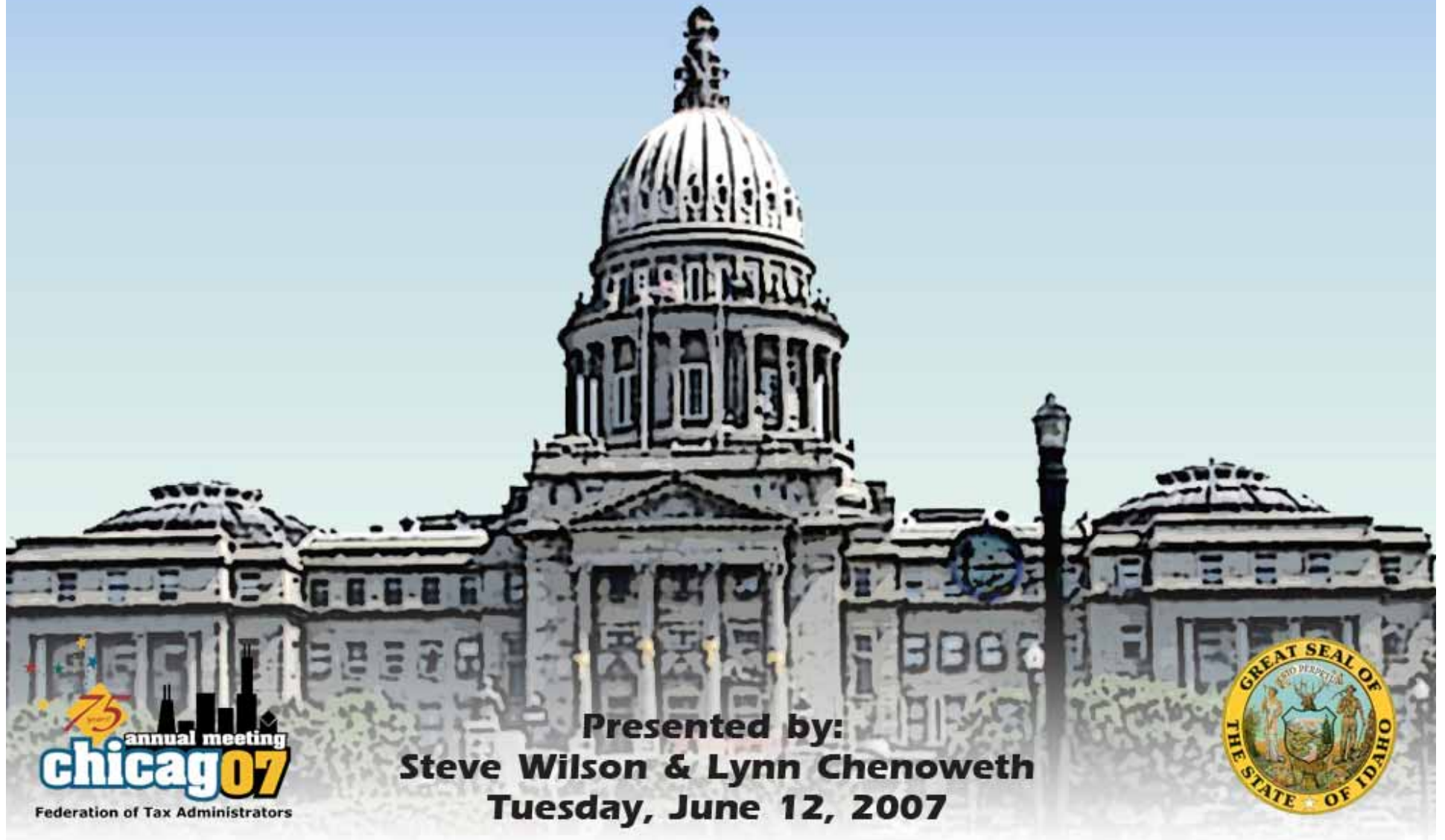


Idaho State Tax Commission Collection Stand Alone



Presented by:
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Tuesday, June 12, 2007



No Technobabble Zone



Idaho Field Collection

- Extensive field collection program for many years
- Mainframe system for financials/name/address
- Manual paper file system for collection files
- Long prep time for field visits

Idaho Field Collection



Collection System Improvements 2002

- **Integrated Tax System**
- **Online history**
- **Risk scores**
- **Document Images**
- **Still long prep time for field visits**

