

# Report Title: IT Strategic Plan Summary

Agency: 161 Department of Taxation

## Current Operational IT Investments

***In this section, describe the high-level strategy the agency will use to manage existing operational IT investments over the next year to 5 years. This section should align with identified Business Requirements for Existing Technology (BReTs). At minimum, please address the following questions in your description of your agency's strategy for managing existing operational IT investments:***

***Are there existing IT investments that will require additional funding over the next year to 5 years, such as license renewals, re-competition of current IT contracts, or system enhancements required by the Agency Strategic Plan?***

***If there are systems that will no longer support the agency's business needs, either through poor performance or excessive cost, how does IT leadership in the agency plan to address the issues?***

***If the agency does not have the staff or funding to meet increasing demand for IT services, how will IT leadership fulfill the requests?***

The Department of Taxation has made Information Security its number one priority. In support of this priority as well as ongoing agency operations, technology has placed primary emphasis on upgrades, maintenance, mandated enhancements, and desired enhancement to IRMS, our agency application suite. In addition, the agency spends considerable time coordinating activities with VITA and Northrop Grumman related to the Commonwealth's outsourced infrastructure to ensure compliance with enterprise mandates and standards. Current technology projects for the agency are: As stated, TAX's primary focus is currently on information security. Tax is a highly automated agency and houses approximately 60 terabytes of highly sensitive state and federal taxpayer information, plus hundreds of COTS products and numerous custom large scale applications. Ensuring our security profile is effective is a large undertaking. Compounding our size, is our external offerings. Constituent self-service is a goal of the Commonwealth, a demand of taxpayers, and an excellent method to reduce agency operational costs and/or compensate for a shrinking workforce. Taxation has embraced the self-service concept, and Agency applications give taxpayers access to their tax accounts via the internet, basically allowing taxpayers access to their information from anywhere in the world. In addition to a wide-variety of internet based applications serving taxpayers, Taxation also has internet based applications that service other Agencies, Virginia Localities, and Courts. Added to this is a robust telework environment for agency staff that allows sensitive data access from outside our primary office space. Given the breadth of our applications and the numerous access point, Taxation has a higher than average risk for data loss. Storage of highly sensitive information and a belief that state systems are directly tied to Federal systems have made the Commonwealth a highly-valued target for hackers. Unfortunately, hackers become more sophisticated every day, and ensuring data and applications are as protected as possible is a continual activity and requires significant automation, especially given the agency's limited resources. Government entities are the number two target of hackers and VITA reports that over 117 million attack attempts have been blocked at the Commonwealth's Data Center. Unfortunately, not all attempts are blocked. Every day Commonwealth agencies, including Taxation, deal with security incidents, with viruses and malware being the most common. To ensure TAX systems continue to meet or exceed Commonwealth and IRS security standards, TAX continues to focus on applying security patches and upgrading computer-off-the-shelf-software (COTS) products and VITA out of scope agency infrastructure items, for technology whose vendor support has expired, or will expire in the near future. This process is required to maintain vendor support in order to receive vendor supplied security patches and updates and to ensure continuity of operations for TAX's mission critical applications and to ensure the agency takes advantage of new security features and increased functionality with new versions or releases in order to improve security and operational efficiency. TAX has significant focus on refund review. This focus is needed to prevent fraudulent refunds from being issued. Unfortunately, as hackers have become more sophisticated in obtaining sensitive information so have those seeking

fraudulent refunds, as such to ensure requested refunds are validated TAX must continually perform refund review activities which require significant automation. The mandated upgrades to VITA/Northrop Grumman's enterprise infrastructure continue to consume a large portion of the agency's technical resources over the last year. TAX staff completed numerous projects working with VITA/NG such as: HP Unix upgrade, Redhat Linux upgrade, and various security initiatives activities. We are currently, either independently, or in conjunction with VITA/NG, Trillium, MicroFocus Cobol, Tivoli, Siebel, JBoss, FileNet, Visual Basic, and applying/catching up on security patches to help maximize our security profile. TAX has focused extensively on expanding our electronic interactions, both from an internal and external perspective. We have expanded eForms which allows our taxpayers and preparers to file their business taxes electronically. eFile for PTE filers has been implemented and soon will Fiduciary, this allows electronics download and processing of these returns as a pass thru as a result of the taxpayers filing their federal returns using an approved vendor software. We have successfully received legislation mandating some business taxes be filed electronically. Overall, we have expanded our electronic filing usage, and have automated several internal forms to improve internal operations. These initiatives reduce agency operational costs, and provide new services to our taxpayers. TAX continues to maintain the various aspects of IRMS, our enterprise application, and make requested enhancements to its base functionality. In addition, each year brings legislatively mandated updates to tax regulation, which must be incorporated into our IRMS applications to ensure proper processing of tax returns and revenues. This maintenance and enhancement ensures efficient operations for both our technology users and for taxpayers by streamlining existing processes, or easing the burden of filing and paying taxes. As a result of the existing IT investments TAX is under staffed and will require additional funding to continue our goal of enhanced security, improved taxpayer self-service, and improved operational efficiency. TAX will use staff augmentation when necessary to meet the demands of the required work where Full Time Equivalent (FTE) staffing are not required, if the result of the project necessitates ongoing support, TAX will request FTE or convert staff augmentation resources to FTE. Due to insufficient staffing and funds, the agency continually addresses the highest priority work that will provide the greatest benefit to the Commonwealth. Lower priority items are tracked for future consideration.

