



SOUTH CAROLINA DORWAY

Project Highlight

"In my career here, I never had one single thing that changed the agency as much as DORWAY. It's brought the agency closer together."

– Joy Causey, Income Tax Administrator

In 2014, the South Carolina Department of Revenue (SCDOR) was working in two different eras. Part of the agency was working in a 1980s mainframe system and the other half was working in a fragile, unfinished system that was the result of an unsuccessful attempt to modernize. They knew they needed to bring the agency together, and into the future. "Our push was for one system, plus we wanted to make a lot of enhancements," said Sherrie McTeer, Deputy Director of Taxpayer & Business Services (TBS). Specifically, the SCDOR was looking for a commercial off-the-shelf (COTS) system that would propel them to the forefront in both their business practices and technology—and keep them there.



Left to Right: Allison McLendon, Joy Causey, Julia Smith, Luke Price, Omar Gonzalez, Gus Carter, Kelsi Witz, Matt Norman, David Caldwell, Hans Turner, Sherrie McTeer, Mario Alvarez, Krista Clark, Miles Bagwell

Finding the Right Fit

As part of their search for a new system, representatives of the South Carolina Department of Revenue (SCDOR) visited several agencies that were already using Fast Enterprises' commercial off-the-shelf (COTS) software. During their visits, SCDOR staff asked questions about the software and about the agencies' perspectives on their projects. "Everybody walked out with a very positive outlook on what the system could offer us," said Sherry Blizzard, who was part of this team. The SCDOR and Fast Enterprises worked together from August 2014 to August 2018 to implement DORWAY, which successfully replaced all of the agency's legacy software—without a single missed deadline.

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"I wanted to make sure that this product was 10 times better than the systems that we were retiring."

- Mario Alvarez, DORWAY Program Manager

Support and Determination

Executive staff equipped the DORWAY project with all the tools they needed to be successful. "We had support from the top down. If the DORWAY project needed something, that took precedence," said Luke Price, DORWAY SME. Executive staff wanted to ensure the project's success however they could. "We had a director who was adamant that this project would not fail. That set the stage for us going forward," said Mario Alvarez, DORWAY Program Manager. Staff on the project took up this banner and carried it through the project. "We approached the project with the mentality that this was a big investment for the SCDOR and the state that we had to see through—we can't let it fail," said Alvarez.

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"There's a sense of trust and empowerment with everyone and when you can empower people, that is success."

- Sherrie McTeer, Deputy Director of TBS

Preparing for Production

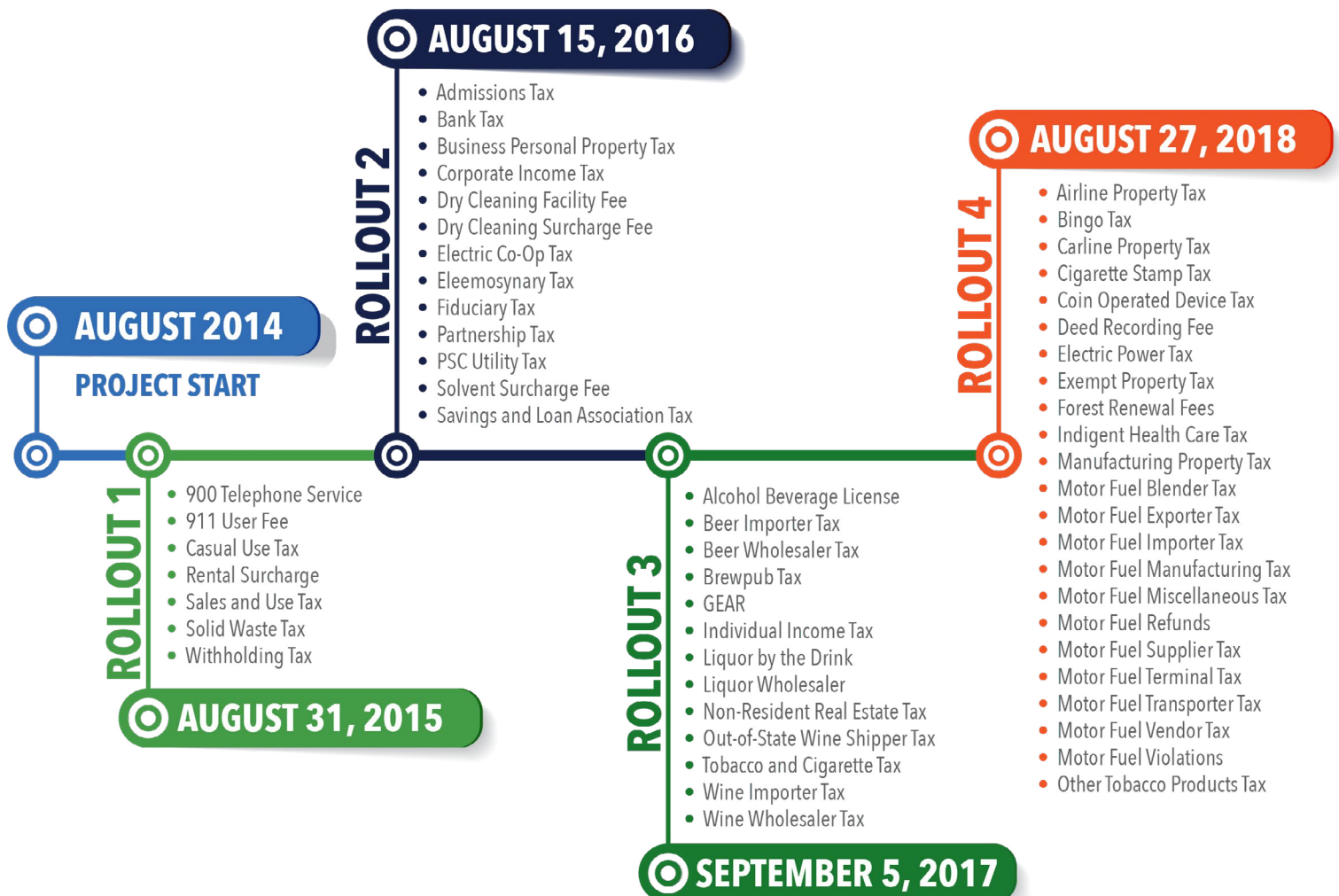
After DORWAY's first rollout, the project split in two, with one team working on future rollouts and another on Production Support. The teams mirrored each other in process and membership. "We built the Production Support process based on how FAST implemented the project," said Alvarez. Like the project team, the Production Support team had leads, subject matter experts (SMEs), and developers. Now that the team has completed their planned rollouts, Production Support SMEs have built



