05	Suspended	[REDACTED]

Clicking on the blue “E-file Info” button will display two E-File related reports; E-File general account information, and E-File contact information.

Manual AR: PC App

The screenshot displays two overlapping windows from the 'Manual AR' PC application. The background window is titled 'Accounts Receivable - Transactions' and shows a list of transactions. The foreground window is titled 'Accounts Receivable - Manual Tax Notice' and contains the following information:

TAX PERIOD: 08/10

Assess No	Version	Tran Code
63205		TNPY
63205		TNPY
63205	1	NTOT

TAXPAYER INFORMATION
ASSESSMENT: 63205
VERSION: 1
STATUS: BALDUE
ACTION COD: RETAIN

TAX TYPE: MR

NAME & ADDRESS
Primary: [Redacted]
Secondary: [Redacted]
Address 1: DBA ALL STAR PIZZA
Address 2: [Redacted] DR
City, State, Zip: [Redacted] NJ [Redacted]
County/Prov: [Redacted]
Country: [Redacted]

ORIGINAL ISSUE DATE: 01/25/2011
ISSUE DATE: 01/25/2011
CREATED BY: SYSTEM
ASSIGNED TO: CTS

AUDITOR: [Redacted]
APPROVED: [Redacted]
RE-ASSIGNED: [Redacted]
ASSIGNED COMPLIAN: [Redacted]
CF DATE: [Redacted]

TAX PERIOD: 8/1/2010 - 8/31/2010
Delinquency Stat: [Redacted] **ORG DI:** COL

EXPLANATION:
PAYMENT HISTORY: | CHARGES: | AMOUNTS DUE: | REASON CODES: |

Date	Description	Amount
------	-------------	--------

Previously, the user would need to launch the Manual AR PC application to get any Manual Tax notice information for a particular taxpayer ID. They would first need to search for that particular taxpayer, and then drill down to the particular tax notice that they want to see information on.

Manual AR Report

EFile Info	Relationships	Missing Mth.	Remarks	Maintenance	Address	Docs Batched	Tax Notices	Returns	LM claims	ACTS Info	Tobacco
DES Info	Officer Titles	Contact Info	History	Abatements	Refunds	Payments	Error Susp.	Account Info	Misc.Tax	2275 Info	Manual AR

Taxpayer Details for [REDACTED]

Tax Type: MR, Name: [REDACTED]

Scanned DLNs

Manual AR Tax Notices

Period End Date	Assess No.	Version No.	Tax Type	Status	Status Date	Issue Date	Creator	Approver	Division	Tot Pay
08/31/2010	63205	1	MR	Balance Due	06/21/2011	01/25/2011	SYS	[REDACTED]	CTS	
	65028	1	MR	Issued	01/10/2012	01/10/2012	[REDACTED]	[REDACTED]	COL	

Get Info

Bankruptcy
found

Get Info

No Missing
Docs

Get Info

No POA or
Audit flag

Get Info

No Hearings

Get Info

Collections
TN found

Get Info

Lien found

No Manual AR remarks found.

Manual AR Transactions

Status	Transaction Code	Transaction Suffix	Assess #	Tax Type	Period End Date	Primary Stamp Date
A	NTOT		63205	MR	08/31/2010	01/25/2011
A	TNPY		63205	MR	08/31/2010	02/11/2011
A	TNPY	BKO	63205	MR	08/31/2010	02/11/2011
A	NTOT		65028	MR	08/31/2010	01/10/2012

Clicking the “Manual AR” button will display three Manual AR related reports – Tax Notices, Remarks and Transactions.

