



# Missouri Department of Revenue

Metrics in Motion

August 7, 2018



# Road to 100% Project

- **Our Goal**
  - Answer 100% of Incoming Calls



- **Our Goal**
  - Answer 100% of Incoming Calls
- **Result**
  - This drives every action we take



# 1. Capital Investments

a) Why are people calling?



# 1. Capital Investments

a) Why are people calling?

Anecdotes → Data Points



# 1. Capital Investments

Ready Idle PD Mode Volume

Answer End

Current Contact Contact

Appearance Str  
In Bound Co

Quick Contact List Spe

Account Overview - I  
Account Informatio  
Account ID  
Contact Name  
Contact Phone  
Company Name  
Identity Verified  
Call Type  
Call Resolution  
Resolved

- MAKE SELECTION  
0 - Voucher Reprint  
0- MO Tax ID - PIN  
0-Disconnect/dropped  
0-Power of Attorney  
0-Trsf to Dif Agency  
00-1099-G  
00-1099-G Copy  
00-1099-G Why Rcvd  
c-Corporate Bal Due  
g-Garnishment  
g-General Info/Other  
g-General Lien  
g-General Revocation  
h- HB600 StEmpProLic  
h1-Compliance Ltr  
h2-File or set upPPA  
h3-New State Emp  
i- ID Theft ntifyDOR  
i- Indiv Debt Offset  
i- Indiv Forms  
i- Indiv Ntce of Adj  
i- Indiv Ref Status  
i- Recv Email/Text  
i- Used Tracker 1st  
**i- Website Confusing**  
ib-1 Indiv Bal Due  
ib-Fail to File/Pay  
ib-Indiv GLR/Payoff  
ib-b 2210 Penalty

- MAKE SELECTION

00 Make a Selection

[Go to Search](#)



# 1. Capital Investments

## b) Reports



Call Topics -  
Dashboard



# 1. Capital Investments

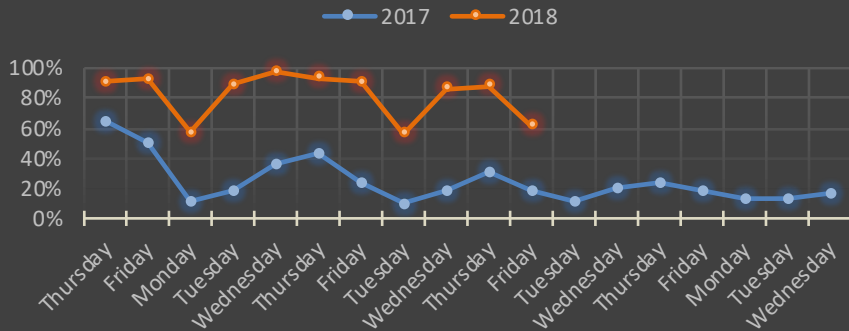
	Monday		Tuesday		Wednesday		Thursday	
<b>Top Topics</b>			INDIVIDUAL REFUND STATUS		INDIVIDUAL REFUND STATUS		INDIVIDUAL REFUND STATUS	
			SALES USE GENERAL		INDIVIDUAL BALANCE DUE		INDIVIDUAL BALANCE DUE	
			INDIVIDUAL BALANCE DUE		PTC REFUND STATUS		PTC REFUND STATUS	
<b>CY Working Days</b>			8		9		10	
<b>February</b>	2/13/2017	2/12/2018	2/14/2017	2/13/2018	2/15/2017	2/14/2018	2/16/2017	2/15/2018
<b>Del Call Center</b>	HOLIDAY	HOLIDAY						
Total Contacts			4,235	2,290	3,059	1,344	1,840	1,187
% Abandoned			25.4%	27.8%	27.0%	10.8%	34.8%	8.0%
% Deflected			53.8%	8.9%	42.4%	0.6%	14.2%	0.5%
% Answered			20.9%	63.3%	30.7%	88.6%	51.0%	91.5%
<b>Non Del Call Center</b>	HOLIDAY	HOLIDAY						
Total Contacts			4,134	2,266	3,323	1,306	2,139	1,175
% Abandoned			27.0%	32.2%	25.0%	11.2%	26.7%	8.8%
% Deflected			62.8%	11.7%	56.8%	2.6%	41.7%	2.7%
% Answered			10.2%	56.0%	18.3%	86.2%	31.5%	88.5%