Left to Right: Allison McLendon, Gus Carter, David Caldwell, Joy Causey

up their knowledge of both the system and the agency. "I worked with every business group during the project. The project gave me the opportunity to get to know my own agency," said Gus Carter, Production Support SME. This has enabled a smooth transition to Production Support. Julia Smith, another Production Support SME, said, "I think we did well by establishing the Production Support team very early on in the project. It wasn't like we got to the end of the project and didn't know what to do."

Project Timeline



Benefits

PROCESSES ALL TAXES IN ONE LOCATION

"Before DORWAY, we didn't have anything to process corporate taxes like we did for sales, IIT, and business taxes."

– Joy Causey,
Income Tax Administrator

PROVIDES INTUITIVE ONLINE SERVICES TO TAXPAYERS

"I think we gave taxpayers something that the CPAs, as well as the Mom and Pops can use equally."

– Allison McLendon,
Subject Matter Expert

ENCOURAGES COMPLIANCE

"Since we've been on DORWAY, our voluntary compliance has gone up."

– Matt Norman,
Subject Matter Expert



UPDATES EASILY

"It amazes me to see how fast we turn around corrections."

– Allison McLendon,
Subject Matter Expert

REDUCES PROCESSING TIME

"We had one area that went from being an 8 to 10-hour process spread over three days to what we can now do in 1 to 2 hours in one day."

– Matt Norman, Subject Matter Expert

PROMOTES PRODUCTIVITY

"Staff are spending a lot of time in the system and they're more productive. It's been great to see people just being able to do their work and be happy."

– Gus Carter, Subject Matter Expert

MANAGES TASKS

"The thing I am most proud of is how we can manage tasks now."

– David Caldwell,
Business Tax Administrator

Breaking from the Past

Ensuring a successful project meant avoiding past mistakes. "We needed to be willing to change. Even though we had always done things one way, that didn't mean that was how we needed to do things in the future," explained Sherrie McTeer, Deputy Director of TBS. And change they did. Unlike in past projects, the SCDOR opted to have business leadership be the driving force for the project. "Everything was led by the business—this is the model we find works best for our clients," said Myles Larson, FAST Project Manager (PM). Having a COTS product enabled the SCDOR to focus less on IT logistics and more on business processes. "We were able to clearly define the line between where IT and the business needed to be involved," said Alvarez.

The SCDOR also pushed to have the right staff on the new project. "Our deputy director asked us to provide the best people we could," said David Caldwell, Business Tax Administrator. Joy Causey, Income Tax Administrator,

explained why, "If you're going to invest in the project, you have to consider who you want making decisions. Picking the right staff has paid dividends." Being the best staff for the project not only meant being experts in their business areas, it also meant supporting innovation. "We were told we could make decisions and business process changes," said Brian Smith, DORWAY SME.