Document Search: PC App

Division Requests	551699	01	REQUESTED	11/29/2011 2:04 PM	REQUESTED	NORMAL	11/29/2011 2:04	272438
	513046	05	REQUESTED	11/29/2011 1:43 PM	REQUESTED	NORMAL	11/29/2011 1:43	272435
	547171	04	REQUESTED	11/29/2011 12:46 P	REQUESTED	NORMAL	11/29/2011 12:4	272421
New Request	561349	00	REQUESTED	11/29/2011 12:45 P	REQUESTED	NORMAL	11/29/2011 12:4	272420
	561345	00	REQUESTED	11/29/2011 12:45 P	REQUESTED	NORMAL	11/29/2011 12:4	272419
Pulls	565618	00	RECHARGE PENDI	11/29/2011 12:12 P	RECHARGE ACCEP	NORMAL	11/29/2011 11:4	271811
	566058	00	RECHARGE PENDI	11/29/2011 11:43 A	RECHARGE ACCEP	NORMAL	11/29/2011 10:5	271958
Accept	566004	00	RECHARGE PENDI	11/29/2011 11:43 A	RECHARGE ACCEP	NORMAL	11/29/2011 10:5	272023
	566002	00	RECHARGE PENDI	11/29/2011 11:43 A	RECHARGE ACCEP	NORMAL	11/29/2011 10:5	272021
Recharge	566001	00	RECHARGE PENDI	11/29/2011 11:43 A	RECHARGE ACCEP	NORMAL	11/29/2011 10:5	271922
	566000	00	RECHARGE PENDI	11/29/2011 11:43 A	RECHARGE ACCEP	NORMAL	11/29/2011 10:5	271921
Accept Recharge	565998	00	RECHARGE PENDI	11/29/2011 11:43 A	RECHARGE ACCEP	NORMAL	11/29/2011 10:5	271919
	565615	00	RECHARGE PENDI	11/29/2011 11:44 A	RECHARGE ACCEP	NORMAL	11/29/2011 10:5	271808
Refile	458732	07	REQUESTED	11/29/2011 10:31 A	REQUESTED	NORMAL	11/29/2011 10:3	272405
	546354	05	REQUESTED	11/29/2011 10:03 A	REQUESTED	NORMAL	11/29/2011 10:0	272403
Sync-Data	428577	04	REQUESTED	11/29/2011 8:55 AM	REQUESTED	NORMAL	11/29/2011 8:55	272401
	523341	08	REQUESTED	11/29/2011 8:08 AM	REQUESTED	NORMAL	11/29/2011 8:08	272397
Reprint 2275	530549	01	REQUESTED	11/29/2011 8:07 AM	REQUESTED	NORMAL	11/29/2011 8:07	272396
	509533	08	REQUESTED	11/29/2011 11:19 A	ACCEPTED	NORMAL	11/28/2011 4:10	272384
Not Accepted	564663	01	REQUESTED	11/29/2011 11:26 A	ACCEPTED	NORMAL	11/28/2011 2:58	272378
	497344	05	REQUESTED	11/29/2011 11:26 A	ACCEPTED	NORMAL	11/28/2011 2:55	272377
	529948	10	REQUESTED	11/29/2011 11:26 A	ACCEPTED	NORMAL	11/28/2011 2:55	272376
	566948	00	REQUESTED	11/28/2011 2:48 PM	ACCEPTED	NORMAL	11/28/2011 2:48	272375
	541073	01	REQUESTED	11/29/2011 11:07 A	ACCEPTED	NORMAL	11/28/2011 2:26	272374
	567342	00	ACCEPT REQUIRED	11/29/2011 10:18 A	PULLED	NORMAL	11/28/2011 1:24	272371
	567049	01	REQUESTED	11/29/2011 11:19 A	ACCEPTED	NORMAL	11/28/2011 12:4	272370
	567051	01	REQUESTED	11/29/2011 11:19 A	ACCEPTED	NORMAL	11/28/2011 12:3	272369
	567050	01	REQUESTED	11/29/2011 11:19 A	ACCEPTED	NORMAL	11/28/2011 12:3	272368

Previously, users would need to invoke the 2275 application directly, to search documents. However, there is no way in this application to find a particular users documents, you must already know the batch and position number of each document.

