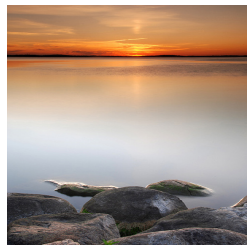
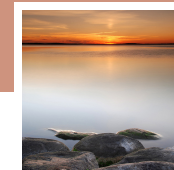


Online E-filing at Wisconsin DOR

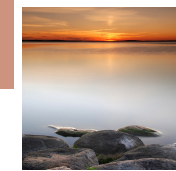


Agenda



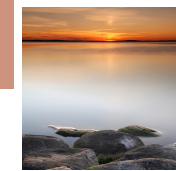
- Business Case
- Phased Approach
- Demonstration
- Infrastructure
- Staffing/Training
- Benefits/Challenges
- Next Steps

Business Case



- WI DOR had existing e-filing and Telefile systems
- Online system functioned well, but did not look like a paper form
- Goal: Enhance user experience and find tool that could support e-filing and internal processes

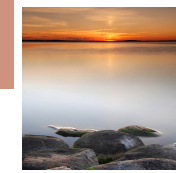
Business Case



Making E-Filing Easier

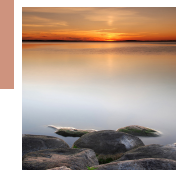
- E-forms look just like paper version
- E-forms automatically calculate totals, perform edit checks for accuracy, and allow attachments, such as Form W-2s and federal return
- Data entry is offline and a simple button-click transmits the return to WIDOR

Phased Approach



- Started with forms/schedules from existing web based filing application
- Used business rules from existing application to start
- Allowed developers to focus on new technology

Phased Approach



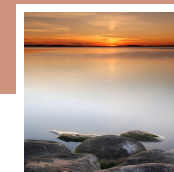
Phase 1 Implementation (Year 1)

- 3 primary individual income tax forms
- 13 supporting forms and schedules

Phase 2 Implementation (Year 2)

- Two primary individual income tax forms
- Additional supporting schedules
- Phase 1 updates

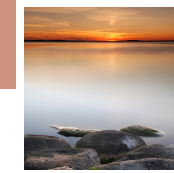
Phased Approach



Phase 1 Timeline

- September - One week training class
- September – Began development – full time commitment with overtime
- November – January – business rules, scripts and testing – full time commitment
- January 20 – Went live
- February 5 – Final version

Demonstration



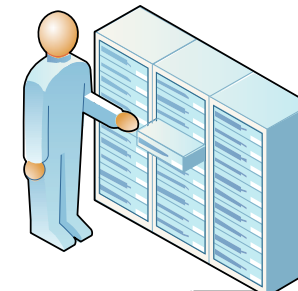
1) Users download E-Form to their PC for Data Entry

2) Users Complete their return offline.



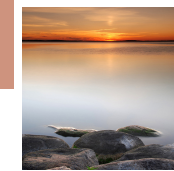
3) Users press submit to send the completed E-Form to WI DOR

4) Connection is made to WI DOR servers and data is sent for processing



Video

Demonstration



Wisconsin Form 1A (Link)

https://www2.revenue.wi.gov/Internet/wi_efile/2009/Form1A-2009.pdf

Wisconsin Form 1A
2009

WI efile
REVENUE.WI.GOV

Instructions

1. Select the forms and schedules you need by clicking or by clicking the appropriate check box(es) below.
2. Click at the bottom of this page.
3. Use your scroll bar to move from the top to bottom of each page or use your arrow keys on the tool bar to move from page to page.
4. Use at the bottom of the forms and schedules if you need to remove them. Return to this page (page 1) to or Select additional forms or schedules.
5. Complete the forms and schedules and check for accuracy.
6. Click on the last page when you are ready to file your tax return.

If the form or schedule you want is not listed below, you may need to file a Form 1 or it **may not be supported by Wisconsin e-file** at this time. If you need to file a Form 1, [click here](#) or use a [different e-filing option](#).

