



**Municipal Tax Project  
Forum #6  
Pre Deployment  
MEETING MINUTES**

DATE: Thursday, December 16, 2004

TIME: 10:00 a.m. – 2:00 p.m.

LOCATION: MARCS Program Office, Conference Room 3  
2323 West Fifth Avenue, Columbus, OH

ATTENDEES (in alphabetical order):

Chris Fast (Lima), Melinda Frank (Columbus), Laurie Geishel (RITA), V. Faye Gibson (Dublin, OBGSC), Brian Hairston (State of Ohio), Michael D. Jones (Columbus), Robert McDaniels (Columbus), Bob Meaker (CCA, Cleveland), Sunil Meda (CCA, Cleveland), Jim Neusser (RITA), Fred Pamer (Salem), Art Preiksa (Green), Teresa Richter-Gilligan (Cincinnati, OBGSC), Randy Shipley (OBG Municipal Project), Tom Snyder, Tom Stillman, Bryan Thurman (Springfield), Jan Ternes (OBG Program Office), Dan Vinson (OBG Municipal Project), Thomas Zammikiel (RITA, OBGSC), Joe Zapotosky (OBG Program Director), Mark (Columbus), Ryan (RITA), John (State of Ohio), Daryl (State of Ohio), Peter (Toledo)

ORDER OF BUSINESS:

I. Welcome and Opening Remarks

Joe Zapotosky opened the forum with a welcome and thanks to all attendees for attending Forum 6. Mr. Zapotosky outlined the forum's objectives and project's major components, milestones, and accomplishments since September 21, 2004. (*Reference; Presentation Materials.*)

II. Demonstration of the on-line application

A. Municipal application demo and Data File Retrieval

Mr. Zapotosky reviewed the on-line application using an example of one taxpayer filing with three municipalities and filing two payments and one extension (using the guided and express user functions.) An overview of the Payment process was also demonstrated. (*Reference; Presentation Materials.*)

Mr. Zapotosky also demonstrated the Data File Retrieval function using the electronic mailbox, retrieving reports, and reviewing the municipalities' data.

III. Application documentation and Resources

A. Application User Guide

Mr. Zapotosky presented the screen design and flow of the on-line application. (*Reference; Presentation Materials.*)

B. Guide to downloading activity reports

Mr. Zapotosky presented the screen design and flow of the on-line application. (*Reference; Presentation Materials.*)

C. Sample Activity Report

Mr. Zapotosky distributed a sample activity report for review and provided an explanation of the activity and payment information on the report. (*Reference; Presentation Materials.*)

D. Terms of Service

Mr. Zapotosky distributed a draft version the terms of service.

E. Update on Help and Support Processes

The overall objectives of the help and support process were reviewed to demonstrate a unified support delivery through a comprehensive strategy. An explanation of an additional option to the OBG helpline was presented as well as the embedded help feature in the actual application.  
*(Reference; Presentation Materials.)*

#### F. Funds Transfer Update

The implementation approach was explained for banks with the greatest numbers of municipality relationships, banks servicing municipalities with greatest tax revenues, and a plan has been established to address the remaining 53 financial institutions.

#### VI. Outreach and Marketing

Methods for delivery include messages on tax forms and web sites, presentations with professional organizations, business organizations, and media releases. Current scheduled events include: Southwest Ohio GFOA (12/21); OATA Workshop (1.7); CATA Workshop (1/19) and the Ohio Tax Conference (1/27-28).

#### VII. Project Status & Next Steps

Current timeline demonstrates the project schedule is in the system testing phase. The remaining components of training, implementation, and post-deployment are on target for a completion date of January, 2005.

The current team efforts include completion of internal testing, post-forum testing with stakeholders, the implementation of embedded help within the application, and the initiation of outreach activities.

“Start-up” packages are targeted to be distributed the week of December 27, 2004. Upon receipt of the muni certification the confirmation and mailbox password will be distributed. The OBG Muni Tax application is scheduled to deploy to production January 8, 2005.

Written correspondence should be provided by December 23, 2004  
and can be directed to:

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Columbus, Ohio 43215

Email: [joe.zapotosky@ohio.gov](mailto:joe.zapotosky@ohio.gov)

The meeting adjourned at 2:00 p.m.