### **Factors Impacting the Current IT**

***In this section, the agency will describe the changes in their business environment that will require or mandate changes to the agency's current IT investments. These are requirements and mandates from external sources, such as other agencies or business partners, the agency's customer base, product and service providers, or new federal or state legislation or regulations. The agency must identify the business value of the change, any important deadlines that must be met, and the consequences if the deadlines are not met. In your discussion, be sure to note whether the proposed enhancements are funded or not. If the agency's existing current IT investments will not need enhancement due to requirements or mandates from external sources in the foreseeable future, the agency should enter the following text rather than leave the Factors Impacting the Current IT section blank***

***For each mandated change, summarize your agency's response from your Agency Strategic Plan, and is it the opinion of agency IT leadership that the IT portion of the response is adequately funded?***

***Do the mandated changes effect IT in other Commonwealth agencies, or in other states? If so, how?***

Technology systems, including application software and hardware, must be upgraded and refreshed on an ongoing basis to ensure they operate correctly and are available for use by end users. Further, TAX must refresh hardware, upgrade and patch software versions in a timely manner to eliminate the risk of the Commonwealth's revenue systems becoming vulnerable to security breaches, obsolete or unsupported, jeopardizing all of TAX's business operations. These items are funded via the agency's core budget. VITA/NG's roadmap for enterprise systems continually impacts agency staff as we work to meet roadmap requirements and navigate the VITA/NG bureaucracy for determining how the upgrade project will move forward. These items, if known prior to budget prep, are included in the agency's core budget. Most tax-related legislative changes necessitate changes to TAX's automated systems. The variety of filing and service "channels" provided by TAX often means the change must be made in

several systems, each supporting a different channel. Shared Services Transition scope, timeframes and budget could severely impact Technology's ability to meet business constituents needs. These items are not funded in the agency's core budget: SECURITY SHARED SERVICES (TAX will hire a contractor or contract staff to perform security and audit functions), Cloud Application Hosting (SAAS), IT Infrastructure Transition. The customer demand for and use of electronic, self-help services continue to increase, requiring continued capacity expansions within existing services. Decision packages are prepared as required to fund these activities. Taxpayers, agency management and general staff continue to demand automated solutions to replace historically manual tasks. This results in increased operating efficiency and improved customer services, but requires an ongoing commitment to information technology services. Where funding exists, the agency moves forward with changes that will benefit the Commonwealth. The necessity to assign staff to VITA/NG activities has a negative impact on the agency's ability to meet its internal technology needs.

### **Proposed IT Solutions**

***In this section, describe the high-level strategy the agency will use to initiate new IT investments over the next year to 5 years in support of the agency strategic objectives documented in your Agency Strategic Plan. The agency does not need to consider specific technologies at this time, however, the strategy should identify how the IT implementation will provide business value to the organization. This section should align with identified Business Requirements for New Technology (BRNTs). At minimum, please address the following questions in your description of your agency's strategy for initiating new IT investments:***

***What are the most important solutions, based on the priority assigned to the requirements by the business sponsors in your agency, and what is the approach to achieving these priority solutions?***

***If any new IT initiatives will be started in the upcoming budget biennium, is it the opinion of agency IT leadership that it is adequately funded?***

***Does the agency's current IT staff have the appropriate skill set needed to support future agency technologies? If not, what skill sets need to be acquired?***

***If the agency will be engaged in multiple new IT initiatives, how will agency IT staff and agency subject matter experts be used across the initiatives?***

TAX continuously implements numerous changes to its technology environment and its technical capabilities. But, technology changes rapidly, and the Agency must position itself to stay current in order to meet the increasing demands of constituents and Commonwealth personnel. With this increase in demand in the forethought, the following IT changes are anticipated (TAX will evaluate the support required for each proposed IT solution to determine if the development resources will be needed ongoing. In the event, ongoing support is needed TAX will investigate the option of requesting FTE rather than staff augmentation resources.):

The Commonwealth is currently working under time constraints to move to new enterprise infrastructure and service suppliers. Agencies will be expected to transition within prescribed timeframes in order to achieve the business case objectives and to avoid additional costs. TAX will utilize staff augmentation as required to ensure compliance and cost avoidance for the Commonwealth.

