Information Technology Capital Investment Program
Project Close Out Report

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

From: Jason Purslow

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Agency: Department of Revenue Services
Project: Electronic Filing -Real Estate Conveyance Tax Return

Project Start Date: 7/1/2017
Project End Date: 5/10/2018

Project Manager: Jason Purslow

Total Funds Requested: $180,000

Total Funds Allotted to Agency: $180,000

Accumulative Total Capital Fund Expenditures to Date: $131,520

Brief Project Description/Summary:
To provide an electronic filing and payment method for the Real Estate Conveyance (REC) tax return via the DRS website (Taxpayer Service Center (TSC). This would allow attorneys the option to file the return and pay electronically the REC return directly to CT DRS.   These enhancements would relieve the burden of DRS providing the REC forms to all interested parties, the expense of providing a prepaid return envelope and the expense of a vendor to produce these multi-part forms. The Agency and municipalities would then be able to expedite the filing of the REC returns, processing of payments and recording of deeds.

List Project Goals and Deliverables Completed:
(Please provide a brief summary of the goals and deliverables that were implemented. Please reference the IT Capital Investment Brief for the initial goals of the projects.)

Establish Team Members	11/31/2016	Completed
Approve Charter	12/31/2016	Completed
Schedule Kick off meeting	1/1/2017	Completed
Document the current state process, people and technology	12/31/2016	Completed
Review Form-	12/31/20116	Completed
Suggest alternative solutions-	03/31/2017	Completed
Develop electronic filing concept	03/31/2017	Completed
Establish plan to efile return-	03/31/2017	Completed
Obtain Level of effort for TSC enhancement	03/31/2017	Completed
Procure Funding for e-file solution	04/30/2017	Completed
Detail Design for TSC business rules	08/21/2017	In progress
Development	10/1/2017	In progress
Testing	04/16/2018	Delayed**
Communication of Project to partners	03/01/2018	In progress
Migrate code to Production	5/10/2018	CHANGE-Scheduled

Project Replication Opportunities:
(Are there opportunities to repeat or leverage the project solution by other state agencies? Please provide a brief explanation.)
 This on-line application is unique to the Real Estate Conveyance Tax return (OP-236) that is received and supported by the Department of Revenue Services (DRS). DRS was able to capitalize on the filing and payment aspects of the return, but this return is unique to its process and would not lend itself well to other agencies.

Key Lessons Learned:
(Provide any lessons learned or experienced during this project that may be helpful to other agencies starting a similar project.)

Allow adequate time for design and testing. Walk through possible filing scenarios to ensure design is built to handle as many situations as possible. User Acceptance Testing (UAT) resulting in change orders were required as some scenarios were not handled within acceptable parameters.

Involve stakeholders (i.e. Attorneys, Town Clerks) early and provide regular updates. This avoids the application being built for end user use and not able to comment to design and implementation issues.

Allow more time in the beginning before implementing to Production (Live) to avoid conflicts.   This project took approximately 6 months longer than expected due to conflicts in scheduling based on last minute and extensive legislative implementations that took priority with the team over the e-REC project.

Work closer with vendor to avoid "re-creating the wheel". Much work was created unnecessarily as some design details seemed to be already incorporated with other on-line returns available in DRS's existing Taxpayer Service Center *(TSC).* We were assigned a new Project Manager and Developer from the vendor who built the application from scratch and caused many extra design flaw tickets. We kept referring the vendor back to the current TSC application that they support so that it works in the same manner