

Wisconsin Department of Revenue

Integrated Tax Systems *The Next Generation*

August 2002



Agenda

- The Big Picture
- Pioneering New Technology
- Empowering DOR Users & Taxpayers
- Open DOR Application
- Timeline



The Big ITS Picture

Scanning /
Imaging
Expansion

Audit
Selection

ITS

Business Tax Registration
Sales and Use Tax Processing
Revenue Accounting
Individual Income Tax

ST-12
Redesign

Delinquent
Tax System

Internet Filing
(Sales & Income)

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Pioneering New Technology

Our Current Generation

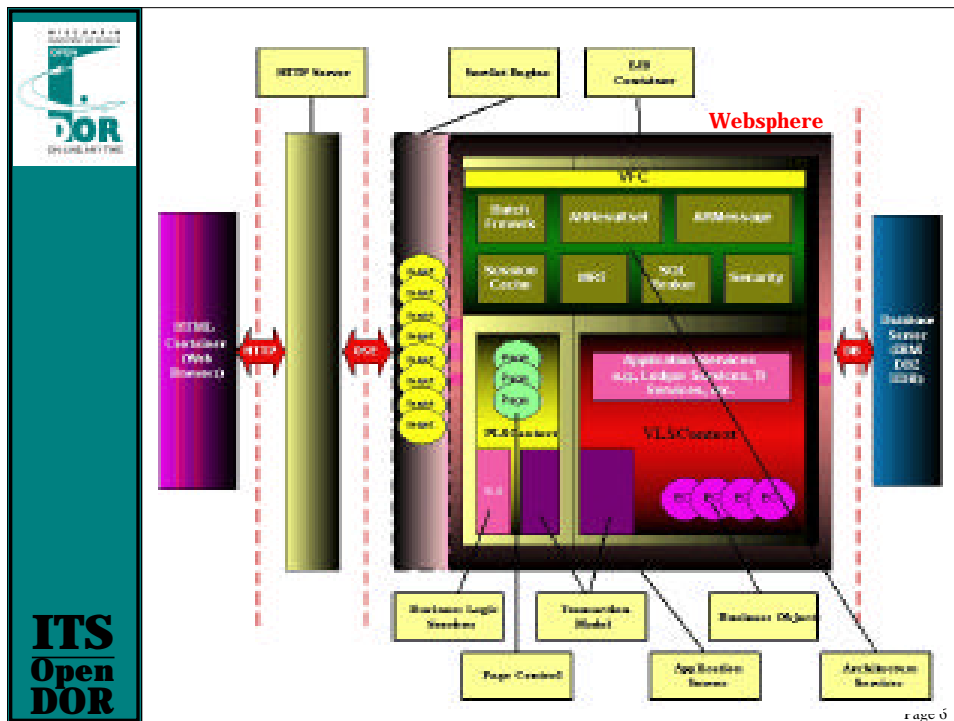
- Primarily Mainframe Environment
- Sales Tax – *IMS, DB2*
- Delinquent Tax – *Smalltalk, DB2*
- Business Tax Reg – *Microfocus Cobol, DB2*
- Withholding Tax – *CICS, DB2*
- Income Tax – *CICS, DB2, Assembler*

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Pioneering New Technology

The Next Generation

- Web client with support for IE initially
- Application Server based on IBM's Websphere
- Development Environment based on Versata
- Enterprise Java Beans
- Database Server - DB2 on Windows 2000
- Batch - JAVA with Application Server
- J2EE Compliant



Empowering DOR Users

Business Objects

Crystal Reports



General Queries
Management Reports
Image Retrieval
Notes
Correspondence

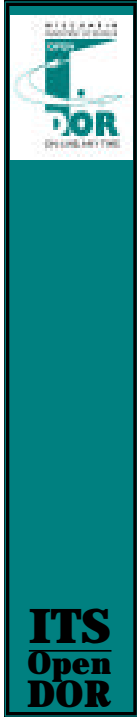
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Empowering Taxpayers

The Future Generation

- Web Enabled
- 24 / 7 Access
- Access to Account Information
- Credit Card Payment of Fees
- Sales Tax Internet Filing

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ITS Functionality

Returns Processing

- process return data
- apply form edits
- worklist returns

Taxpayer Identification

- register taxpayers
- maintain taxpayer data
- maintain contact data

Taxpayer / Account Data

Tax Account Data

Accounting Model

- translate acct activities to debit and credit entries

Revenue Accounting

- summarize / report revenue
- process journal vouchers

Taxpayer Accounting

- process TP account data
- generate billings
- calculate penalties/interest
- calculate est. assessments
- process abatements

Tax Account / Refunds

Refunds & Offsets

- generate refunds
- print refund checks
- process offsets

Workflow

- manage worklists

Correspondence, Notices, Letters



Account Information

General Information:
 ID#: 11030757
 Name: Barchester Lumber
 Tax Acct. #: 014-000607504-01
 Ownership: 0 Corporation

Tax Account:
 Total Liabilities: \$1,906.90
 Total Resources: \$1,906.90
 Balance: -\$180.00
 Status: Active