Document Search Report

EFile Info	Relationships	Missing Mth.	Remarks	Maintenance	Address	Docs Batched	Tax Notices	Returns	LM claims	ACTS Info	Tobacco
DES Info	Officer Titles	Contact Info	History	Abatements	Refunds	Payments	Error Susp.	Account Info	Misc.Tax	2275 Info	Manual AR

Taxpayer Details for [REDACTED]

Tax Type: MR, Name: [REDACTED]

Scanned DLNs

Documents in 2275

Batch Number	Position Number	Doc Type	Tax Year	Username	Division	Type	Transaction Date/Time
533808	5	050	2010	[REDACTED]	RET	REFILED	02/14/2012 4:13PM
		050	2010	[REDACTED]	RET	RETURNED	01/10/2012 11:29AM
		050	2010	[REDACTED]	RET	ACCEPTED	11/10/2011 11:24AM
		050	2010	[REDACTED]	RET	PULLED	11/10/2011 9:52AM
		050	2010	[REDACTED]	RET	REQUESTED	11/09/2011 12:35PM

Get Info

Bankruptcy found

Get Info

No Missing Docs

Get Info

No POA or Audit flag

Get Info

No Hearings

Get Info

Collections TN found

Get Info

Lien found

No Manual AR remarks found.

Manual AR Transactions

Status	Transaction Code	Transaction Suffix	Assess #	Tax Type	Period End Date	Primary Stamp Date
A	NTOT		63205	MR	08/31/2010	01/25/2011
A	TNPY		63205	MR	08/31/2010	02/11/2011
A	TNPY	BKO	63205	MR	08/31/2010	02/11/2011
A	NTOT		65028	MR	08/31/2010	01/10/2012

Clicking the "2275 Info" button will display the "Documents in 2275" report, allowing the user to see who has had any interactions with the physical documents for the particular taxpayer.

Tax Notice Summary

EFile Info	Relationships	Missing Mth.	Remarks	Maintenance	Address	Docs Batched	Tax Notices	Returns	LM claims	ACTS Info	Tobacco
DES Info	Officer Titles	Contact Info	History	Abatements	Refunds	Payments	Error Susp.	Account Info	Misc.Tax	2275 Info	Manual AR

Scanned DLNs

Taxpayer Details for **XXXXXXXXXX**

Tax Type: MR, Name: **XXXXXXXXXX**

Tax Notices

[Show ALL Tax Notices](#)

Date	Type	Version	AssessNo	Amount Due	Status	Name on Notice	Issue Date	Creator	Approver
05/31/2011	MR	1		\$3,384.05	Suspended	XXXXXXXXXX	06/20/2011	SYS	SYS
04/30/2011	MR	1		\$1,773.05	Suspended	XXXXXXXXXX	06/06/2011	SYS	SYS
03/31/2011	MR	1		\$1,771.54	Suspended	XXXXXXXXXX	05/03/2011	SYS	SYS

[Get Info](#)

Bankruptcy found

[Get Info](#)

No Missing Docs

[Get Info](#)

No POA or Audit flag

[Get Info](#)

No Hearings

[Get Info](#)

Collections TN found

[Get Info](#)

Lien found

No Manual AR remarks found.

