

The Department of Revenue continues to strive for improvements across the board of its operations. From training to customer service to electronic filing to revenue collections, the Department has continually sought out new and better ways to provide Quality That Counts in all it does. Below is a snapshot of some of the key Department accomplishments from FY 2009:

- **Collections** – The Department continues to make strides in collecting delinquent taxes. The monthly billing process that was implemented in FY 2007, along with the monthly issuing of best-information-available (BIA) billings for non-filers and collections through the requirements for the registered retail-merchant certificate (RRMC) have all aggregately contributed to a higher level of revenue collection in FY 2008. For example trust-tax collections exceeded \$188 million, in FY 2009, compared with \$118 million in FY 2008, and \$100 million in FY 2007. As part of that FY 2009 collection total, BIA billings gleaned more than \$7.2 million in FY 2009, and the RRMC initiative brought in another \$5.8 million. The Department believes that its standard monthly billing process is reaping results by garnering better compliance on the front end of the collection process, and reducing the number of BIA- and RRMC-related billings.
- **Customer Service** – Reallocation and realignment of staff, combined with improved training and job education, has helped the Department become more proficient in resolving taxpayer questions and concerns, and in a more timely manner. In FY 2009, representatives from the Department’s incoming call center handled more than 358,000 taxpayer phone calls in which 73 percent were answered within two minutes. This is an improvement over FY 2008, in which Department representatives answered more than 351,000 taxpayer calls, with only 63 percent answered within two minutes. In all, Department representatives answered 2-percent more calls in FY 2009 than in FY 2008 and improved its response time by 16 percent, compared with FY 2008. In addition, the Department has improved its customer service by digitally imaging tax returns (see p.8), allowing staff to respond more quickly to taxpayer concerns. Additionally, the Department has enhanced its automated telephone line, which is a self-help tool that allows taxpayers to pay taxes due; check the status of their current-year refund; find the current balance due on an outstanding liability, case, and/or warrant with the daily interest accrual noted; and hear about “hot” tax-related topics.
- **Electronic Filing** – More than 1.9 million Hoosier taxpayers used some form of electronic filing (e-File or I-File) to file their 2008 state and federal individual income tax returns. This amounts to a 5-percent increase over the same time last year. Electronic filing provides Indiana taxpayers the opportunity to file their federal and state tax returns immediately and receive their Indiana refunds in about half the time it takes to process a paper return. Even if an amount is due on either return, Indiana taxpayers can still file electronically and feel comfortable knowing that the returns were received nearly instantly by the Internal Revenue Service (IRS) and the Department.
- **I-File** – More than 150,000 Hoosiers used I-File to file their 2008 state tax returns, an increase of nearly 30 percent over the same time last year. This fast, friendly and free electronic program allows taxpayers to prepare and file their Indiana tax returns online. This program is available to both individual taxpayers and preparers. A user friendly program, I-File features a question-and-answer format with help links to guide users through filing. For more information and to take advantage of this free service, taxpayers can go to [www.ifile.in.gov](http://www.ifile.in.gov)
- **INTax** – When 93 percent of INTax users are satisfied with the online program, it is not a surprise that this online tool has gained popularity over the years. Increased taxpayer activity and the addition of features to file and pay special taxes, such as Type II Gaming, have driven payments up to \$2.1 billion in FY 2009, versus \$1.2 billion in FY 2008 and \$663 million in FY 2007. For more information, visit [www.intax.in.gov](http://www.intax.in.gov)
- **Training** – In FY 2009, development and delivery of frontline training materials continued to expand through the agency. Additionally, the entire middle management team (34 employees) received training modules focused on coaching and goal-setting issues to help them and the supervisors reporting to them become more effective leaders. Also, online computer-based training was developed and introduced in 2009 for use with agency-wide training on policies in addition to basic competency training of supervisory skills. And, by the end of FY 2009 approximately 50 percent of the Department’s frontline employees had received customized, job-specific training on customer service processes developed to deliver outstanding service to taxpayers and other groups with which the Department works.

- **Taxpayer Feedback** – In FY 2009, the Department collected feedback from more than 4,000 taxpayers via surveys and education forums. This feedback has contributed to improvements throughout the Department, from the New and Small Business Center to Motor Carrier Services operations to INtax to I-File to the customer call center and district offices.
- **Protests/Appeals** – The Department’s legal division continues to make headway in quickly resolving protest/appeals and inheritance tax audits. In FY 2009, the legal division set a goal to close 698 protest/appeal cases. In actuality, the division closed more than 850.
- **New and Small Business Education Center** – Launched in November 2008, the Indiana Department of Revenue’s New and Small Business Education Center has received more than 29,000 visitors and has had more than 500 regular subscribers since it went live. This new site offers new and small business owners a full range of resources – from videos, to podcasts, to downloadable forms, to frequently asked questions – to help them properly file their Indiana business taxes, as well as how to register and close a business with the Department of Revenue. A recent survey of subscribers to the new site revealed that 77 percent of respondents found the site valuable, and 85 percent would recommend it to a business colleague. To visit the New and Small Business Education Center, visit [www.smallbiz.in.gov](http://www.smallbiz.in.gov)
- **Latino Outreach** – The Department has been working diligently to enhance its Latino outreach initiative in an effort to better educate the permanent and immigrant Latino community in Indiana. This educational effort has included identifying and building relationships with multiple Latino outreach organizations throughout Indiana, actively participating in speaking engagements, hosting a Spanish-language Web site ([www.impuestos.in.gov](http://www.impuestos.in.gov)), hosting a Spanish-language tax blog, writing articles for Spanish publications throughout the state, translating forms and tax booklets into Spanish and providing bilingual staff to assist Spanish-speaking taxpayers. The efforts over the last year have increased traffic to the Spanish Web site and almost doubled the amount of phone calls into the Spanish line.
- **Imaging** – Beginning January 2009, the Department began to use imaging technology to extract information from tax returns. In all, more than 1.1 million individual income-tax forms and 2.5 million withholding forms were processed through the imaging system since its launch. Installing paper-imaging technology to capture, digitize and integrate data will allow the Department to process and correct suspended returns much more quickly, as well as greatly reduce keypunch errors. The imaging system will improve compliance not just by scanning the returns but by scanning taxpayer paperwork submitted with a specific return, payments and envelopes. In addition, this system will allow the Department to set the groundwork for comparing employer information against individual information for further compliance efforts. During tax season’s peak, the imaging system processed nearly 30,000 forms of all types every 24 hours. For the first time, the Department was able to collect county data from an estimated 1.2 million WH-1s, which will provide more accurate revenue information for county taxes. Sales tax, food-and-beverage tax and other forms are planned to be imaged in the near future. With imaging underway, the Department is poised to better serve the State of Indiana for years to come.

## What Indiana Taxpayers Have To Say

### **New and Small Business Education Center**

*“Thank you so much for launching this site. As a small business, we so appreciate any help we can get without spending money at this difficult time. So once again, thank you.”*

**C. Hubbard**