Project Startup Report
Presented to the IT Committee December 10, 2013

Project Name: Taxpayer Access Point (TAP)

Agency: Office of State Tax Commissioner

Business Unit/Program Area: Business Registration and Web File

Project Sponsor: Lucas Asche

Project Manager: Brandi Fagerland

Project Description
This project will serve to replace our existing stand-alone webfile systems for sales tax and withholding tax by configuring them into the TAP system. TAP will provide taxpayers with a self-serving web application that will allow them to register their business, file and pay their taxes, and also maintain their accounts online. This application will be available to those who file and/or pay sales, city lodging, city lodging & restaurant, and/or withholding taxes. Taxpayers will be able to fill out and submit applications and other correspondence online, request permits & licenses, file their returns, upload documents and other attachments, make online payments, modify their account information, manage logins and access permissions to their accounts, view correspondence issued from our department, and also view notifications from us. TAP will be configured to utilize the North Dakota Login ID system. This will allow taxpayers to have a single sign-on user id across all state agencies. North Dakota Login IDs registered with our current sales tax and withholding tax applications will also be converted to work with the TAP system so that existing users will not have to register with the new system to start using it. TAP will provide a rich user experience by providing instant feedback to users, including instant calculations on returns and other requests currently done by mailing in paper forms. TAP also supports a large variety of new and old web browsers. This will allow our web applications to be used by a large population base with a wide variety of systems without experiencing technical issues. Since TAP is integrated into our GenTax system, our department will be able to modify and enhance the product, utilizing the same tools we currently use to configure GenTax. This robust solution ensures that we will be able to make modifications to the system in a much easier and efficient manner, continue to upgrade and enhance TAP as we upgrade GenTax, and provide a better overall experience for our taxpayers.

Business Needs and Problems

1. Improve customer service for taxpayers who file and pay withholding, sales, and restaurant & lodging taxes and expand availability of services.

   a. Tax Department staff will have sufficient knowledge to provide prompt, accurate, and courteous customer service to the taxpayer for the tax types included in this project.

   b. Streamline internal work processes

   c. Taxpayers will be able to fulfill certain requests and submit documentation without direct interaction with agency staff, allowing them to do business 24x7.

2. Utilize the full potential of our integrated tax system. Currently, all web applications are hosted by ITD and indirectly tie into Gentax, which require ITD to be involved in making changes to the applications.

   a. Eliminate the need for costly and time consuming application development services.

   b. Tax Department staff, in conjunction with vendor on-site support, will maintain and upgrade as needed to accommodate legislative and business process changes for the tax types included in this project.

Key Metrics		
Project Start Date	Project End Date	Original Baseline Budget
10/16/2013	08/31/2014	$967,085

Objectives	
Project Objectives	Measurement Description

Project Startup Report
Presented to the IT Committee December 10, 2013

Business Need/Problem 1: Improve customer service for taxpayers who file and pay withholding, sales, and restaurant & lodging taxes and expand availability of services. Objective 1.1: Increase usage of electronic services by utilizing new technology, in turn, reducing costly paper processes.	Measurement 1.1.1: Increase Webfile utilization by five percent for sales and withholding taxes within the first six months after project completion. For taxes new to Webfile, have an adoption rate of 50% in the first six months after project completion. Measurement 1.1.2: Have eighty percent of new taxpayers register online through TAP within six months of project completion. Measurement 1.1.3: Have eighty percent of new taxpayers who submit electronic applications also file/pay electronically within six months of project completion. Measurement 1.1.4: Reduce the time it takes to process applications to less than two business days within the first three months of project completion. Measurement 1.1.5: Reduce mailing costs for the associated tax types by ten percent within six months of project completion.
Business Need/Problem 2: Utilize the full potential of our integrated tax system. Objective 2.1: Eliminate the need to contract for expensive and time-sensitive application programming changes to accommodate legislative and business process changes.	Measurement 2.1.1: Eliminate ITD application programming costs for the taxes referenced in the scope of services within three months after project completion. Measurement 2.1.2: Department staff will have the knowledge to configure other applications/processes in TAP within six months after project completion.

Cost/Benefit Analysis
Anticipated Benefit(s): Reduced phone calls and paper requests, track work more efficiently, and allow staff more time to work on other revenue generating activities. We will also have additional data readily available for other tax administration purposes. Anticipated Benefit(s): Reduce the amount of time needed to fulfill taxpayer requests, as well as save money by utilizing internal IT staff, in conjunction with our vendor, make any necessary updates/changes to the system.

Key Constraints or Risks

Constraint: Fixed Project Completion Date
- o   This project has a specified project length of one year and must be completed by June 30, 2015.
- o   This is set by funding and legislatively imposed expectations.

Constraint: Limited Project Budget
- o   North Dakota Legislative Assembly approved $1.0M dollars for this project.
- o   This is a hard and fast ceiling and cannot be exceeded.

Risk: Taxpayer education/Insufficient training.

      Impact: Taxpayers may not be able access or file/pay their taxes on time. This may also lead to increased phone calls from frustrated taxpayers.

      Response: Online training will be provided, which will include videos, webinars, and documentation.

Risk: Problems with conversion of existing Webfile accounts to TAP

      Impact: Taxpayers would have to set up their accounts manually and may not have proper access to their information.

Project Startup Report
Presented to the IT Committee December 10, 2013

> Response: Ensure all existing accounts are converted properly by cross-checking data with current system data.