

Federation of Tax Administrators

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News Release

for immediate release

NEW YORK AND VIRGINIA CO-WINNERS OF THE FTA TAXPAYER SERVICE AND EDUCATION AWARD

(Washington , D. C., March 13, 2015) The Federation of Tax Administrators announced today that the Virginia Department of Taxation and the New York State Department of Taxation and Finance are co-winners of the 2015 FTA Award for Taxpayer Service and Education. Judges said each program had unique attractions and they equally deserved consideration as model programs.

Presentation of the awards will take place at the FTA Annual Meeting on June 16 in Minneapolis, Minn. The winners have also been invited to make a presentation on their programs during the annual meeting.

Virginia won for its Mobile Collectors Application, designed to enhance customer service through technology. Virginia's 45 field collection representatives are required to visit businesses to resolve delinquent debt cases. These are complex , often involve high dollar amounts, and sometimes payments are in cash. The agency was spending too much time on paper-related tasks to get payments deposited into the bank; posting to a taxpayer's account could take up to two weeks. The process for accepting routine sales tax payments at transient events such as the State Fair were awkward for the taxpayer.

The collectors themselves developed the idea of creating their own web application for a mobile device, then equipping the collectors with Apple iPad Air tablets. The app gives field collectors easy and real-time access to business accounts; enables the taxpayer to make payments on site by either EFT payment or credit card; and taxpayer customer accounts are quickly updated. Time-consuming paper requirements are eliminated. Now payments are posted overnight. The iPads add efficiency in other ways as well, particularly through their GPS function and Face Time option. Collectors no longer need personal mobile phones and they have easy access to work email accounts. "It is very popular," collections director Marita Winks reported, "and lends an air of professionalism to the important work our field collectors do every day."

Judges said the project showed initiative and creativity, adding, "You have to have a system that reassures taxpayers that their payments are not going

into somebody's pocket; it's good customer service. And this wasn't driven by legislation. They came up with it on their own."

New York's winning program is its Web File application and E-file Education Campaign. The agency launched an education program to inform paper return filers of the many benefits of electronic tax preparation and e-filing. The agency refined its data resources to develop a comprehensive view of taxpayer filing behavior. It then crafted highly customized messages for the different segments.

The second half of the strategy was to provide more taxpayers with the ability to electronically prepare and e-file their state returns for free. The agency developed and deployed its own Personal Income Tax Web File application.

The two efforts combined to help more paper filers discover the ease and benefits of e-filing, and take advantage of a free path to that filing. The result was a 25 percent increase in e-filing among the target population.

Judges noted that the effort "targeted that last set of filers that every state deals with, the ones you have trouble getting off of paper, and they were successful. It saves money. It's a transferable idea. And free, that is very important for taxpayer service. We like this approach. It's hard to move the dial on efile adoption."

The entries were judged by an independent panel consisting of Shirley Sicilian, KPMG; Lisa McLane, U.S. Treasury; and Doug Lindholm, Council on State Taxation.

The Federation of Tax Administrators is a nonprofit organization composed of the tax and revenue departments of the 50 states, the District of Columbia, Philadelphia and New York City. Its mission is to improve the standards and methods of tax administration.

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