



MAINE TAX

Project Highlight

"The whole goal is to be a public servant for citizens. You want to give them the best, and I think we have."

-Deb Sroka, Business System Administrator

In 2017, staff at Maine Revenue Services (MRS) were envisioning a future with an improved customer service experience for Mainers—but their ambitions were stifled by a system rooted in the past. Their custom-built system, initially installed in the 90s, severely limited the online self-service options MRS could offer and was difficult to modernize for the 21st century. For many tax types, Mainers couldn't view their tax accounts, make payments, or check their refund status without contacting MRS. Based on their interactions with businesses and other agencies, taxpayers had come to expect online access to their accounts. MRS leadership knew that they fell short in this area and were seeking out a dedicated customer portal that would meet the growing demand for self-service options. The portal would revolutionize the way Mainers interacted with MRS and the way MRS administered taxes altogether.



Left to right: Row one: Shannon Weeks, Matt Pettengill, Kari Williams, Edgar Manalo
Row two: Holli Willis, Allison Wen, Hayleigh Hagood, Kurt Griebel, Mark Landry, Dereck Tobey, Venus St. Amand, Anna Burdette, Jacob Ward
Row three: Mohamed Yusuf, Charles Lamkin, Isaiah Roman, Janelle Windhorst, Cody Corron, Samuel Roberts, Danny Reeves, Sam Walker, Susan Smith, Adam Chappell, Steven Mowry, Eduardo Madrigal, Deb Sroka, Scott Larson
Row four: Micah Sidorick, Daniel Johnson, Steve Figueroa, Anthony Caskin, Hans Turner, Abdullah Quadri, Jared Taylor, Rob Adams, Brandon Adair, Nathan Everette, Erik Kapaj, Aaron Ellis

Meeting Taxpayer Expectations, and Then Some

Other agencies in similar circumstances have chosen to retain their existing system and add on an online portal. However, MRS's system lacked the flexibility to support such an undertaking. Director of Operations Susan Smith explained, "The system itself worked for the taxes that we had on it, but it didn't take us into the future. Since we couldn't add a portal to the system, we had to start over."

Starting over meant implementing a new system, which would also grant MRS a long-anticipated opportunity to streamline and update their internal processes. MRS staff had a partly integrated system but also had several tax types that were marooned on standalone systems. Deputy Executive Director Vicki Roy said, "It was kind of pieced together. We have 49 different tax types and some of those tax types weren't even on a system." Some of these systems were also built on aging technology, and there were issues with communication across them.

Danny Reeves, Project Manager, said, "MRS was operating on outdated technology and was looking to consolidate onto a single solution. This would modernize the technology and make maintenance simpler by eliminating the various systems that had to communicate with one another." Susan agreed, "We knew we couldn't continue to manage it ourselves. We looked at the whole picture and decided to move forward with an entirely new system."



Left to right: Dawn Davidson, Katie Banach, Anthony Caskin

MRS partnered with Fast Enterprises (FAST) from 2020–2024 to implement the State Tax Administration and Revenue System (STARS)—a modernized, integrated tax system complete with an external customer portal for taxpayers. Laurie Brann, Deputy Director of the Sales, Fuel and

Special Taxes Division, said, "We wanted an upgraded, all-in-one, comprehensive system that we could use. It would be easy to train people, it would be easy for taxpayers, and easy for everybody."

Building a System for Everybody

Prior to the STARS project, MRS staff had little opportunity for cross-division collaboration. “We used to be very siloed, and everybody wanted their own things for their own division,” said Vicki Roy, Deputy Executive Director. An integrated system meant project staff would need to combine disparate processes, reconcile process changes, and make decisions as an agency.

Kari Williams, Deputy Director of the Compliance Division, said the STARS project enabled divisions to align perspectives, “Before, it might have been a struggle to get us to work together. The project helped us form an understanding, and it allowed us to move forward as a group.” When communication challenges arose between divisions during decision making, a shared vision of a successful system ensured that project members stayed on the same page. Jason Pinkham, Deputy Director of the Sales, Fuel and Special Tax Audit Units Division, said, “There’s always compromise when implementing any system, and I think we were able to do that and come up with a product that serves our needs.” Kari agreed, “The amount that we’ve come together and really worked together is incredible—the give and take, the compromises during meetings, figuring out what works best—it’s not something I’ve ever experienced to this extent.”