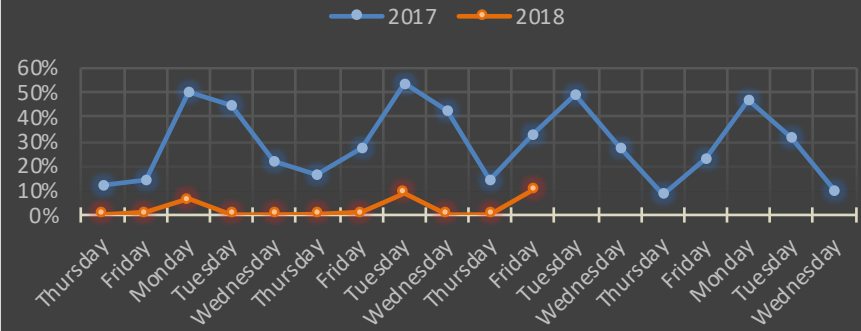
# 1. Capital Investments

**% Answered  
Non Delinquent Call Center**



Feb 2018 and PY Equivalent

**% Deflected  
Delinquent Call Center**



Feb 2018 and PY Equivalent

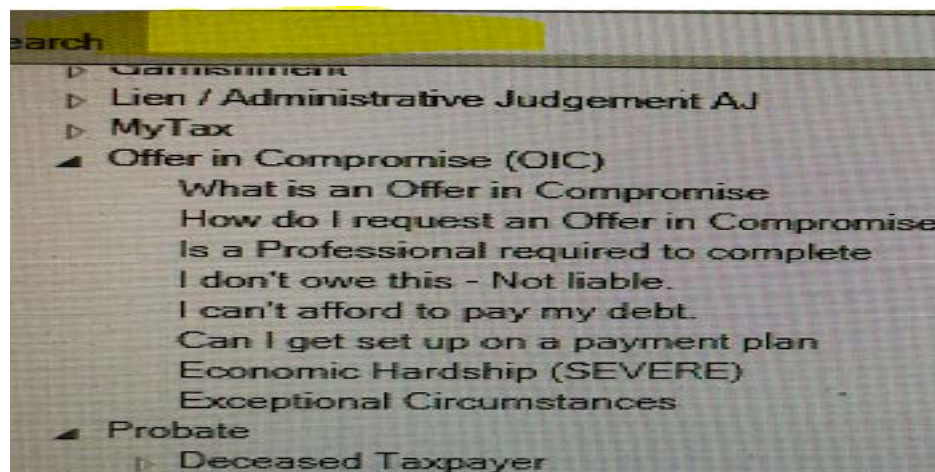
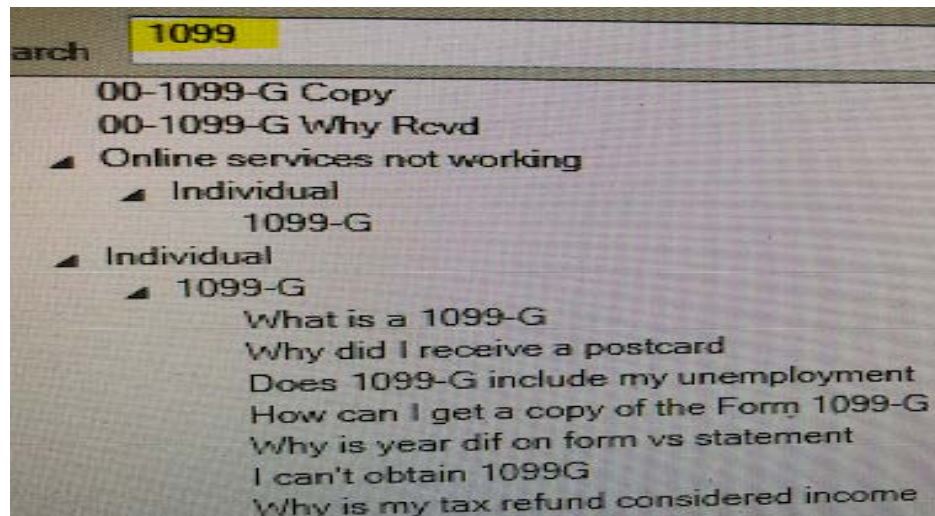


# 1. Capital Investments

## c) Tiers and Scripts



# 1. Capital Investments





# 1. Capital Investments

## d) Action

- 1) Pizza Tracker



# 1. Capital Investments

## Current Return Inquiry Message

1. Received your return ✓

2. Validating your return

The information reported on your return, such as income, deductions, and payments, is being verified for accuracy. This validation process generally requires **six weeks** from the date your return was received.