Manual AR Transactions

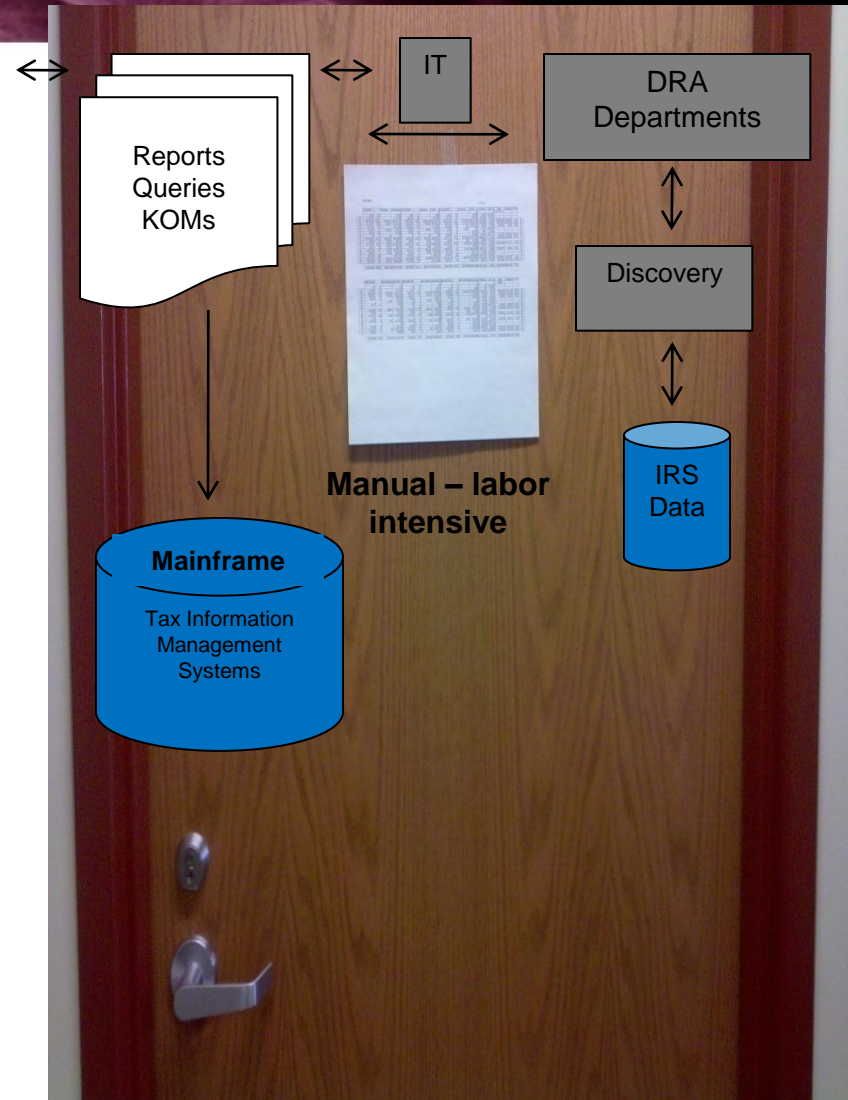
Status	Transaction Code	Transaction Suffix	Assess #	Tax Type	Period End Date	Primary Stamp Date
A	NTOT		63205	MR	08/31/2010	01/25/2011
A	TNPY		63205	MR	08/31/2010	02/11/2011
A	TNPY	BKO	63205	MR	08/31/2010	02/11/2011
A	NTOT		65028	MR	08/31/2010	01/10/2012

Clicking the blue "Tax Notices" button will display the "Tax Notices" report. This report sums up the amount due at the bottom of the report. You may view all notices by using the left mouse button menu on the "Tax Notices" title.

Operational Reports

Existing Capabilities

- Manual Queries and Daily Reports
- Manual Projection Based Analysis
- Manual Trending Capabilities
- Limited Ability to respond to Revenue Inquiries / Forecast requests.
- No effective Dashboards
- Data Analyst required to build queries
- No Ad Hoc Reporting
- No Single View of Taxpayer
- Data accessibility issues



Much Data – Limited information

Ops Reports via WebFocus

Central Tax Notices

15245 of 15245 records, Page 1 of 763

Current Tax Notices(that are not liens) Status = ('01','02','03','05','06','08')