“*We all wanted to deliver a product that internal and external users could benefit from—because of that focus, we willed it to happen.*”
 —Matt Pettengill
 Deputy Director of Operations



Left to right: Ricky Giffin, Heather Lee, Sam Newcombe

Since STARS was implemented, joint decision making and intra-agency collaboration has continued to bring MRS staff closer together. Property Tax Division Business Owner Lisa Gatcomb said, “Every division is represented in meetings, and we’re communicating more at an agency level than previously, when we were siloed.” Business System Administrator Shannon Weeks said that MRS experienced a culture shift throughout the project. Shannon explained, “It was kind of an ‘us and them.’ Now, it feels more like we’re a whole unit—all of MRS.”

Project Timeline



Welcoming a New Era of Customer Service

A dedicated customer portal has expanded online services far beyond what was available prior to STARS, and taxpayers and MRS staff alike have benefited. Deputy Executive Director Vicki Roy said, "Taxpayers can make payments, set up payment arrangements, and check their refund status online—we used to get phone calls for those requests. A lot of people now don't want to get on the phone—they'd rather use a self-service system, so this has been a big benefit for taxpayers." With taxpayers able to complete more tasks using the portal, the advantages have been three-fold: reduced phone calls to MRS, added bandwidth for MRS staff, and increased customer satisfaction. Matt Pettengill, Deputy Director of Operations, said the public reception has been overwhelmingly positive, "We're constantly pushing the portal as much as we can, and we hear every day that the system is better and easier for taxpayers to use. We get that feedback all the time." Since the customer portal went live, Mainers have been keen to leverage the expanded self-service offerings. Laurie Brann, Deputy Director of the Sales, Fuel and Special Taxes Division, said, "The oldest person I know of that we've walked through the portal was 93 years old. He was determined to get on that portal and file his return, so we made it happen."



Benefits



CONSOLIDATED SYSTEMS

"STARS has significantly improved our efficiency in reviewing potential fraudulent returns because all our information is stored in one application."

-Marek Quinlivan, District Tax Audit Manager, Income Tax Division

"A benefit of STARS is that everything is integrated. It's easy to connect the different pieces."

-Matt Backus, Software Developer



ACCELERATED LEARNING OPPORTUNITIES

"Being on the project was a great opportunity for me because it allowed me to learn about everything we do. It allowed me to talk to everyone in my division, know them personally, and learn about the things that they do every day."

-Rachael Stetson, Subject Matter Expert

"Before STARS, you could not take a sales auditor and put them on the income audit division and have them do the work. Now, you could easily switch them over. That wasn't possible before."

-Jacob Ward, Business Systems Quality Assurance Analyst

"Before, it was a challenge for people to get used to how clunky the old system was. Now, STARS flows, so they can focus more on what they need to know, like tax code, instead of how to use the system."

-Deb Sroka, Business System Administrator



INCREASED AUTOMATION

"The refund turnaround is faster than it was in legacy. I point this out specifically because it is a win for not only the taxpayers receiving those refunds, but also the staff who would have been answering the many 'Where's my refund?' calls."

-Lydia Williams, Tax Section Manager, Income Tax Division

"For our individual filers, the time it takes to process their returns has been greatly reduced. Those returns can be reviewed a lot quicker because ones with no errors go right through. They don't need human intervention on everything."

-Darcie Thompson, Subject Matter Expert

"We have more automated fraud review and have cut down on the majority of our fraud staff's manual review process when it comes to identity theft. It's truly amazing!"

