

Comptroller of Maryland Lessons Learned from Modernization: Tax Type Selection Journey



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Agenda

- Introductions
- Compass Program Team
- Release Planning Considerations
- Evaluation Model
- Stakeholder Engagement



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Introductions

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THE COMPASS VISION STATEMENT



To give us a user-friendly system that provides a single-view of the taxpayer so that we can deliver better customer service to the taxpayers of Maryland.

Compass Program

In an effort to modernize technologies and support the agency's primary mission, the Comptroller of Maryland initiated the Compass Program. The program is a multi-year, multi-vendor, multi-project program whose goal is to implement an Integrated Tax System to replace all existing legacy integrated and distributed tax systems currently in use by the Comptroller of Maryland



Program Team's Focus

- Program Team at a Glance
- Awarded Vendor's Tax Release Strategy
- Legislative Impact
 - Monitor Potential Legislation
 - Influence Decision
 - Ramifications

Release Evaluation Scoring Model

Key Tasks:

- Evaluation of Tax Types/Capabilities for each Release
- Develop a Score - Value, Complexity, Low Numbers
- Analyze the Results

A	B	C	D	E	F	G	H	I	J
Tax Type	Legacy System	Legacy System Impact	COM Value/Benefits	New Business Registration Impact	Ability to Exercise System	Transaction Volume	Level of Effort (complexity of Data/Vol. of BRS/number of interfaces)	Business process complexity (temp interfaces / split processing)**	Implementation Score
Corporate Income	Name of Legacy System	2	1	2	1	2	3	2	13
Pass-Through Entity	Name of Legacy System	2	1	2	1	2	2	2	12
Motor Carrier (IFTA)	Name of Legacy System	1	1	2	1	1	3	1	10
Bay Restoration Fee	Name of Legacy System	2	3	1	3	1	1	1	12
Personal Income	Name of Legacy System	3	1	2	1	3	2	2	14
Fiduciary Income	Name of Legacy System	2	1	1	2	1	2	2	11
Estate	Name of Legacy System	1	1	1	2	1	2	1	9
Employer Withholding	Name of Legacy System	3	1	3	1	3	2	2	15
Sales and Use	Name of Legacy System	3	1	3	1	3	2	2	15
Admissions and Amusement	Name of Legacy System	2	2	3	2	1	2	2	14
Boxing and Wrestling	Name of Legacy System	2	3	1	3	1	1	1	12
Alcohol	Name of Legacy System	2	1	3	1	1	3	3	14
Tobacco	Name of Legacy System	2	1	3	1	1	3	3	14
Tire Fee	Name of Legacy System	2	2	3	2	1	2	2	14
Motor Fuel	Name of Legacy System	2	1	3	1	1	3	3	14
Environmental Surcharge	Name of Legacy System	1	2	1	3	1	1	1	10
Telecom Access Surcharge	Name of Legacy System	1	2	1	3	1	1	1	10
Transportation Network	Name of Legacy System	1	2	2	3	1	1	1	11
Abandoned Property (Unclaimed)	Name of Legacy System	2	1	1	2	2	3	1	12
Taxpayer Portal									
Data Warehouse									
Scoring Key									
		3 - High Complexity	3 - Low Value	3 - High Complexity	3 - Low Value	3 - High Complexity	3 - High Complexity	3 - High Complexity	
		2 - Medium Complexity	2 - Mid-Range Value	2 - Medium Complexity	2 - Mid-Range Value	2 - Medium Complexity	2 - Medium Complexity	2 - Medium Complexity	
		1 - Low Complexity	1 - High Value	1 - Low Complexity	1 - High Value	1 - Low Complexity	1 - Low Complexity	1 - Low Complexity	
** Business Process Complexity Examples:									
Registration (i.e. same taxpayer exists in multiple systems)									
Collections (i.e. multiple taxpayer debts in different systems)									
Combined Deposits (i.e. Splitting payments across systems)									



Release Planning Considerations

Business/Operation

- Schedule's alignment with organizational milestones
- Number of constituents effected in each release
- Effect on business units
- Minimizing risk when implementing Individuals
- Continuity of operations
- Cross-tax type processing/validations

Technical

- Vendor's ability to execute
- Legacy silos and system interoperability
- Consequences when splitting up functionality in legacy systems
- Accounting for load on technical resources by attempting to migrate resource-intensive systems as early as possible

Portal

- IFTA
- When will constituents reap the benefits
- Effects on call centers
- Load on agency's technical resources
- Risks with public-facing services



Stakeholder Engagement

- Program Oversight Committee
- Executive Steering Committee
- Division Directors

TIPS

1. Communicate Early - Leadership Team
2. Understand Pending Legislation
3. Work Closely - Contractor



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Questions?



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