Indicators:
 Error
 Extension
 Security Risk
 Suspended

Periods	Totals	Mailing Address	Tax Type	Contact	Status	Date
10/1/2003	\$8.90		Filed		Not Filed	3/24/2004
09/1/2003	\$106.90		Filed		Not Filed	3/24/2004
08/1/2003	\$8.90		Filed		Not Filed	3/24/2004
07/1/2003	\$18.90		Filed		Not Filed	3/24/2004



Tax Period Information

General Information:
 ID#: 11030757
 Name: BARCHESTER LUMBER
 Tax Acct. #: 014-000607504-01
 Ownership: 0 Corporation

Tax Periods:
 10/1/2003
 09/1/2003
 08/1/2003
 07/1/2003

Indicators:
 Error
 Extension
 Security Risk
 Suspended

Period	Totals	Mailing Address	Tax Type	Contact	Status	Date
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07/1/2003	\$18.90		Filed		Not Filed	3/24/2004



Return Information

Wisconsin DOR - Microsoft Internet Explorer provided by AOL

WISCONSIN
Department of Revenue

SEARCH WORKLISTS REGISTRATION

Home | User Browser | Print | P&B Calculator | Collections | Help | Logout

Return > (Customer ID) > Correspondence >

Randy's Recycling > Self's Period: M7 Feb 2008 > Original Return

Return	Line Items	Jurisdictions	Adjustments	Refund Entries	
		Reported/ Employed	Adjustments	Department Calculated	Adjustment Reason
1.	Total Sales	\$18,000.00	\$0.00	\$18,000.00	
2.	Exemption Certificate	\$0.00	\$0.00	\$0.00	
3.	Exempt Property and Services	\$0.00	\$0.00	\$0.00	
4.	Excuses/Misstatements/No Sales	\$0.00	\$0.00	\$0.00	
5.	Other	\$0.00	\$0.00	\$0.00	
6.	Total (Subtotal)	\$0.00	\$0.00	\$0.00	
7.	Sales Subject To State Sales Tax	\$18,000.00	\$0.00	\$18,000.00	
8.	State Sales Tax	\$900.00	\$0.00	\$900.00	Rate 5%
10a.	Total County Sales	\$0.00	\$0.00	\$0.00	
10b.	Total County Sales Tax	\$0.00	\$0.00	\$0.00	
11a.	Local Retail Sales	\$0.00	\$0.00	\$0.00	
11b.	Local Retail Sales Tax	\$0.00	\$0.00	\$0.00	Rate 0.1%

Printable Line Items Submit Close

Request Complete Local Printout



Worklist

Wisconsin DOR - Microsoft Internet Explorer

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SEARCH WORKLISTS REGISTRATION

Home | User Browser | Print | P&B Calculator | Collections | Help | Logout

Group Worklist - Holly Deposit

Security Deposit

[Review Information](#)

[Estimated Assessment](#)
\$0.00 \$00.00

PREL

[Add/Remove Dates](#)

Submissions

[Business Rule Error Review](#)

[Customer Error Review](#)

[Invalid Customer Error](#)

[Financial Error Review](#)

[Deadlet Error Review](#)

[Consolidate Returns Review](#)

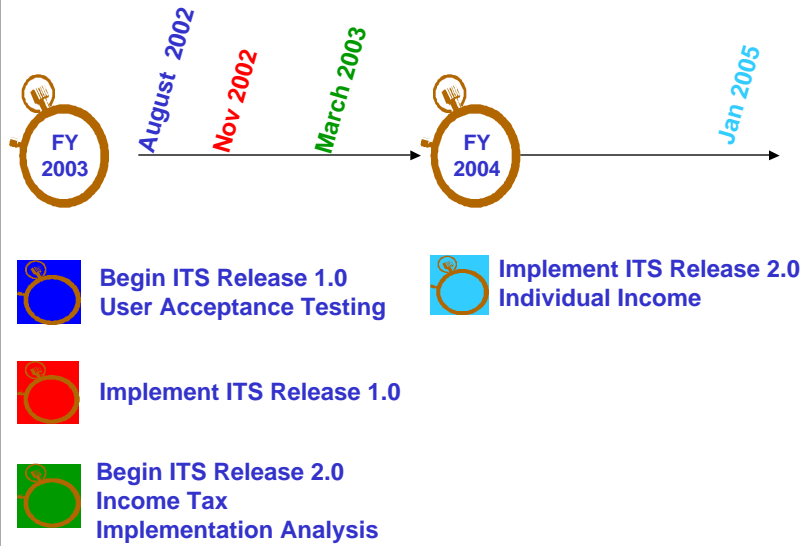
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[Missing Posting Date Documentation](#)


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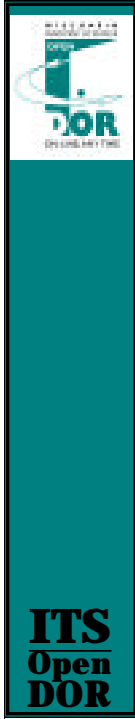
Request Complete Local Printout

Timeline



Goals

Overall Strategies	Can ITS Help?
Communication	
Education and Training	
Performance Measurement	
Information Technology	
Partnerships	
Research Customer Needs	
Management Planning	
Process Improvement	



Questions?



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