3. Processing your return

The Department refreshes the data on this application daily, usually overnight. However, during heavy processing periods, the status of your return may not change from day to day.

4. Completed your return

## Previous Return Inquiry Message

Your tax return has been received; but not processed. The status information is updated daily, please allow at least 24 hours before checking again.



# 1. Capital Investments

## d) Action

- 1) Pizza Tracker
- 2) Notice Clarity



# 1. Capital Investments

## Current Language for Payment Options:

Send your check or money order to the Missouri Department of Revenue at the above address. You may also pay by Electronic Bank Draft (E-Check); charge the balance due to MasterCard, Discover, American Express or Visa by calling toll-free [Pay Phone = 888-929-0513]; or pay online at [PayBusinessOnlineUrl or IndividualUrl]. A convenience fee will be charged to your account for processing. Additional information on convenience fees may be found on the pay online website.



# 1. Capital Investments

## SELF-SERVICE PAYMENT OPTIONS:



**Quickest and Easiest Method - Credit Card or Electronic Bank Draft (e-check):** To pay by credit card or electronic bank draft, visit [[PayBusinessOnlineUrl](#) or [Individual Url](#)], or call [Pay Phone = 888-929-0513]. Convenience fee will apply for processing.



**Check or Money order:** To pay by check or money order (payable to the Missouri Department of Revenue), send your payment with the detachable portion, below, to the above address. If you pay by check, you authorize the Department to process the check electronically. Any returned check may be processed again electronically until payment clears.



**[For Individual Tax] Installment Pay Plan Agreement:** If you cannot pay the full amount immediately you may qualify for an installment agreement online. To determine if you are eligible for an installment agreement, visit [[INDIVIDUAL URL](#)]. You will need your personalized PIN above.



**[For Business Tax] Installment Pay Plan Agreement:** If you cannot pay the full amount immediately you may qualify for an installment agreement online. Installment agreements allow for the full payment of the tax debt over a period of time. To find out more, visit [[BUSINESS URL](#)]. You will need your personalized PIN above.





# 1. Capital Investments

## d) Action

- 1) Pizza Tracker
- 2) Notice Clarity
- 3) Revised FAQs



# 1. Capital Investments

## Current Notice Information

This notice is sent if the Department has received a return without payment in full, if calculation errors were made on a return, or if the return is not received by the due date. The notice will indicate the current balance due on the tax period.

## Revised Notice Information

### **Understanding Your Notice**

You received this notice because:

- The Department received a return indicating a balance due.
- The Department did not receive a payment in full.

### **Resolving Your Notice**

You may resolve this notice by paying the balance in full. Paying the balance due before the due date will avoid additions and interest charges to your account. You can:

- **Pay the amount due.** Send a check or money order, made payable to the Department of Revenue to the address listed on the notice. You can also pay the amount due **online** via electronic funds transfer from your bank account. The Department also accepts Mastercard, Visa, Discover, and American Express. Call toll free (888) 296-6509. There will be a convenience fee charged to your account for processing.
- **Submit a proposed installment** agreement to pay the full amount within one year. To request an installment agreement, access our website at <http://dor.mo.gov/cacs/>.

### **If you do not pay in full:**

- You will be charged additions to tax and interest on any balance remaining after the due date until fully paid;
- The Department will issue a Notice of Deficiency; and
- Further collection actions will occur on the balance remaining, the additions to tax and the accumulated interest.



## 2. Workforce Investments

a) What does excellence look like?





## 2. Workforce Investments

### b) Accountability



# 2. Workforce Investments

## b) Accountability

### 1) Dashboard – Individual



Employee  
Dashboard



## 2. Workforce Investments

### b) Accountability

- 1) Dashboard – Individual
- 2) ENGAGE



# 2. Workforce Investments

State of Missouri  
**ENGAGE**

[MO.gov](#) [Governor Parson](#) [Find an Agency](#) [Online Services](#) [Better Government](#)

## **ENGAGE: IT'S ABOUT PEOPLE, NOT PROCESS**



**THE CASE  
FOR CHANGE**



**WHERE WE  
ARE GOING**



**HOW TO ENGAGE**

We've heard from you that the annual review process doesn't help you do your jobs better or develop professionally. You want your leaders to engage with you about your development regularly, not once a year. You want an approach focused on people, not process.