-Lisa Greaton, Deputy Director, Income Tax Division



Pre-Conversion Cleanup

The STARS project officially began in the fall of 2020, but MRS leadership were determined to build a strong foundation for the project by getting a head start. Susan Smith, Director of Operations, explained, “We spent 3 years preparing for this project—there were 5 or 6 of us that started meeting early and planning.” This included cleaning up decades of legacy data to enable a smooth transfer of information to the new system. “We did a lot of data cleansing. We ran exports from our legacy system, and we updated addresses, business codes, and EINs so that, when conversion came, everything would convert over cleanly,” said Laurie Brann, Deputy Director of the Sales, Fuel and Special Taxes Division. Once the project was in full swing, project members felt the effects of this early effort. Business System Administrator Shannon Weeks said, “I feel like the prep work before conversion really helped us.” Susan agreed, “Conversion was not one of our major challenges. We had a few hiccups along the way, but it was a lot less than what would be expected. Having sat through other conversions in other systems, this went very well.”



Left to right: Mark Landry, Beth S., Deb Sroka

Project Name

State Tax Administration
& Revenue System
(STARS)

Project Type

Tax

Agency Name

Maine Revenue Services
(MRS)

Vision Statement

Our vision for Maine Revenue Services is to be the most effective, innovative agency in Maine state government. We are committed to providing the citizens of Maine with outstanding service and we will continuously strive to exceed their expectations.

Population

1.4 million



Capital

Augusta

Fun Fact

In the US, Maine is the largest producer of lobster, which Mainers colloquially refer to as “bugs of the sea.”

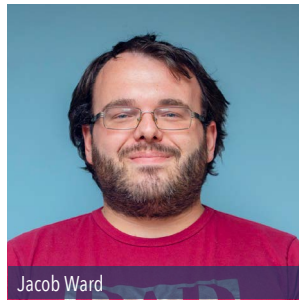




Danny Reeves



Deb Sroka



Jacob Ward



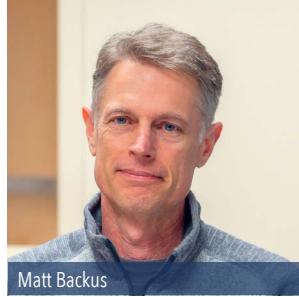
Jason Pinkham



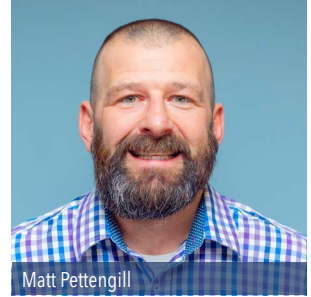
Kari Williams



Laurie Brann



Matt Backus



Matt Pettengill



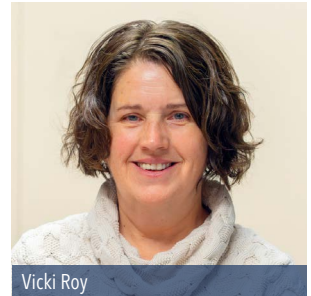
Rachael Stetson



Shannon Weeks



Susan Smith



Vicki Roy

A Significant Step Forward

STARS enabled MRS to deliver a customer-facing portal teeming with tools that empower taxpayers and to revamp internal processes for its employees. “With STARS, taxpayers can independently file every single tax type that MRS is responsible for administering—that’s a significant step forward in improving customer service,” said Danny Reeves, Project Manager. MRS staff take personal pride in the improvements customers have seen. Rachael Stetson, Subject Matter Expert, said, “We’re delivering something to Maine taxpayers that brings value. That is a big thing that I really wanted to do as a person working on STARS—make sure that it’s something that people can use and make their lives easier.”

Next on deck for MRS are a series of technical improvements, including a version upgrade and a migration to a cloud-based infrastructure, which they will complete in continued collaboration with FAST. Vicki Roy, Deputy Executive Director, said staff are also exploring process efficiencies made possible through STARS. “I think we’d like to do more with the system now that it’s in place. I’d like to take a look at the processes and see what we can improve on,” Vicki said. Where it once may have been burdensome for MRS to make these changes, staff can now take advantage of the flexibility of STARS to face changes head-on. Deputy Director of Operations Matt Pettengill said, “It’s hard to say what the future is going to be, but for us, having STARS sets us up for where we need to be.”

“

We’ve gotten accustomed to the system, but now we’re putting it through its paces to see how we can make it better—how can we make it more efficient for us.

*—Laurie Brann
Deputy Director of the Sales, Fuel
and Special Taxes Division*

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