

Taxpayer Support Division

Assistant Director

Marquetta White

Marquetta attended both U of A and ASU, graduating with a bachelors' degree in Liberal Arts. She received an MBA from the University of Phoenix. Marquetta has served as the Assistant Director for three years. Prior to this assignment she managed the License and Registration Section and established the License Compliance Program

Administrators

Dave Manzer

Bingo Section

Frances Aroz

Debt Set-Off

Joseph Lewandowski

License and Registration

David Smith

Taxpayer Information
and Assistance

Amy Belcher

Ron Coleman

Diane Sosinski

Community OutReach
and Education

Donna Jeane Muccilli

Ecommerce
Marketing Executive



The mission of the Taxpayer Support Division is to meet the needs of each individual customer through tax education, information, and assistance, in a manner that is fair, consistent, accurate, professional, timely and with the highest standards of integrity. The emphasis for the division is to be customer-friendly and to exceed the customer's expectations.

The Taxpayer Support Division takes pride in our achievements in recent years. We have quintupled the number of educational seminars and programs to help people to understand taxes and make it easier to comply. Technology now provides 24/7 access to refund status and other tax information via the telephone. These are exciting times to do business and we look forward to making the most of our opportunities to assist customers.

Taxpayer Support Division

Bingo

Bingo licenses bingo operations (off the Indian reservations) and ensures all licensed assistance to bingo operators.

Community Outreach and Education

Community Outreach and Education (CORE) provides the Department's outreach and education program for taxpayers and tax practitioners. CORE's primary goal is to promote voluntary compliance with tax laws through taxpayer education. The staff develops and presents workshops and seminars throughout the state. Coordination of the Department's speakers bureau helps to develop speakers' skills and provides speakers for events. In conjunction with the Internal Revenue Service and the state universities, tax seminars are held across the state. The CORE staff also coordinates the Department's cooperative effort with VITA (Volunteer Income Tax Assistance) and Tax Counseling for the Elderly. This section is also responsible for the informational publications the Department produces in addition to the TaxNews (practitioner newsletter) and the ReveNews (employee newsletter).

Debt Set-Off

Debt Set-Off serves other state agencies by offsetting tax refunds to reduce debts to other state agencies and the courts. This program includes: qualifying agencies and courts for program participation; notifying agency participants and taxpayers when matches are made on the claims; monitoring status of and validating claims; finalizing matches; resolving discrepancies and generating payment to agencies, and/or releases to taxpayers.

License and Registration

License and Registration processes license applications for the transaction privilege tax, use tax, severance tax, withholding tax, and tobacco licenses; sells luxury tax stamps for tobacco; manages the contractor bonding program affecting specific new contracting businesses and delinquent taxpayers; oversees licensee database, continually collecting and updating taxpayer records; and provides assistance to the public through dissemination of general license information, distribution of tax forms, and cashiering services. The unit also issues transaction privilege tax licenses for contract cities that participate in the state tax collection program.

Taxpayer Information and Assistance

Taxpayer Information and Assistance provides general information concerning business and individual income taxes administered by the Department. This is accomplished through telephone contact, recorded tax information, correspondence, and walk-in services at four locations. The section resolves taxpayer account problems and ensures that all billing inquiries and disputes are resolved in an accurate, courteous, and timely manner. In addition, the section is responsible for reviewing and making a determination on all taxpayer requests for penalty abatements, except for those relating to an audit. If it determines that reasonable cause exists and abatement is warranted, the staff handles any necessary paperwork. If one is not warranted, it represents the department in subsequent hearings.

Highlights

- ◆ Taxpayer Support call center services were consolidated from two units into a single call center. Staff responded to 45,000 calls more than the previous year, for a total of 353,355 agent-handled calls due to improved call management, and increased efficiency. The throughput rate of calls or service level – the percentage of calls received that were served by agents increased from 69% to 82% during the year.

Customer Responses

“Service was excellent telephone agent was polite and knowledgeable”

- ◆ The installation of a new Automated Call Distribution (ACD) system and implementation of an Interactive Voice Response (IVR) system during the tax season expanded service to customers by telephone. The new system allowed tracking of call wait times, which averaged 4.32 minutes for the year. This allowed callers 24/7 access to information such as return/refund status, payment/billing information and license verification, which was previously only available during regular office hours from phone agents. In the month of April alone, more than 70,000 callers were assisted via the automated system.

“Kathy was beyond helpful”

- ◆ Teamwork from throughout the agency provided the volunteers needed to assist in overcoming a serious backlog in resolution of taxpayer problems (cases). These volunteers played a key role in enabling the staff to work almost 10% more cases than the previous year. In addition, significant improvements in productivity resulted in bringing down correspondence turnaround times from a high of 39 days and closed the fiscal year at only 16 days.
- ◆ The Community OutReach and Education (CORE) Section continued their strong efforts to reach out to the business community and other taxpayers, with 633 educational programs that were attended by an audience of 28,705. This was somewhat less than the record audience of 30,000 for 736 presentations last year - a peak that reflected some significant changes in tax statutes.
- ◆ The CORE Section in cooperation with the IRS TCE (Tax Counseling for the Elderly) and VITA (Volunteer Income Tax Assistance) Program, assisted over 3,600 low income taxpayers in the downtown Phoenix area. In addition, 3,247 people were helped at our Rural Tax Assistance events held at eight locations throughout the state.

“Joe was very patient, helpful and explained all that needed to be done and why”

- ◆ Almost 5,000 taxpayers took advantage of our mall outreach program, which provided taxpayers the opportunity to stop by a local mall for tax forms and have questions answered. This was a 25% increase over last year. Feedback from the public on these programs is incredibly positive!
- ◆ The Tax Form Drive-Thru Program was successful in the East Valley, North Valley and Tucson offices, serving a total of 2,154. In addition, the section again cooperated with the IRS to reciprocate in the mailing out of both agency forms for callers requesting forms to almost 2,400 taxpayers – which yielded cost savings to both agencies and saved taxpayers time and hassles in obtaining income tax forms.
- ◆ The Bingo Section instituted a number of changes designed to help licensees with more one-on-one assistance including re-designing the way they will be teaching workshops and providing more individual visits to licensees during the year.
- ◆ By improving their business processes, the Debt Set-Off Section made significant progress in reducing the number of taxpayer refunds for which claims were submitted and subsequently released. This has saved the agencies from paying fees on claims which were released.
- ◆ License application processing averaged 6.4 days, above the objective of 5 days due to higher volume - up by 14% with 48,742 applications processed. Many applicants took advantage of one-stop licensing –783 were issued federal employer identification numbers at our offices.
- ◆ Customer service surveys continued to yield excellent results with ratings that averaged 4.69 of a possible score of five as noted in the customer comments quoted on the left.