That's why we have stopped using PERforM.

In its place, we are going back to the basics. For starters, we are asking managers and team members to have regular conversations about what's working well, and what could be done better.

On this website you will find videos, guides, and other resources to help you understand our new approach, called ENGAGE. We encourage you to check back regularly to see what's new – especially before your next development conversation with your supervisor.


We want your feedback on what is working with ENGAGE and what we can do better. Please let us know what you think by completing our [feedback form](#).

### Resources

[Guide for Team Members](#) 

[Guide for Supervisors](#) 

[Conversation Starters](#) 

[Detailed FAQs - UPDATED](#) 

[Pocket Guide](#) 

[Leadership Library](#)





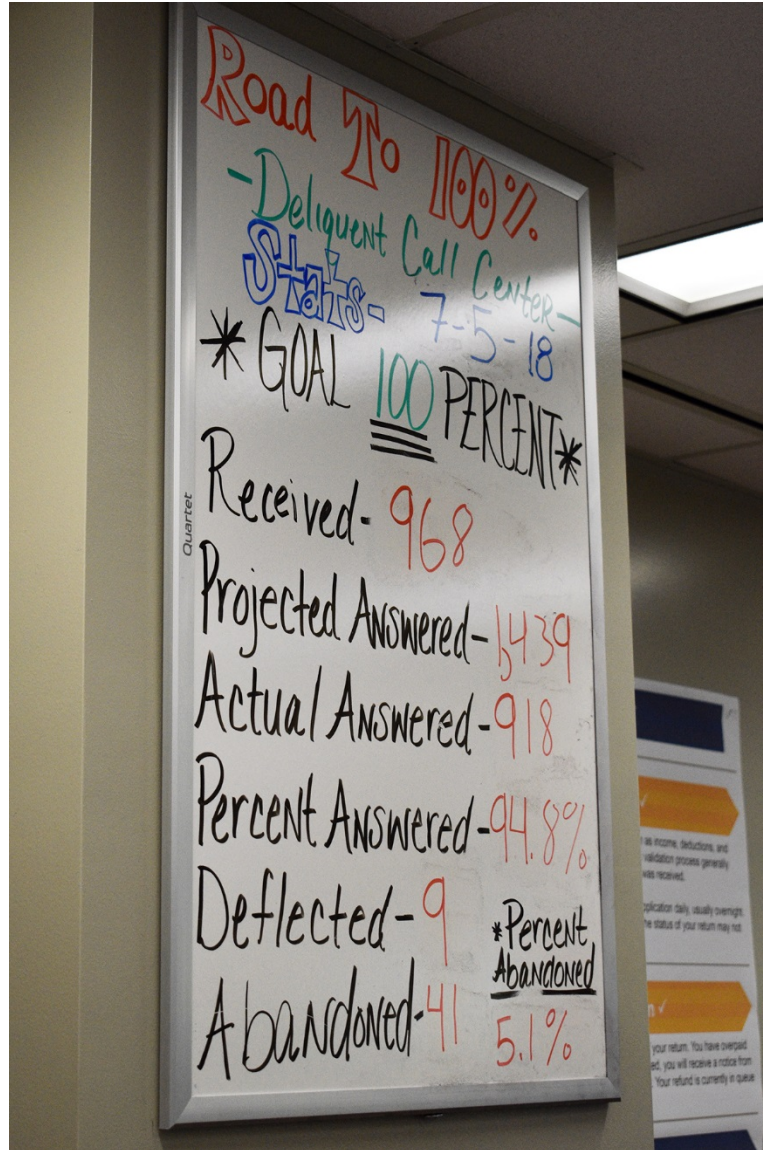
## 2. Workforce Investments

### b) Accountability

- 1) Dashboard – Individual
- 2) ENGAGE
- 3) Storyboards



# 2. Workforce Investments





# 2. Workforce Investments

## Accounts Processing Section

- \* Correspondence Suspensions
- \* Return Mail
- \* Dorras Transmittals (Boxing)
- \* Sorting Mail

- \* Entering P.D.A
- \* Resend Refunds
- \* 1310's
- \* ASAP Return Calls

Backlogs as of EOD = 7-6

	#s
Prior yr suspensions	19
Current yr suspensions	2
PTC suspensions	25
Matching corr to file	409
Individual Return mail	65
Business Return mail	16
Date of ACH Returns	6-21

