



Department of Revenue

**Agency Information Technology Performance Report
2017 Biennial Report**

Please complete this report by close of business October 25, 2016.

Please upload your final Performance Report and all applicable spreadsheets to your individual Agency folder in the Biennial Reporting SharePoint Site found at:

[https://ent-sp1.mt.gov/sites/bienrpt/ layouts/15/start.aspx#/Agency%20Information/Forms/AllItems.aspx](https://ent-sp1.mt.gov/sites/bienrpt/layouts/15/start.aspx#/Agency%20Information/Forms/AllItems.aspx).

MCA [2-17-521\(4\)](#) requires the Department of Administration to prepare a biennial report on Information Technology (IT) based on the Agency IT Plans and Performance Reports required under MCA [2-17-524](#).

This performance report evaluates progress made towards the objectives articulated in your 2014 Agency IT Plan, which can be found at:

<https://ent-sp1.mt.gov/sites/bienrpt/ layouts/15/start.aspx#/Agency%20Information/Forms/AllItems.aspx>.

Please answer each section below based on your 2014 Agency IT Plan (*add lines to the tables as needed*).

Section 1: An evaluation of the Agency’s performance relating to IT (MCA [2-17-524\(3\)\(a\)](#)).

- Referencing the goals and objectives noted in Section 10 of your 2014 Agency IT plan, please fill in the table below with the information for each goal and objective.
 - 2014 Agency IT plans can be found in your Agency folder located at <https://ent-sp1.mt.gov/sites/bienrpt/ layouts/15/start.aspx#/Agency%20Information/Forms/AllItems.aspx>.
- Please provide an update on the efforts to implement your Agency 2014 IT goals and objectives. Your update may include how a goal/objective has advanced the Agency mission.

GOAL	OBJECTIVES	UPDATE
1. Collaboration and integration with the business units in identifying and implementing appropriate, efficient and cost-effective technology solutions to best meet the department’s business goals and objectives.	1. Expand and enhance e-services. 2. Expand and enhance electronic collaboration technologies to support tax administration functions of the business units. 3. Improve efficiency, service and taxpayer confidentiality through imaging and scanning technology. 4. Records and information management. 5. Property valuation system enhancement. 6. Enhance utilization of electronic compliance tools. 7. Support enterprise implementation of an identity management system. 8. Ensure SITSD (State Information Technology Services Division) sensitivity awareness and sensitivity to threat to taxpayer information confidentiality and security posed by cloud computing technology.	1. Updated TAP to accept all mobile devices. 2. Develop ability to accept W2s and 1099s when IRS opens new pipeline. 3. Upgraded to new version of IBML scanners. 4. See #3. 5. Working with vendor to enhance change and release controls. 6. Added security compliance reviews with new GenTax version. 7. Piloted FIM identity management. 8. Working with SITSD o ensure DLP when using cloud services. 9. Built and maintain the E-stop system.

	9. Develop an online registration system for businesses, licenses, fees and permits with the capability to reach out to the Internal Revenue Service and local governments that could benefit from participating in the program.	
2. Recruit, train and retain a highly skilled workforce	1. Establish a workforce development plan.	1. Career ladders have been developed for all IT staff.
3. Ensure continuity of business operations within limited resources	<ol style="list-style-type: none"> 1. Develop and implement a business continuity/resumption plan. 2. Payment processing and tax return custody services. 3. Migrate to Miles City Backup Facility. 	<ol style="list-style-type: none"> 1. Ongoing development with Citizens Services and Resource Management Division. 2. Accomplished through Memorandum of Understanding with the State of Idaho. 3. Complete

Section 2: An assessment of progress made toward implementing the Agency IT Plan (MCA [2-17-524\(3\)\(b\)](#)).

- Please detail progress made toward completing IT projects identified under section 11 of your 2014 Agency IT Plan.
 - Your Agency plan can be found in your Agency folder located at <https://ent-sp1.mt.gov/sites/bienrpt/layouts/15/start.aspx#/Agency%20Information/Forms/AllItems.aspx>.
- Please include project cost, schedule and completion information.

ITEM	DESCRIPTION	ACTUAL AS OF JUNE 30, 2016
Project Name	GenTax System Upgrade	
Agency / Division	Department of Revenue	
Project / Program purpose and objectives	<ul style="list-style-type: none"> • Leverage advantages in the upgrade to increase efficiency and effectiveness of tax administration. • Transition to a browser based application architecture in order to reduce maintenance of software and increase flexibility. • Improved task and workflow management, including the ability to access more detailed information quickly. • Align with GenTax version used by DLI's Status, Tax Accounting, Audit & Rating System (STAARS) in order to allow for improved cross agency support. 	
Estimated start date	7/1/2015	N/A
Estimated cost	\$2,675,000	N/A
Funding source – 1	HB10 (proposed)	N/A
Funding source – 2	N/A	N/A
Funding source – 3	N/A	N/A
Annual costs upon completion	No additional costs, existing maintenance agreement in place.	No additional costs, existing maintenance agreement in place.
Status of the project as of June 30, 2016. Indicate % completed and status of funds expended.	This project was not funded by HB10 as originally proposed. The department was able to begin the project in March 2016 with an expected completion date of January 2017.	

Section 3: An inventory of agency information services, equipment and proprietary software (MCA [2-17-524\(3\)\(c\)](#)).

To collect data on “information services” and “proprietary software”, we are leveraging LDRPS (L10). Our goal is to utilize and maintain LDRPS as the authoritative source for this information.

- Please verify the information in the LDRPS Spreadsheet, making any necessary updates or additions.
- Please email your updated spreadsheet to Dawn Pizzini, subject matter expert, at dpizzini@mt.gov.
 - The LDRPS spreadsheet can be found in your Agency folder located at <https://ent-sp1.mt.gov/sites/bienrpt/layouts/15/start.aspx#/Agency%20Information/Forms/AllItems.aspx>.
 - We will pull a final LDRPS Spreadsheet for submission as part of the Biennial Report based on your Agency’s input.

For “equipment”, we are utilizing the standard Agency Inventory Template Spreadsheet we have used for past biennial reporting and that we are currently using to gather information for the IT Convergence project. The spreadsheet can be found in your Agency folder located at <https://ent-sp1.mt.gov/sites/bienrpt/layouts/15/start.aspx#/Agency%20Information/Forms/AllItems.aspx>.

- If you **have** already provided your inventory for the IT Convergence project, please fill out the last tab labeled **DEVICES**.
 - Please review the entire workbook for accuracy and make any necessary changes.
- If you **have not** provided this inventory, please fill out the entire workbook.

Questions can be directed to:

Jennifer Schofield
jschofield@mt.gov
406.444.2926

Amber Conger
aconger@mt.gov
406.444.5764

Please complete this report by close of business **October 25, 2016**.

Please upload your final Performance Report and all applicable spreadsheets to your individual Agency folder in the Biennial Reporting SharePoint Site found at:

<https://ent-sp1.mt.gov/sites/bienrpt/layouts/15/start.aspx#/Agency%20Information/Forms/AllItems.aspx>