DRA Org ID	ASSESSNO	Status	Lien Identifier	Tax Type	NAME	FEISSNLIC	Ind.	Tax Year	Amount Due	Create Initials	Issue Date	Age
CTS		01		BP	L		5	19921231	\$68.26	SYS		
CTS		01		BP	F		4	19911231	\$50.00	SYS		
CTS		01		BP	M		3	19901231	\$204.01	SYS		
CTS		01		BP	F		0	19910126	\$655.90	SYS		
CTS		01		BP	E		4	19921231	\$60.00	SYS		
CTS		01		BP	C		7	19921231	\$111.78	SYS		
CTS		01		BP	E		9	19921231	\$136.55	SYS		
CTS		01		BP	C		4	19921231	\$105.21	SYS		
CTS		01		BP	F		8	19921231	\$308.45	SYS		
CTS		01		BP	V		2	19921231	\$1,368.17	SYS		
CTS		01		BP	M		7	19920630	\$88.53	SYS		
CTS		01		BP	E		6	19911231	\$153.75	SYS		
CTS		01		BP	M		6	19911231	\$91.55	SYS		
CTS		01		BP	J		1	19921231	\$287.15	SYS		
CTS		01		BP	F		9	19920831	\$121.39	SYS		
CTS		01		BP	J		2	19930430	\$54.39	SYS		
CTS		01		BP	A		6	19921231	\$212.53	SYS		
CTS		01		BP	F		7	19921231	\$53.12	SYS		
CTS		01		BP	F		2	19921231	\$65.69	SYS		
CTS		01		BP	F		7	19911231	\$60.48	SYS		

05/01/2012

1 of 1

Active Reports: Revenue Focus

http://revdev:90/lbi_apps/WFServlet

File Edit View Favorites Tools Help

★ Favorites HtmlPage

Home Feeds (1) Read Mail Print Page Safety Tools Help

Tax Type ALL Tax Year ALL

DRA Active Dashboard

Sum

Taxes paid vs Taxes due

Notes: For Amount Paid, the year is based on the deposit year. For Taxes Due, year is based on Period End Date of the tax notice.

Year	Amount Paid	Taxes Due
2008	~1,300M	~100M
2009	~1,300M	~100M
2010	~1,300M	~100M
2011	~1,300M	~100M
2012	~300M	~100M

Sum

Current Tax Notices, when they were issued.