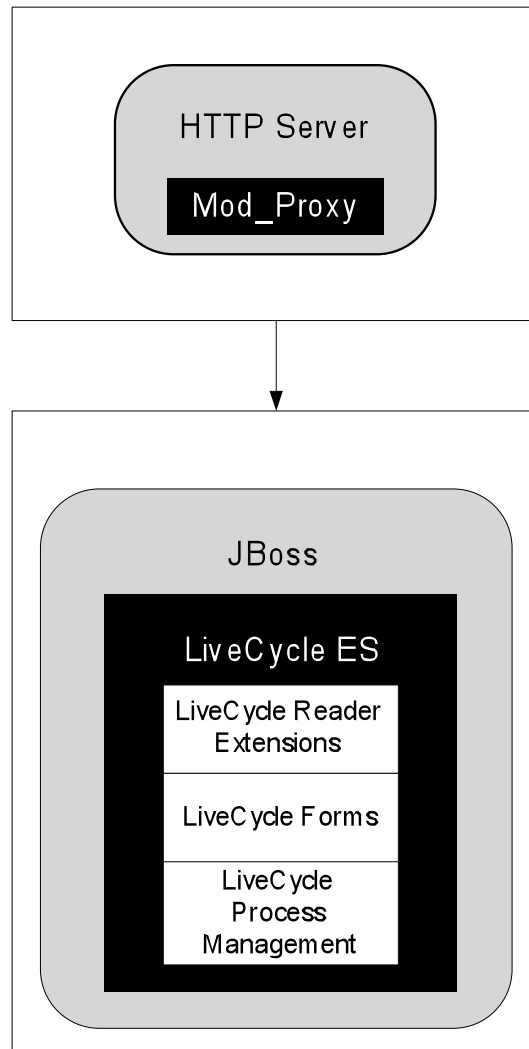
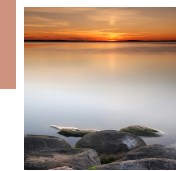
W-2.....	0	<input type="button" value="+"/>
1099-G	0	<input type="button" value="+"/>
1099-R.....	0	<input type="button" value="+"/>
EIC Worksheet.....		<input type="checkbox"/>
Schedule H		<input type="checkbox"/>
Rent Certificate	0	<input type="button" value=""/>
Property Tax Bill.....		<input type="checkbox"/>
Schedule H Notes		<input type="checkbox"/>

Revision: 17664
Version: 2010-02-18
Form: Form_1A_2009

Symbols to watch for and their meanings.

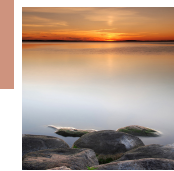
- This symbol indicates there is help available for the field. Hold the mouse pointer over the symbol to view the help message. Further information may be available if you click on this symbol.
- This symbol indicates there is something wrong with the field. Hold the mouse pointer over the symbol to view the help message to fix the error. All error messages must be fixed before you will be able to file your tax return.
- This symbol indicates there is a caution about what has been entered into the field. Hold the mouse pointer over the symbol to view the message.

Infrastructure LiveCycle ES Environment

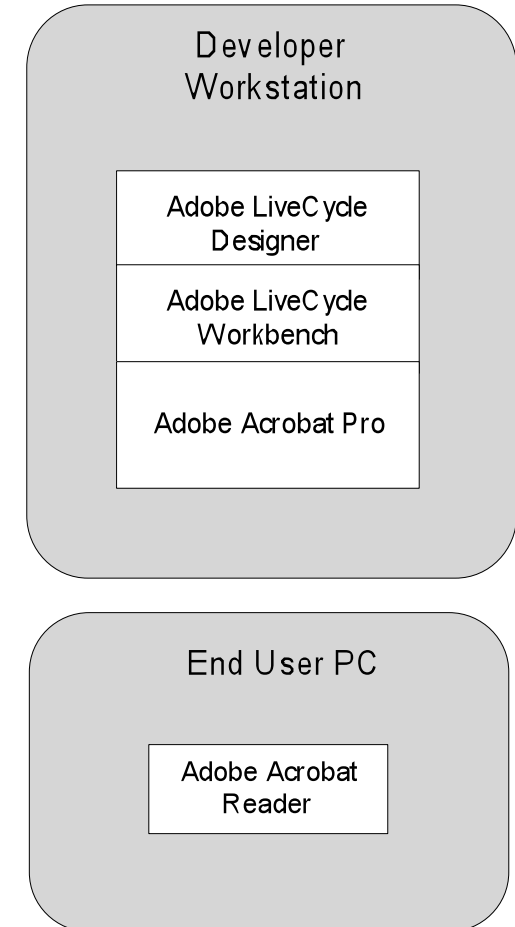


- **Reader Extensions** – Used to add DOR signature to forms, enable ability to save forms and web service calls
- **Forms** – Supports workflows for internal forms
- **Process Management** – Allows creation of workflow processes that can be run as web services