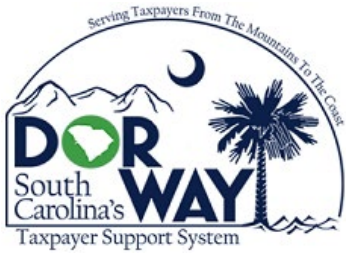
In past projects, the SCDOR had mainly worked with custom-built software. For this project, they specifically sought out a COTS solution. "We thought that if we found a vendor with a COTS system, then they would have implemented best practices from many, many

areas," said McTeer. The DORWAY project relied on best practices enforced by the software and the expertise of other FAST clients. "If we came to an impasse, we would reach out to other agencies. It was really beneficial to find balance between how we do it and how other agencies have done it," said Luke Price, DORWAY SME.

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"It was completely different from how we've managed things in the past."

– Mario Alvarez, DORWAY Program Manager



Facing Challenges

Call Center Support

While increasing the number of self-service options available to taxpayers meant that it was easier for the agency's customers to get the answers they needed, it sometimes also meant they had more questions. To support the influx of taxpayer questions after DORWAY's first rollout, the SCDOR provided additional support to their call center. "Our entire DORWAY team worked together to support all the areas that needed assistance. I think that was part of the success," said Sherry Blizzard, DORWAY Program Manager. Call center staff also used DORWAY to provide click-by-click support to taxpayers. "That is beyond helpful, especially for those first-time users," said Julia Smith, Subject Matter Expert.



Luke Price and Julia Smith

Switching to Front-End Revenue

The SCDOR's legacy systems processed revenue before the agency could fully process returns and payments. Sometimes, this meant that the funds distributed across the state had to be adjusted after the fact. Now, revenue is calculated after all processing is complete. "Our new processing flow means the funds we distribute are more accurate. This creates more peace of mind for everyone," said Blizzard. This adjustment required a change in mindset for the revenue



Left to Right: Allison McLendon, Luke Price, Mario Alvarez, Joy Causey, Gus Carter

division. Krista Clark, FAST PM, said, "It was a huge change for them and their resources." However, they embraced these changes. David Caldwell, Business Tax Administrator, said, "This new system changed everything for us, but I only hear satisfaction from our employees."

Project Name
DORWAY

Project Type
GenTax

Project Dates
August 2014 to
August 2018

Agency Name
South Carolina
Department of Revenue

Agency Mission
To administer the revenue and regulatory laws of the State with integrity, effectiveness and fairness to all taxpayers, while maintaining the highest security and the protection of taxpayer information.

State Nickname
The Palmetto State

State Fun Fact
All major lakes in South Carolina are man-made.

Local Favorite
Geography! There are mountains, plains, and beaches all in one state.



Disseminating Information

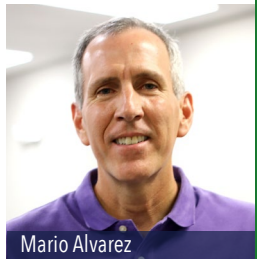
The DORWAY team emphasized communication and training throughout the project. “If you don’t communicate well, don’t have a good training plan, and don’t have a way to manage the change, your project is going to be doomed,” said Mario Alvarez, DORWAY Program Manager. “Communication, training, and change management were the positions I recruited first,” Alvarez said. Having the right staff in these roles was critical. This team held all the typical steering committee and team-wide meetings, bi-monthly meetings with each SCDOR division, and weekly meetings and focus groups with CPAs and taxpayers. They also had a Train-the-Trainer program that left them with a legacy of knowledgeable power users.



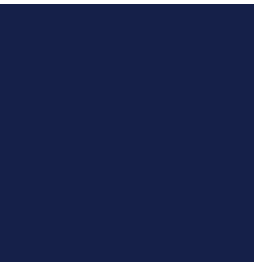
Brian Smith



Sherry Blizzard



Mario Alvarez



David Caldwell



Julia Smith



Sherrie McTeer



Matthew Norman



Krista Clark

Approaching the Future

DORWAY’s main rollouts were completed in August 2018, but the project team has no intentions of slowing down. Krista Clark, FAST PM, said, “The agency is very ambitious. They are still asking how they can keep growing.” W. Hartley Powell, Director of the SCDOR, is a strong proponent of future changes. “While we have accomplished a great deal over the last four years, innovation is never finished. Our technology must continuously evolve to stay fresh, negate security threats, and improve processes,” Powell said. SCDOR staff have adopted this mentality and are excited to contribute to DORWAY’s future. “The staff have all kinds of ideas,” said Julia Smith, SME. In addition to implementing regular service packs, the project team currently plans to implement new functionality and enhancements every six months. Brian Smith, DORWAY SME, said, “We have so much that we want to do and improve. With the new system, we have plenty of time for that.”

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“Change is coming
and change is needed—
perpetually, not just now.”
– Matt Norman, Subject
Matter Expert