Notes: Status = ('01','02','03','05','06','08') and no liens

Sum

Projected vs Actual Revenue by month

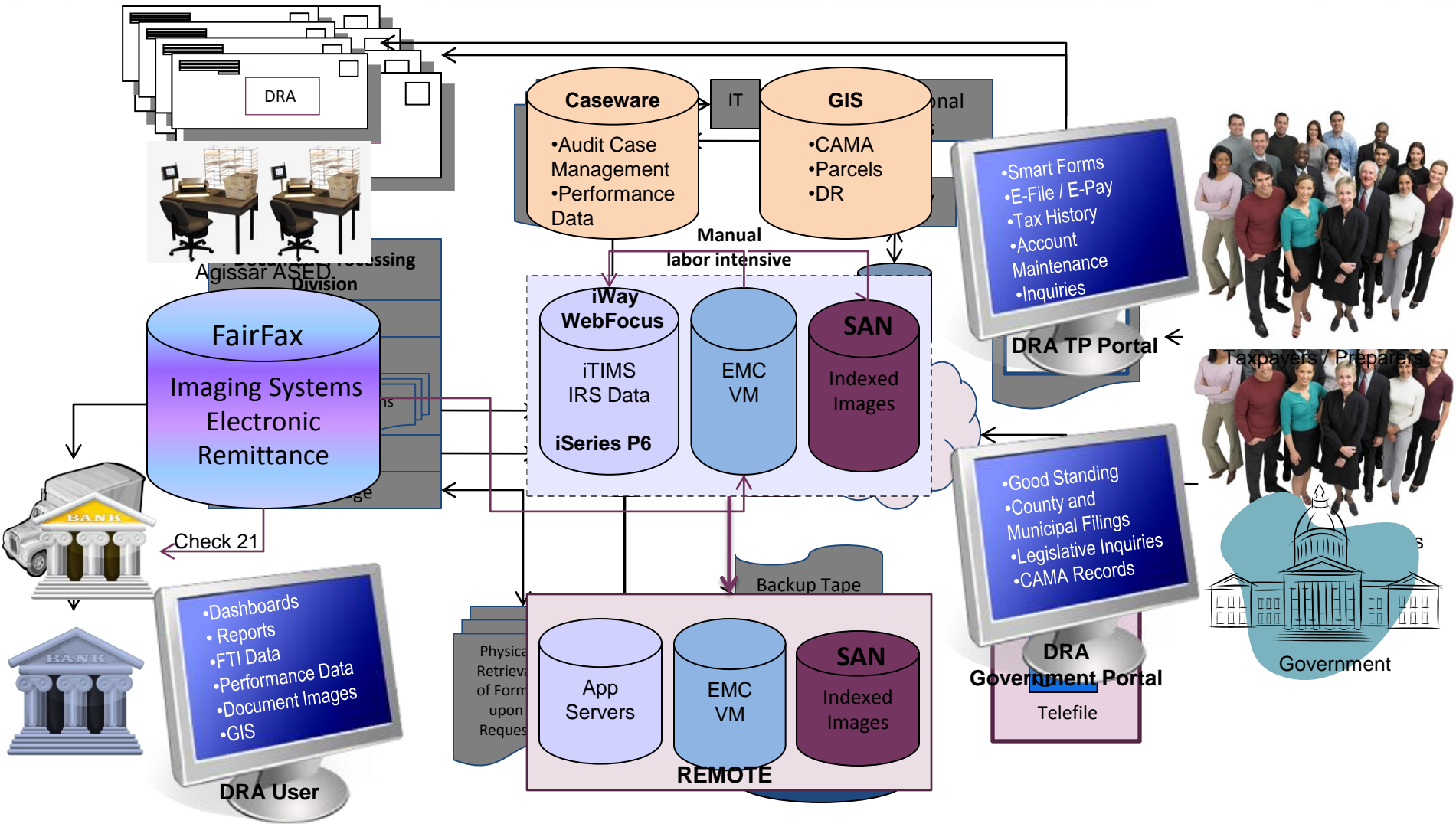
373 of 373 records, Page 1 of 54

Detailed Revenue/Tax Notice Report

Tax Year	Tax Type	Taxes Paid	# of returns	Taxes Due	# of Tax Notices	Taxes Refunded	# of Refunds
2012		\$512.03	81	\$0.00	0	\$0.00	0
2012	BP	\$16,601,873.41	355	\$208.00	1	\$10,273,477.90	2,207
2012	BS	\$196,824,530.35	3,050	\$4,568.35	6	\$582,903.18	721
2012	CS	\$33,617,932.79	115	\$0.00	0	\$0.00	0
2012	EC	\$2,455,931.64	27	\$0.00	0	\$0.00	0
2012	EX	\$50,100.00	40	\$132.00	4	\$0.00	0
2012	GW	\$340,781.18	64	\$0.00	0	\$0.00	0

Notes: For Amount Paid, the year is based on the deposit year. For Taxes Due, year is based on Period End Date of the tax notice. Refunds do not include manual refunds.

Architecture 2012



Granite to Green Status

- Upgraded to iSeries Power 6 - COMPLETE
- Upgraded to IBI WebFocus and iWay - COMPLETE
- Created Mosaic: First Sustainable Statewide GIS System – COMPLETE
- Automate Business Processes – IN PROGRESS*
- Implemented FairFax with Check 21 Deposit – COMPLETE pending backlog
- Upgraded Mail Handling and Extraction via Agissar ASER- COMPLETE
- Introduced PFM via Agissar InfoPoll/InfoPointe System – COMPLETE
- Increase Redundancy / Disaster Recovery Planning – IN PROGRESS
- Replaced Centrex with Cisco VoIP and Call Center – COMPLETE
- Migrate FTI Data – DISCOVERY
- Enable forms for E-File - COMPLETE / Participate in MeF Program - DELAYED
- Enable Credit Card / Debit Card Payment Option – Statewide RFP Pending

IT Lessons Learned

- Score Projects Consistently Prior to Launch
- Identify Logical “fit” within Program / Organization Objectives
- IT “Buy In” is Essential
- Select Partners Carefully: Universal Need to Succeed
- Include Expansive Education/Training in Purchase
- Initiate and Maintain Business User Excitement
- Recognize and Empower “emerging” Leaders
- Be Agile: Adapt to Unknown Risks



Thank You

For more information contact me at

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