

WELCOME

Idaho is proud to host the 2014 Western States Association of Tax Administrators (WSATA) conference in Boise. This year our conference focuses on a 3-D Vision for the Future: Dream it. Design it. Do it!

We're **dreaming** up ways to be more innovative, **designing** new methods of implementing our ideas, and **doing** our best to incorporate cutting-edge tools and practices to accomplish our goals.

No matter what area of tax administration interests you most, you'll undoubtedly find new and challenging ideas to share with your counterparts when you return home from this conference.

On behalf of the entire WSATA conference planning committee, thanks for participating in this year's event, and enjoy your stay in the Gem State's capital city!

Rich Jackson
Chairman
Idaho State Tax Commission

ACKNOWLEDGMENTS

2014 WSATA Planning Committee

Rich Jackson
Doreen Warren
Randy Tilley
Mark Poppler
Liz Rodosovich
Valerie Dilley
Renee Eymann

WSATA

Lisa Cross

SCHEDULE AT A GLANCE

Sunday, Sept. 7, 2014

- 2 - 6 p.m. Registration (*2nd Floor Landing*)
6 - 9 p.m. Opening Reception, *Basque Block on Grove Street by Basque Market. (Basque Museum open until 7 p.m.)*

Monday, Sept. 8, 2014

- 7:30 - 4:30 p.m. Registration (*2nd Floor Landing*)
7:30 - 8:30 a.m. Commissioners' Meeting (*Clearwater*)
7:30 - 8:30 a.m. Continental Breakfast (*Ballroom*)
8:30 - 11:30 a.m. General Session (*Ballroom*)
11:30 a.m. - 1 p.m. Lunch (*Ballroom*)
1 - 4:30 p.m. Breakout Sessions
Breakout 1 – Compliance (*Ballroom*)
Breakout 2 – Legal (*Ivy*)
Breakout 3 – Technology (*Riverfork*)
Breakout 4 – Solution Series (*Whitewater*)

Tuesday, Sept. 9, 2014

- 7:30 - 8:30 a.m. Continental Breakfast (*Ballroom*)
8:30 - 11:45 a.m. General Session (*Ballroom*)
11:45 a.m. - 1 p.m. Lunch on your own
1 - 4:30 p.m. Breakout Sessions
Breakout 1 – Compliance (*Ballroom*)
Breakout 2 – Tax Administration (*Ivy*)
Breakout 3 – Property Tax (*Riverfork*)
6 - 9 p.m. Closing Dinner (*Zion's Bank Building, 17th floor, 8th & Main*)

Wednesday, Sept. 10, 2014

- 7:30 - 8:30 a.m. Commissioners' Meeting (*Clearwater*)
7:30 - 8:30 a.m. Continental Breakfast (*Ballroom*)
8:30 - Noon General Session (*Ballroom*)
Noon Conference Adjourns

AGENDA

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7:30 - 8:30 a.m. Continental Breakfast (*Ballroom*)

General Session (*Ballroom*)

- 8:30 - 9:15 a.m. Opening Remarks & Welcome
Rich Jackson, Idaho State Tax Commission, WSATA President; Lieutenant Governor Brad Little, State of Idaho
- 9:15 - 10:15 a.m. Using Technology to Improve Collection Efforts
Thomas Mathews, IRS
- 10:15 - 10:30 a.m. Break
- 10:30 - 11:30 a.m. Data Analytics
Stan Farmer, CGI
Scott Grothe, Idaho State Tax Commission
Wendy Korthuis-Smith, Office of Governor Inslee (State of Washington)
Steve Lappenbusch, LexisNexis

Lunch (*Ballroom*)

- 11:30 a.m. - 1 p.m. Using Social Media to Improve Voluntary Compliance
Kristy Dalton, Government Social Media

Breakout Sessions

Breakout 1 - Compliance (Ballroom)

- 1 - 2 p.m. Sales Tax Compliance in the Age of the Marketplace Fairness Act & Streamlined Sales Tax
Christie Comanita, Arizona Dept. of Revenue
Wayne Harper, Utah Legislature
Warren Townsend, Walmart
- 2 - 2:15 p.m. Break
- 2:15 - 3:15 p.m. Collection Toolbox: Using the Right Tool for the Job (What states are doing)
Jeff McGuire, California Board of Equalization
David Noland, Idaho State Tax Commission
Dee Talbot, Utah State Tax Commission
- 3:15 - 3:30 p.m. Break
- 3:30 - 4:30 p.m. Marijuana Tax: First-year Experiences by Colorado & Washington
Janetta Taylor, Washington State Dept. of Revenue
John Vecchiarelli, Colorado Dept. of Revenue

Breakout 2 - Legal (Ivy)

- 1 - 2 p.m. Improving the Appeals Process
Mary Barrett, Washington State Dept. of Revenue

Demesia Padilla, New Mexico Taxation and Revenue Dept.

Rick Smith, Hawley Troxell

Greg Turner, Council on State Taxation

2 - 2:15 p.m.

Break

2:15 - 3:15 p.m.

DOMA Impact on States

Ryan Gleason, New Mexico Taxation and Revenue Dept.

Ken Ross, Oregon Dept. of Revenue

Phil Skinner, Idaho State Tax Commission

3:15 - 3:30 p.m.

Break

3:30 - 4:30 p.m.

The Cloud & Digital Goods: How States are Updating Old Tax Code for New Types of Transactions

Caleb Allen, Washington State Dept. of Revenue

Michael Cragun, Utah State Tax Commission

McLean Russell, Idaho State Tax Commission

Breakout 3 - Technology (Riverfork)

1 - 2 p.m.