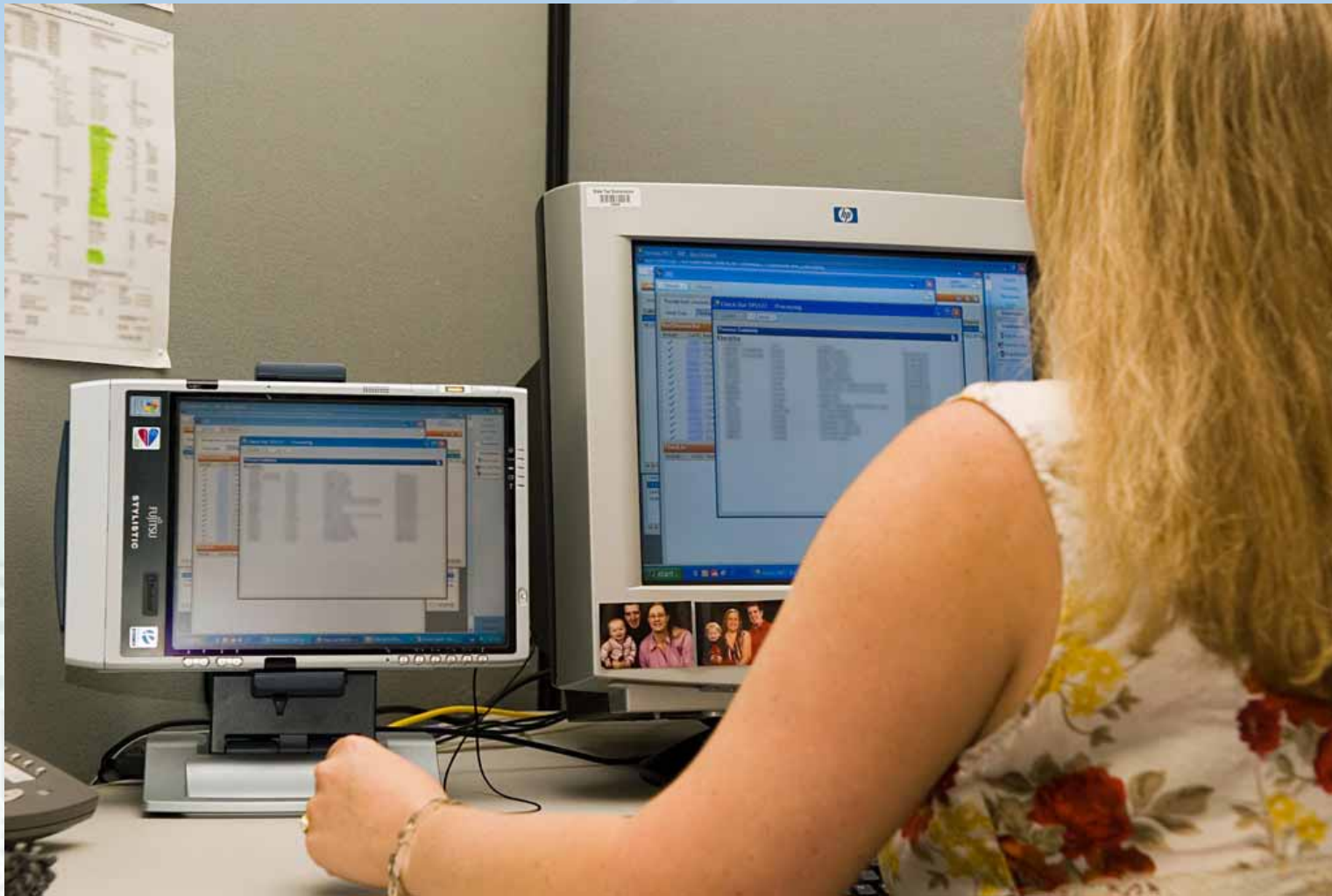
Collection System Improvements 2002



Collection Stand Alone 2006

- **What is CSA?**
 - Module within GenTax® integrated tax system
 - Tablet PC's
 - Download/upload of data
 - Security
 - Mapping Software

Collection Stand Alone 2006



Collection Stand Alone 2006

Collection Standalone

Print Directions Legend Details

Route Planner

Type place or address

Add To Route

Get Directions

- 1 800 E Park Blvd, Boise, ID 83712
- 2 #21189- JOHN PUBLIC
- 3 #21190- JOE TAXPAYER
- 4 #21193- JOHN PATRIOT
- 5 #21192- JANE DOE
- 6 #21191- GUY HUSBAND
- 800 E Park Blvd, Boise, ID 83712

Optimize Stops

More Options...

