

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:** Bruce Adams

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**Agency:** Department of Revenue Services

**Project:** IT/CTAX Modernization

**Project Manager:** Bruce Adams

**Reporting Period:** Project Inception through 06/30/2019

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

**Total Funds Allotted to Agency:** \$13,750,000

**Accumulative Total Capital Fund Expenditures to Date:** \$7,542,380

**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

- RFP issued
- Contract negotiations in final stages

As of 7/30/2019

- Contract negotiations with FAST Enterprises were concluded.
- Completed Resource Identification and Staffing – FAST and DRS Employees Onboarded
- Completed the Hardware Installations in Groton and Springfield
- Completed the Project Schedule for Rollout 1
- Completed the Communications Planning
- Completed the Project Planning for Rollout 1
- Completed Business Profiles and Inventory Evaluations
- Completed Agency-Wide Project Kickoff

**Issues and Risks:**

As of 12/31/2018

Failure to achieve a signed contract by the end of February 2019.

Time delay in negotiating the contract has put DRS behind schedule and brings additional risk with the anticipated exodus of staff in 2022. DRS will work with the vendor to minimize the risk by determining what taxes should be implemented in what phase.

As of 7/30/2019

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 commitments.

Development changes due to Legislative/annual implementations may cause resources to be stretched too thin at times.

Agency acceptance of the new system due to resistance to change could impact the acceptance of the new system.

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 7/30/2019

**Details for Rollout 1**

Continue to define the agency's business requirements for the tax types included in rollout 1.

Continue to keep defining the scope of conversion of legacy data to the new systems

Continue to perform development for the business requirements

Identify agency resources for testing and training

Continue to plan for testing and training.