



DOR Integrated Tax System Project

August 2003

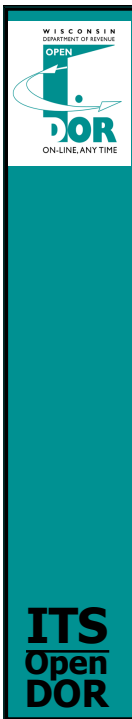
Integrated Tax is people, process, and technology functionally organized to administer taxes





DOR Integrated Tax System Project Plan

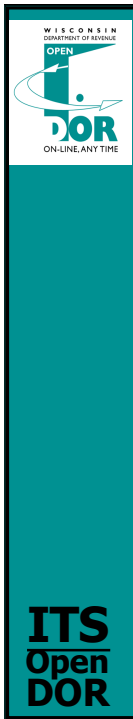
Projects Complete	PHASE 1 Master Plan, Process Analysis, Requirement Definition 1998-2001	Projects Complete	PHASE 2 System Design and Development 2001-2003	Projects Complete	PHASE 3 System Design and Development 2003-2006
<hr/>					
	Projects X Sales Internet Filing (SIP) X Scanning Upgrade X Work Plan for Phase 2 X Business Process Model X Requirements Definition X Data Warehouse Design & Development	X	Projects X Data Warehouse Development X Sales Tax Forms Redesign X ITS Release 1* X Work Plan for Phase 3 X Correspondence X Income Tax FreeFile	X	Projects X Correspondence Pilot X ITS Release 2 X Work Plan for Phase 4 X On-line Registration X Non-filer Data Matching X Standardized Technology Architecture X Development Standards
			Specific Tax System Focus Sales and Use *Components/Subsystems implemented Data Capture Channel Management Registration Returns Processing Accounting Taxpayer Revenue Case Management (Worklists) Audit		Specific Tax System Focus Individual Income Estate <i>... and then Forward!</i>



Projects Complete

PHASE 1
Master Plan, Process Analysis, Requirement Definition
1998-2001

- Projects**
- X Sales Internet Filing (SIP)
 - X Scanning Upgrade
 - X Work Plan for Phase 2
 - X Business Process Model
 - X Requirements Definition
 - X Data Warehouse Design & Development



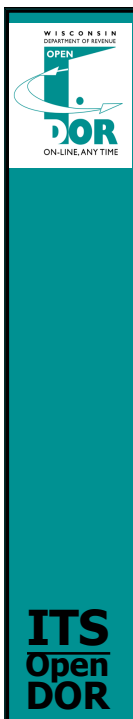
Projects Complete

**PHASE 2
System Design and
Development
2001-2003**

-
- Projects**
- X Data Warehouse Implementation
 - X State Tax Forms Redesign
 - X ITS Release 1*
 - X Work Plan for Phase 3
 - X Correspondence
 - X Income Tax FreeFile

Specific Tax System Focus
Sales and Use

- * **Components/Subsystems Implemented**
- Data Capture
 - Channel Management
 - Registration
 - Returns Processing
 - Accounting
 - Taxpayer
 - Revenue
 - Case Management (Worklists)
 - Audit



Projects Complete

**PHASE 3
System Design and
Development
2003-2006**

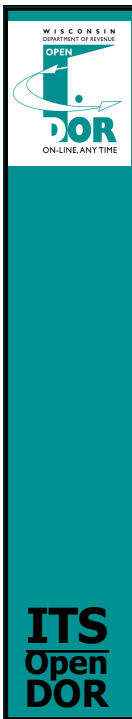
-
- Projects**
- Correspondence Pilot
 - ITS Release 2
 - Work Plan for Phase 4
 - On-line Registration
 - Non-filer Data Matching
 - Standardized Technology Architecture
 - Development Standards

Specific Tax System Focus
Individual Income
Estate



In 2002/2003 ITS brought:

- DOR's FreeFile for Individual Income Tax
- Centralized Business Tax Registration for Sales, Use, Withholding and Local Option Taxes
- A new Customer Focused Sales & Use Tax processing system
- A redesigned Sales & Use Tax Return (form ST-12)
- Redesigned billing & refund notices
- The beginning of automated Amended Sales & Use Tax Return processing.
- Improved Revenue Accounting



In 2005/2006 ITS will bring:

- A new Customer Focused Individual Income Tax system
- Internet Business Tax Registration
- Expanded E-Filing Opportunities
- Joint Reporting Withholding Tax with Unemployment Insurance Quarterly Wage Reports
- Expansion of Taxpayers Account to include Tax Preparers Identification wherever possible



Lessons Learned

- Protect Budget with results
- Change Management only resolves some of the people issues
- Need champions across the organization
- Manage expectations
- Plan for changes in administration
- User empowerment and complexity of data structure
- Staff adequately - system expertise
- Performance challenges both within ITS and support systems



Questions?



Cheryl Sullivan
WI Department of Revenue
608/261-7687
csulliva@dor.state.wi.us