Time	Mile	Instruction	For
Summary: 28.1 miles (44 minutes)			
Highway construction information is out of date. Click this line to update.			
9:00 AM	0.0	1 Depart 800 E Park Blvd, Boise, ID 83712 on E I 0.1 mi	
9:00 AM	0.1	Turn LEFT to stay on E Park Blvd	32 yds
9:00 AM	0.1	Turn LEFT (North) onto E Morrison Knudson Plaza Dr	0.5 mi
9:01 AM	0.7	Keep STRAIGHT onto US-20 [US-26]	1.1 mi
9:03 AM	1.7	Bear LEFT (West) onto I-184 [US-20]	4.1 mi
9:08 AM	5.8	At exit 0, turn RIGHT onto Ramp	0.1 mi
9:08 AM	6.0	Take Ramp (RIGHT) onto Local road(s)	0.5 mi
9:08 AM	6.5	Merge onto I-84 [US-30]	4.7 mi
9:12 AM	11.1	At exit 44, turn RIGHT onto Ramp	0.3 mi

View Options

Road Map

By Balance

By Risk

Route Points

Points - By Name

Show Balloons / Hide Balloons

Plotted Records (5 Records)

- 1 GUY HUSBAND \$5,156.31
- 1 JANE DOE \$32,466.79
- 1 JOE TAXPAYER \$90,555.40
- 1 JOHN PATRIOT \$2,098.34
- 1 JOHN PUBLIC \$2,108.89

Collection Stand Alone 2006

The screenshot displays the 'Collection Standalone' application window. The main map area shows a green route through Boise, Idaho, with a pop-up window for '300 W MAIN ST' providing taxpayer details. The right-hand panel contains 'View Options' and a list of 'Points - By Name' with associated balances.

300 W MAIN ST
Taxpayer: JOHN PATRIOT
Balance: 2,098.34
Stage: Field Call Needed
CollectionKey: 21193
Owner: jkfarris
Risk: 10

View Options

Road Map
 By Balance
 By Risk
[Route Points](#)

Points - By Name
[Show Balloons / Hide Balloons](#)

Selected Records (4 Records)

GUY HUSBAND	\$5,156.31
JANE DOE	\$32,466.79
JOE TAXPAYER	\$90,555.40
JOHN PATRIOT	\$2,098.34

Plotted Records (5 Records)

GUY HUSBAND	\$5,156.31
JANE DOE	\$32,466.79
JOE TAXPAYER	\$90,555.40
JOHN PATRIOT	\$2,098.34
JOHN PUBLIC	\$2,108.89

Collection Stand Alone 2006



Why CSA?

- **Personal contact most effective way to close an account**
- **Significant change with potential to increase effectiveness of collection staff**
- **Leverage integrated tax system we already had**

Benefits Expected?

- More taxpayers visited with no increase in staff
- Close more cases
- Reduced A/R balance and case count
- More revenue collected

Benefits Realized

- More taxpayers visited
- Increase in closed cases
- A/R and case count continue to go down
- Increased revenue
- Less prep time
- Trip optimization
- More accurate data in the field
- White hat visits

Benefits Realized

11 Months July-May	Revenue Collected (Field Staff)	Cases Closed	Average Cost to Close Cases
FY06	\$24.4M	105,663	\$38.63
FY07	\$29.5M	115,134	\$34.47
Results	\$5.1M 21%	9472 9%	(\$4.16) (11%)

Lessons Learned

- **Business process impacts are significant**
- **Pick your tablets carefully – consider all your needs (glare, durability, weight)**
- **Get tablets to staff early – even before the CSA is available**
- **Mapping software needs to be current – frequent updates may be needed**

Lessons Learned (continued...)

- Security needs for tablets
- Pick “Super Users” carefully
- Start small
- Proper training before implementation
- Recognize there will be a level of frustration in the beginning

Next Steps

- **Printing in the field**
- **Real-time connectivity**
 - **Increased security for remote connection**



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