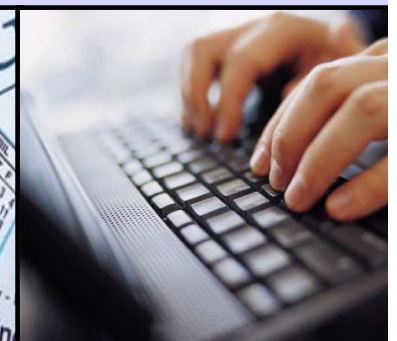




FTA Annual Meeting Technology Breakout Session

Tuesday, June 12, 2007

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Information Services Organization





Session Overview

- **Business Problem**
- **E-file Mandates**
- **Accounts**
- **Online Customer Service**
- **Benefits**
- **Items to consider**
- **Questions**



Business Problem

The Problem:

- **Reduced budgets**
- **Seasonal work force eliminated**
- **Re-deployment of business staff to assist tax processing efforts**
- **Significant savings potential in lockbox processing**
- **Shift paper processing and “float” to eFile**



Business Problem

The solution:

- **Create a web-based “self-service” portal for business taxes (WebFile for Business).**
- **If you build it they will come... not necessarily.**
- **Introduce mandates requiring business taxpayers to file and pay using the application.**
- **Provide added value – let them see views into their accounts.**
- **Do not forget to create an easy to use process for professional tax preparers.**



E-file Mandates

- **All business “Trustee” taxpayers with \$100K or more in combined tax must use WebFile for Business. In later years, we reduced this to \$10K.**
- **Bulk File withholding for payroll services, “Zero” tax returns, amendments, abatements and all new business registrations must use WebFile for Business.**
- **Additional mandates and changes followed – but these had the most significant impact.**



Accounts

- **BMA – Business Master Admin – this is the high level business account. Once approved, this account can create or eliminate additional tax accounts for that business.**
- **BTA – Business Tax Admin – this is a delegated account created by the master admin. Rights and privileges can be determined by the BMA.**
- **PTP-BMA Professional Tax Preparer (Master Admin) – This tax professional is linked by the taxpayer and can later create and assign worker accounts (with limited access) to work on the client account.**



Online Customer Service – WebFile for Business

- WFB greatly increases the ease, cost and accuracy of tax compliance.
- More than **200K** business taxpayers have registered for WFB, and now file and pay their weekly/monthly withholding and sales tax obligations electronically.
- The system processed more than \$5Billion in tax payments last year.
- The system provides taxpayers with a number of tools and information that in the past they could only get through customer service agents.



Benefits

- **Electronic collection is at an all-time high. Last year, for the first time in the agency's history, the MA DOR collected **\$18.7 billion** – **80%** of which was electronically accepted.**
- **Electronic collections have resulted in a permanent one-time acceleration of **\$2 billion** in revenues.**
- **Millions of dollars in lockbox processing fees have been eliminated annually.**



Benefits

- **With fewer workers opening mail and handling paper, the agency has been able to concentrate on better customer service and more fruitful audits.**
- **As an added dividend, the faster collection of taxes allows the agency to provide more accurate revenue forecasts to the Governor and MA Legislature throughout the year.**



Items to consider

- **Authentication**
- **Granularity of accounts and security models**
- **Mandates**
- **Provide enough time to register taxpayers**
- **Take good care of tax professionals**
- **Automate as much of the registration as you can**
- **Notify the business electronically and in writing if an account is attempted**
- **Continue to enhance and add features based on feedback**
- **Create a working DEMO**



Questions

Mass. WebFile for Business - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Mass.gov • home • online services • agencies • elected officials • help

SEARCH

Mass Dept of Revenue
WebFile for Business

I want to...

- Register
- Reset my password or have forgotten my password
- Check on my request status
- Register my new business with the Division of Unemployment Assistance
- Tour WebFile for Business
- Learn more

Welcome.
Log In or Register for a New Account

What can WebFile for Business do for you?

WebFile for Business allows you to securely:

- File returns
- Pay taxes
- Report wages
- View account history
- Research, update and maintain your registration with DOR
- And more...

Log In to the right, or
[Tour WebFile For Business!](#)

WebFile for Business - Log In

Enter your User Name and Password below.

User Name

Password

Password is case-sensitive

GET HELP

- What do I enter in the User Name and Password area?
- What do I do if I forget my password?
- What do I do if I forget my user name?
- Frequently Asked Questions
- Problems connecting to our site
- Contact DOR
- Contact DUA

▲ DUA FILERS
Deferral option is now available in WebFile for Business. You may now take the UI Contribution deferral using WFB. Please refer to the flyer included in your Form 1 mailing or call DUA at (617) 626-6325 for additional information.

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Questions

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Thank You

