

Expand Electronic Filing		Agency/Program #: 5801-02-11
		Division: Info. Tech. and Processing
		Program: Info. Tech. and Processing
Agency Name:	Department of Revenue	
Agency Contact:	Margaret Kauska / Larry Finch	9535 / 3526
LFC Contact:	Rep. Sesso and Rep. Taylor	
LFD Liaison:	Greg DeWitt	444-5392
OBPP Liaison:	Mark Bruno	444-4588

Program or Project Description:

Expand Convenient and Cost-Saving Electronic Filing Services for Montana Taxpayers

Appropriation, Expenditure and Source					
Fund Name:	2008		2009		Approp & Expenditure numbers are as of June 30, 2009
	Approp.	Expended	Approp.	Expended	
General Fund					
State Special					
Federal Funds					
Total:	\$0	\$0	\$0	\$0	

Legislative Goal(s):

Expand Convenient and Cost-Saving Electronic Filing Services for Montana Taxpayers

Make it easier, more convenient and less costly for citizens and businesses to file and pay state taxes, increase efficiency of operations, and provide for a more timely and extensive flow of information to policy makers by expanding electronic filing and payment methods for all state taxes and fees other than property taxes. Specifically, 1) implement and expand free Internet filing opportunities; 2) implement the expanded fed/state e-file program for corporate and other business income tax returns; and 3) in selected areas, provide taxpayers with expanded electronic payment options and file transfer services.

Legislative Performance Measures :

Performance in this arena is measured by meeting the due dates (milestone dates) for roll out of the initiatives listed below.

2009 Biennium Significant Milestones:		Completion Dates	
		Target	Actual
1	(A) Provide for free Internet filing of mineral royalty withholding annual reconciliation forms by end of calendar year 2008		31-Dec-07
2	(B) Provide for free Internet filing of employer withholding annual reconciliation forms by end of calendar year 2008		31-Dec-07
3	(C) Provide for free Internet filing of individual income tax Form 2M returns and Elderly Homeowner/Renter Credit (2EC) returns (including electronic payment and direct deposit capabilities) by end of calendar year 2008		31-Jan-08
4	(D) Provide for free Internet filing of wine tax returns, and provide wine taxpayers with the ability to view their current account and previous tax return on the web		31-Jan-08
5	(E) Provide for electronic filing of corporation license tax returns under the fed/state modernized e-file program		5-May-08
6	(F) Provide for electronic filing of returns and other information for all other tax types by mid-year 2009 except for the cases where electronic filing is identified as not being cost effective, feasible or appropriate.		30-Jun-09



Agency Performance Report:

In June 2009, we implemented the following miscellaneous taxes for e-filing: Bentonite, Cement and Mineral, Coal Gross Proceeds, Metal Mines Gross Proceeds, Metal Mines License, Metal Mines Net Proceeds, Resource Indemnity Trust, and then implemented third-party access for taxpayer name and address maintenance. By the end of calendar year 2009, all e-file options on our taxpayer access point (TAP) will also have an e-pay option as well. Another item being implemented in December 2009 is a debt collection application for credit card payments. While the department considers all of the above goals, objectives and milestones for this measure to be complete, we nevertheless will continue to evaluate new items for e-file and pay options as those opportunities arise.

LFD Narrative:

LFD Concern - No appropriation or expenditure information was provided to allow formulating a determination of effectiveness of fiscal policy for this activity.

Progress - This activity is on-track.

Version	Date	Author
LFD Dec 2009	11/12/2009	G. DeWitt

Change Description
Copied agency provided status from OBPP form. LFD Narrative