

Information Technology Capital Investment Program  
Project Status Report

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**To:** Information Technology Strategy and Investment Committee  
John Vittner, Office of Policy and Management

**From:** Phil Soucy

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**Agency:** Department of Revenue Services

**Project:** IT/CTAX Modernization

**Project Manager:** Phil Soucy

**Reporting Period:** Project Inception through 12/31/2019

**Total Funds Requested:** \$53,000,000

**Total Funds Allotted to Agency:** \$25,100,000

**Accumulative Total Capital Fund Expenditures to Date:** \$11,745,593

**Brief Project Description/Summary:**

DRS has decided to partner with FAST Enterprises in implementing GenTax to replace ITAS as our tax management system. GenTax is a COTS software developed specifically for the administration of tax, returns, and licensing programs. This new tax management system will provide taxpayers with a more timely, informative, and communicative experience. It will also provide DRS personnel with a dynamic platform for workflow, automation, reporting, and management capacities that support return processing, collections, audit, and other DRS processes.

Scheduling of this upgrade consists of a 48-month implementation of GenTax through four rollouts. The Major Tax types will be spread across the 48-month implementation schedule. Beginning with Sales Tax and Withholding (Rollout 1 – 12 Month Duration), then Business taxes and Motor Fuel (Rollout 2 – 14 Month Duration), followed closely by Individual and Real-Estate (Rollout 3 – 12 Month Duration), and concluded by Controlled Substances taxes (Rollout 4 – 10 Month Duration).

**Summary of Progress Achieved to Date:**

As of 12/31/2018

- Completed the Base Configuration phase – this phase serves as a checkpoint to confirm definition and developer are heading the right direction
- Completed the Definition phase where business requirements were gathered for rollout 1 tax types
- Continued conversion definition and started mock conversion runs
- Development phase is almost over, over 90% of development is done
- Started the Testing phase, currently halfway through business testing
- Training plan has been finalized and includes 4 Tiers of training, the first tier (CBTs) have been released to all applicable users and completed in preparation for Tier 2 classroom training which started on Jan 27th.
- Started cutover planning to prepare for the migration of rollout 1 taxes from ITAS to CTax for the May 11th rollout date
- Started change management and external communication efforts

**Issues and Risks:**

As of 12/31/2018

**Risks**

- Over 30% of the agency is expected to retire in 2022. While this doesn't pose a risk for rollout 1, this needs to be kept in mind when moving forward with the project.
- Tax Type agency resources availability is limited during all phases of the project due to operational and other agency project commitments.
- Development changes due to Legislative/annual implementations may cause resources to be stretched too thin at times.
- The agency is responsible for making the necessary changes in the legacy systems to protect data integrity once the conversion extract starts. If not done properly, data integrity issues can put the whole agency at risk.

**Next Steps & Project Milestones:**

As of 12/31/2019

Details for Rollout 1

- Complete development
- Complete testing
- Complete all 4 tiers of training
- Complete cutover planning
- Complete change management and external communication efforts
- Go live with rollout 1 taxes May 11th
- Complete conversion

In addition, start planning resources and scope (tax types) for rollout 2