

# THE CURRENT STATE OF PROCESSING



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# PRESENTED BY

**Chris Barry, Bureau Chief**  
**Central Processing Bureau**  
**Idaho State Tax Commission**



**Paul Leiter, Director**  
**Returns Processing Operations**  
**Indiana Department of Revenue**



**Vince Panepinto, Director**  
**Revenue Processing Center**  
**Louisiana Department of Revenue**



# TEMPORARY WORKERS



How do we find  
and keep them  
through tax  
season?

Issues we've  
experienced.

# CONTROLLING WORKFLOW



There's a lot of paper!

What do we do with it all?

# ICR/OCR SOFTWARE



Challenges

Good  
experiences



# OFF-SITE LOCATIONS



Coordination

Communication

# IMAGING EQUIPMENT



Do your machines do more than just process tax returns?

# KEYING RETURNS



After scanning  
or directly into  
the processing  
software

Strategies for  
handling the  
workload



# CHECKS

Processing

Multiple  
strategies

Timelines and  
deadlines



# PEAK SEASON PRIORITIES



Making hard  
decisions

Service levels

# THANK YOU!

**Chris Barry, Bureau Chief**

**[cbarry@tax.idaho.gov](mailto:cbarry@tax.idaho.gov)**



**Paul Leiter, Director**

**[pleiter@dor.IN.gov](mailto:pleiter@dor.IN.gov)**



**Vince Panepinto, Director**

**[Vince.Panepinto@la.gov](mailto:Vince.Panepinto@la.gov)**