Corr Recieved	* Corr Processed	* <u>Goals to be Processed by</u>
7-6	7-6	7-4
7-6	7-6	7-4
7-6	7-6	7-4
7-2	6-29	7-2

Less than 50 trays

Less than 50 trays

Within 30 days

out of office

Debra @ 3:00

Beth in @ 12:00

updated by: Christian



# 2. Workforce Investments

**CASHIERING**

### TMS Pass 1 Stats

date- 7-6-18  
Rejected batches- 40  
Scanning cutoff- 11:00 am  
goal- 11:00 am

deposit complete @ 12:15 pm  
month avg- 1:26 pm  
median- 1:27 pm  
goal- 1:30 pm

total returns/checks scanned 2,592/2,016  
month avg- 13,394/11,985

today's author- CH  
date 7-6-18  
time 1:09 pm

### Backlog

track  
money- 0  
no money- 0

ibml  
money- 0  
no money- 0

### Active Tr

- 60844-
- 57733-
- 67922-
- 68207-
- 68212-
- 69107-



## 2. Workforce Investments

Welcome to Quality Review

	2018	2017
BACKLOG		
ORIGINALS	23700	27667
AMENDED	11023	11678
ELECTRONIC	7772	6109



# 2. Workforce Investments

**Backlog**

Correspondence 1317

Letters To Be Mailed 770

Tax Calcs 13,090

**What Are We Doing?**

**DP 110**

Number of Leads - 18,767  
 Years Requested - 2014 and 2015  
 Previous Collections - \$1,199,507

Description:  
 Taxpayer was issued a payment card and third party network transaction form (Form 1099K) with a Missouri address. The Department has no record of a Sales Tax return being filed.

**Employee Shout Out!**

I was driving with my dad the other day and he told me to get out the map from the glove box.

Easy there Indiana Jones, I will just google it.

climbed in the car at least 10 times and the angry mom punched out and was forced to get out of the car.

**MEME of the Week**

## NEXUS

**What Are You Doing?**

Connie Pre-edit

Gabrielle Pre-edit

Jennifer E. ALL Correspondence

Jessica Pre-edit

Jocelyn Money + Pre-edit

Marlayna Pre-edit

Mary BAQ's + DP3, DP7, DP106 Tax calcs

Matthew VDA

Michelle Logging in mail + return mail

Nicole Tax - clearance

Tammy Printing letters + DP3 Tax calcs

Tara ENT + DP3 Tax Calcs

**DOR Place Mat**

**MISSOURI Department of Revenue**

**ASPIRATION** We assist the citizens and businesses of Missouri to meet their obligations.

**THEMES**

<b>United Development Program</b>	<b>Business Development Program</b>	<b>Partnership</b>	<b>Employee Engagement and Retention</b>	<b>IT Business</b>
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**INITIATIVES**

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**MISSOURI Department of Revenue**

**MEASURES**

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**How Does Revenue Fit in Work? The DOR Place Mat!**

- The Revenue Department is a key component of the Missouri Department of Revenue. It is responsible for the collection and management of state revenue. The Revenue Department is a key component of the Missouri Department of Revenue. It is responsible for the collection and management of state revenue.
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**Anniversaries**



## 2. Workforce Investments

c) Action



## 2. Workforce Investments

### c) Action

#### 1) Rapid Response Team





## 2. Workforce Investments

### c) Action

- 1) Rapid Response Team
- 2) Stand Ups



# 2. Workforce Investments





## 2. Workforce Investments

### c) Action

- 1) Rapid Response Team
- 2) Stand Ups
- 3) Educator



## 2. Workforce Investments

- Reclassify a position within CATA to Training Technician I (as recommended by HR). The working title will be Call Center Educator, who will:
  - Develop and maintain the following programs:
    - a. Education programs for delinquent and compliant call centers
    - b. Rapid response education for new and urgent topics
    - c. Cross-education courses to facilitate staff utilization for other Collections and Tax Assistance Sections (e.g. Tax Clearance, Exemptions, Registration, & Garnishment)
    - d. New unit leader courses
    - e. Seasonal refresher courses
  - Create and maintain online education and testing materials
  - Communicate with unit leaders to ascertain education needs
  - Track employee educational progress
  - Randomly monitor employees (on and off probation)
  - Answer employee questions
  - Direct maintenance of call scripts