

Free Electronic Filing	Agency/Program #: 5801-02-11
	Division: Info. Tech. and Processing
	Program: Info. Tech. and Processing

Agency Name:	Department of Revenue	
Agency Contact:		Enter Phone #
LFC Contact:	Rep. Sesso and Rep. Taylor	
LFD Liaison:	Greg DeWitt	444-5392
OBPP Liaison:	Mark Bruno	444-4588

Program or Project Description:

Fund Name:	2008		2009		Approp & Expenditure numbers are as of October 31, 2007
	Approp.	Expended	Approp.	Expended	
General Fund					
State Special					
Federal Funds					
Total:	\$0	\$0	\$0	\$0	

Goal(s):

Provide Additional Electronic Filing Services for Montana Taxpayers

Enhance taxpayer services and compliance, increase public and private sector operating efficiencies, and provide for a more timely and accurate flow of information to policy makers by facilitating the filing of information and tax returns through increased opportunities for availability of electronic filing and electronic payment for all state taxes and fees other than property taxes. Specifically, implement the expanded fed/state e-file program for businesses; implement and expand free electronic filing opportunities; and provide taxpayers with expanded electronic payment options and file transfer services.

Performance Measures :

2009 Biennium Significant Milestones:	Completion Dates	
	Target	Actual
1		
2		
3		
4		
5		

Performance Report:**LFD Narrative:****EXECUTIVE CHANGES**

1. Changes to Goals/Initiatives: Yes The executive change was basically to the wording without changing the concept of the goal as agreed to by the working group
2. Changes to Performance Measures: Yes The measures were never agreed to by the working group, but sent to the working group after the October 2007 meeting. The latest submission of performance measures were reworded to make the milestone dates more abstract as compared to the measures sent to the working group for review after the October meeting. Changes eliminated specific milestone dates provided at the specific month, day, and year level to milestones referencing the end of a calendar year. Other than the milestone date changes, little was changed from the measures sent after the October meeting.

LFD ASSESSMENT

1. Goal is measurable within the biennium: Yes, but the measures and milestones are only that a certain element of electronic filing will be provided at the end of the project with no intermediate milestones to show progress before the end.
2. Progress toward goal: Unable to determine with the status and milestones provided.

APPROPRIATION ISSUES

1. Appropriation/Expenditures Provided: No

OPTIONS REGARDING GOAL/INITIATIVE AND PERFORMANCE MEASURES

The working group may want to request that the agency provide intermediate milestones to better enable determining progress of the project. Since this is an information technology project managed under requirements of the Montana Information Technology Act, a detailed project management plan with regular reporting is available. This plan and the project management reporting could easily be used to provide the working group with details on the project.



Version	Date	Author
AW-1	12/7/2007	DeWitt

Change Description
LFD narrative of first submission to Dec. 2007 LFC



GOVERNOR'S OFFICE OF
BUDGET AND PROGRAM PLANNING

Goals/Objectives

Complete your draft of the following information for each agency goal and related objectives. This will be reviewed by the policy and budget staff. Do not exceed two pages.

- Save the document in the Guest Directory\Performance Indicators in your agency folder, named in the following format: **aaaa.ppp.vv** Where aaaa is the agency number, ppp is a number of your choice to identify each goal, and vv is the version number. The first version should be 01, then 02, etc.
- Send your OBPP budget analyst a message when you have saved a document(s) in the file.

Agency Contact: Larry Finch / Margaret Kauska

Phone Number: 3526 / 9535

Agency Name: Department of Revenue

Division: Information Technology and Processing

Program (identify and briefly describe):

List a single goal and brief description:

Goal I: Expand Convenient and Cost-Saving Electronic Filing Services for Montana Taxpayers

Make it easier, more convenient and less costly for citizens and businesses to file and pay state taxes, increase efficiency of operations, and provide for a more timely and extensive flow of information to policy makers by expanding electronic filing and payment methods for all state taxes and fees other than property taxes. Specifically, 1) implement and expand free Internet filing opportunities; 2) implement the expanded fed/state e-file program for corporate and other business income tax returns; and 3) in selected areas, provide taxpayers with expanded electronic payment options and file transfer services.

Describe the performance measures related to this goal:

Performance in this arena is measured by meeting the due dates (milestone dates) for roll out of the initiatives listed below.

List significant milestones and target dates to be completed in the 2009 Biennium:

(A) Provide for free Internet filing of mineral royalty withholding annual reconciliation forms by end of calendar year 2008;

(B) Provide for free Internet filing of employer withholding annual reconciliation forms by end of calendar year 2008;

(C) Provide for free Internet filing of individual income tax Form 2M returns and Elderly Homeowner/Renter Credit (2EC) returns (including electronic payment and direct deposit capabilities) by end of calendar year 2008;

(D) Provide for free Internet filing of wine tax returns, and provide wine taxpayers with the ability to view their current account and previous tax return on the web by end of calendar year 2008;

(E) Provide for electronic filing of corporation license tax returns under the fed/state modernized e-file program by the end of calendar year 2008;

(F) Provide for electronic filing of returns and other information for all other tax types by mid-year 2009 except for the cases where electronic filing is identified as not being cost effective, feasible or appropriate.

Describe the current status of the measurements related to the goal:

The department has signed a contract with our vendor - FAST Enterprises - to implement the next series of e-services contemplated for our Integrated Revenue Information System (IRIS).

In moving towards implementation of the fed-state modernized e-file program, the department has completed the following technical and procedural steps that are absolute requirements for accomplishing this implementation:

- a) acquired the eXtensible Markup Language (XML) development suite needed for implementation;
- b) begun finalizing the federal government paperwork required, including the Memo of Understanding with the IRS, and the registration of our IRIS system with the IRS; and
- c) registered staff for and begun attending the required Tax Implementation Group for e-Commerce Requirements Standardization (TIGERS) meetings to facilitate implementation.