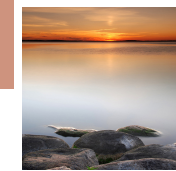
Infrastructure Development Workstations



- **Designer** – Implement forms design for the intelligent submittable forms
- **Workbench** – Design processes that handle form submission and service requests
- **Acrobat Pro** – During testing, perform web service calls without running through reader extensions first
- **Adobe Reader** – Used by taxpayers to enter data into intelligent forms

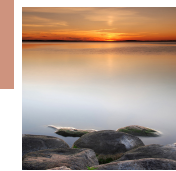


Staffing



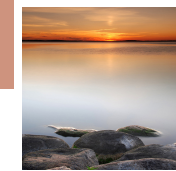
- Project manager - lead project and acted as liaison between developers and business users
- Two developers experienced in prior web filing application and one additional developer
 - ✓ Java web application development experience
 - ✓ No previous experience with Adobe e-filing technology

Staffing



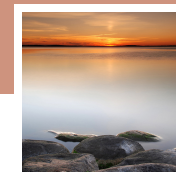
- Five analysts from business units (Audit and Customer Service)
 - Additional business rules
 - Error scripts and help information
 - Testing
- Staff were committed full time from September to mid January
- Significant overtime incurred to meet the timelines

Training



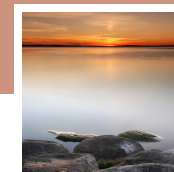
- One week on-site training in use of LiveCycle Designer and LiveCycle Workbench
- Select users not involved in development included to give understanding of the capabilities and challenges of the new technology
- One week on-site visit by contractor to help scope out approach
- One week remote support from contractors

Benefits



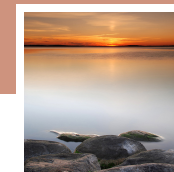
- Data easily mapped into GENTAX through a schema similar to MeF
- Ease of inserting business rules resulted in more accurate returns filed
- Developers were able to use application tools beyond what was imagined
- Eliminated need for Telefile application

Benefits



- Easy to use
- No separate charge to user
- Reduced mail since attachments could be submitted electronically with return
- User can save and come back later

Benefits

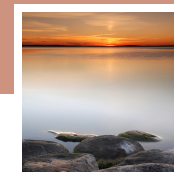


- Increased e-filing

Tax Year	FreeFile	WI - Efile
2006	99,988	n/a
2007	128,069	n/a
2008	n/a	142,668
* 2009	n/a	140,856

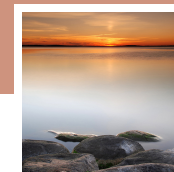
*Through 7/12/2010

Challenges



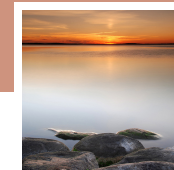
- Implemented release of forms in current Adobe version to enhance form functionality
 - Users didn't have most current version of Adobe Reader installed on computer.
 - Users wanted assistance in upgrading to the required Adobe Reader version
- Development and business resource demands increase as we expand use of application

Challenges



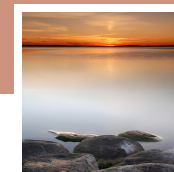
- Adobe Reader 9.2 security issues in the second year
Release activated enhanced security by default which broke communication between forms and their supporting web services
- Forms conversion from InDesign to LiveCycle required more clean-up than expected
- Does not address bulk filing or filers who want free product and data entry once for both federal and state returns

Challenges



- Additional resources for user education (save, add attachments)
- Transmissions slow or dropped
 - Dial up users
 - Attachment size limits
- Demand for new forms is greater than resources available

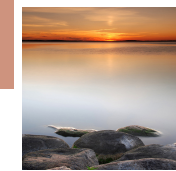
Next Steps



Phase 3 Implementation (Year 3)

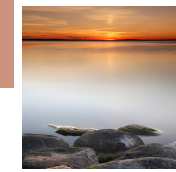
- One primary individual income tax form
- Two supporting schedules
- All cigarette and tobacco forms
- Employee travel voucher
- Phase 1 and 2 updates

Next Steps



- Add more internal and external forms and schedules
- Expand for additional tax types
- Recently hired two additional developers
- Review process for project approval

Business units submit requests; divisions prioritize projects; Division of Technology develops plan based on resources and timelines; divisions re-evaluate and finalize annual plan



Questions?