Emerging IT Trends: Clouds

Chris Wilch, Microsoft

Mark Price, CenturyLink

Steve Allen, Idaho State Tax Commission

2 - 2:15 p.m.

Break

2:15 - 3:15 p.m.

Taxpayer Access Portal

Ken Buna, FAST Enterprises

3:15 - 3:30 p.m.

Break

3:30 - 4:30 p.m. The Hacker at the Door: Security in the
Modern Information World
Evan Sylvester, FAST Enterprises

Breakout 4 - Solution Series (Whitewater)

1 - 2 p.m. The Tax Gap and Compliance Enforcement
Joe Milack, FAST Enterprises

Integrated tax systems, data warehouses, and predictive analytics provide revenue agencies with new and more powerful tools and capabilities. How taxpayers file returns and receive information, as well as evasion and avoidance methods, have changed considerably, yet the overall strategy of compliance enforcement has changed little and the tax gap continues to outpace compliance efforts. This presentation provides an alternative perspective on compliance enforcement and suggests an approach to fully leverage and coordinate all of the other capabilities of a revenue agency to increase compliance revenue, encourage self-correction of erroneous returns, and change noncompliant filing patterns.

2 - 2:15 p.m. Break

2:15 - 3:15 p.m. RSI: Why We Do It, The Way We Do It
John Bace, Revenue Solutions, Inc.

For nearly two decades, RSI has provided enabling software and services to the tax industry. In that time, we've observed the power of technology investments as well as the pitfalls. Leveraging our experience, we've organized a software approach that allows our clients to maximize flexibility, to maximize control and to stay in front of future business challenges. It is a technology strategy centered around openness, accessibility of data, configurability, services-orientation and integration of best-of-breed components. Please join us as we

discuss that strategy, define RSI's interpretation of those guiding technical principles - and why they are important to your agency - and provide practical examples of how this approach is creating new opportunities for our clients to improve their taxpayer service, lower system maintenance costs, and conduct business in dynamic new ways.

Tuesday, Sept. 9, 2014

7:30 - 8:30 a.m. Continental Breakfast (*Ballroom*)

General Session (*Ballroom*)

8:30 - 9:30 a.m. Tax Fraud/Refund Fraud
Jason Bell, IRS

9:30 - 10:30 a.m. 1075 Review
Sarah Jones, IRS

10:30 - 10:45 a.m. Break

10:45 - 11:45 a.m. Employee Retention
*Sharon Duncan & Kim Toryanski, Idaho
Division of Human Resources*

11:45 a.m. - 1 p.m. Lunch on your own

Breakout Sessions

Breakout 1 - Compliance (Ballroom)

1 - 2 p.m. Stopping/Resolving Identity Theft from Tax Fraud
*Tawnya Eldredge, Idaho State Tax
Commission*
Dolores Furniss, Utah State Tax Commission
Eric Myers, Colorado Dept. of Revenue

- 2 - 2:15 p.m. Break
- 2:15 - 3:15 p.m. Multi-State Apportionment in the
Electronic Age (sales factor manipulations,
cost of performance)
Lee Baerlocher, Montana Dept. of Revenue
Jeff Henderson, Oregon Dept. of Revenue
Bruce Johnson, Utah State Tax Commission
- 3:15 - 3:30 p.m. Break
- 3:30 - 4:30 p.m. Regulating E-Cigarettes
Don Anderson, Idaho State Tax Commission
Brett DeLange, Office of Attorney General -
Idaho
Stuart Thronson, Washington State Dept. of
Revenue

Breakout 2 - Tax Administration (Ivy)

- 1 - 2 p.m. 1075 Technical Review
James Baird, TransCentra
Jeff Walker, Access Idaho
- 2 - 2:15 p.m. Break
- 2:15 - 3:15 p.m. Customer Service Enhancements
Cathy Fitzgerald, Montana Dept. of
Revenue
Jeff McGuire, California Board of
Equalization
Patti Wilson, Washington State Dept. of
Revenue
- 3:15 - 3:30 p.m. Break

3:30 - 4:30 p.m. Disaster Recovery: Idaho and Montana
MOU Update
*Doreen Warren, Idaho State Tax
Commission*
Tim Wilson, Montana Dept. of Revenue

Breakout 3 – Property Tax (Riverfork)

1 - 2 p.m. Property Tax Administrative Practices
Alan Dornfest, Idaho State Tax Commission

2 - 2:15 p.m. Break

2:15 - 3:15 p.m. Property Tax Roundtable: Hot Issues
*Representatives from the states and
industry*

3:15 - 3:30 p.m. Break

3:30 - 4:30 p.m. Personal Property Tax
*George Brown & Alan Dornfest, Idaho State
Tax Commission*

6 - 9 p.m. Closing Dinner (*Zion's Bank Building, 17th
floor, 8th & Main*)

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7:30 - 8:30 a.m. Commissioners' Meeting (*Clearwater*)

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General Session (Ballroom)

8:30 - 9:30 a.m. Taxpayer Advocacy
Rich Bechtel, Montana Dept. of Revenue
Tina Stuck, IRS
Dee Talbot, Utah State Tax Commission

9:30 - 10:30 a.m.	Behavioral Science: New Insights on Influencing Citizens <i>Stan Farmer, CGI</i>
10:30 - 10:45 a.m.	Break
10:45 - 11:30 a.m.	FTA Update <i>Gale Garriott, Federation of Tax Administrators</i>
11:30 - Noon	WSATA 2015 Preview <i>John Vecchiarelli, Colorado Dept. of Revenue</i>
Noon	Conference Adjourns

NOTES