Agency commercial off-the-shelf products (whether customized or used out-of-the-box) and VITA out of scope agency infrastructure items, will be upgraded to the most current stable versions on a continual and rotating basis. This will ensure that COTS products maintain vendor support, and that our systems avail themselves on all new, and stable, functionality offered. By ensuring a supported platform all users of our technology, internal and external, will be served through improved security features, higher availability and enhanced functionality. Associated BRTs: BReT Jboss Upgrade.

The Agency security initiatives will augment staff and procure additional security software products to ensure enhanced security of taxpayer data. TAX will utilize software and staff that will not only track access, but assist with granting and terminating access, access reconciliations, reporting, and ensuring proper protocol has been followed when utilizing/consuming taxpayer data. TAX has an extremely robust technical environment, with a significant number of sensitive applications, COTS products, and a large data foot-print. Constituent self-service is a goal of the Commonwealth, a demand of taxpayers,

and an excellent method to reduce agency operational costs or compensate for a shrinking workforce. Taxation has embraced the self-service concept, and Agency applications give taxpayers access to their tax accounts via the internet, basically allowing access to sensitive information from anywhere in the world. In addition to a wide-variety of internet based applications serving taxpayers, Taxation also has internet based applications that service other Agencies, Virginia Localities, and Courts further increasing the risk of data loss.

Storage of highly sensitive information and a belief that state systems are directly tied to Federal systems have made the Commonwealth a highly-valued target for hackers. Unfortunately, hackers become more sophisticated every day, and ensuring data and applications are as protected as possible is a continual activity and requires automation.

Government entities are the number two target of hackers and VITA reports that over 117 million attack attempts have been blocked at the Commonwealths Data Center. Unfortunately, not all attempts are blocked. Every day Commonwealth agencies, including Taxation, deal with security incidents, with viruses and malware being the most common. Associated BRT: BReT Security Initiatives

TAX has significant focus on refund review. This focus is needed to prevent fraudulent refunds from being issued. Unfortunately, as hackers have become more sophisticated in obtaining sensitive information so have those seeking fraudulent refunds, as such to ensure requested refunds are validated TAX must continually perform refund review activities which require significant automation. Associated BRT: BReT Refund Review Program

Tax implemented a new Identity and Access Management (IAM) system in fall of 2016 in order to address a security gap between access that was approved and the actual access that was provisioned. SailPoint is the new IAM system and it has dramatically improved Virginia Tax's capability to understand precisely what privileges each user of the Agency's sensitive systems have. SailPoint is significantly better than the previous system because it fully integrates with the backend systems allowing Management, Security, and Internal Audit to see all privileges associated with any given identity. The tool allows for auto provisioning and de-provisioning of systems access ensuring that the exact privileges are granted or removed. In order to meet some very aggressive timelines the SailPoint implementation team was required to integrate with all sensitive systems in one large implementation. When SailPoint was fully integrated into the TAX systems the team determined that there are over 22,000 total possible entitlements available for the systems. Of these 22,000 entitlements only approximately 8,000 of them are utilized. The team has been diligently working to clean up from the implementation but it is a significant scope of work that is forecasted to take multiple man years given the current resources assigned to the project. The Agency operational areas are requesting Business Roles to be developed so that users in the same position can be granted the same access to multiple systems with a single role. In order to implement business roles the system entitlements and IT roles need to be verified and cleaned.

In order to address the systems access cleanup and further secure the Virginia Tax sensitive systems TAX request approval to utilize professional consulting services to assist and guide the ongoing phases of developing a mature Identity and Access Management program. Associated BRT: BReT Sailpoint Identity and Access Management Services

TAX continues to maintain IRMS. However, the current Agency resources are insufficient to meet all the requested (and in some cases required), enhancements that are received following a major implementation. To better meet the needs of IRMS users, TAX will still require development staff augmentation to ensure the proper implementation of legislated mandates, approved requested enhancements, normal maintenance, and regular upgrades. TAX evaluate the support required to determine if the resources will be needed ongoing, in the event ongoing support is needed TAX investigates the option of filling the role with a FTE. Associated BRTs: BReT IRMS Maintenance and Enhancement Support - FY19/FY20, and BReT Vendor Treasury Offset Program

Tax currently utilizes Microsoft Word to generate all outbound taxpayer correspondence. The Agency currently prints upwards of 12 million taxpayer letters annually based on approximately 800 unique Microsoft Word templates. The complexity compounds itself because Virginia Tax maintains previous versions of the correspondence templates which brings the total number of unique templates up to more than 2,500. The Agency has standardized on Office 2007 for the past 10 years due to the significant level of effort required to upgrade Microsoft Office and test each of these unique templates. The Agency

is currently undergoing that upgrade process to standardize on Office 2016 but wants to break the dependency between taxpayer correspondence and Microsoft Word in order to recognize substantial internal savings as well as providing flexibility with important and strategic communications to our taxpayers. Associated BRT: BReT Taxpayer Correspondence Replacement

The current application development technology is unsupported which is not compliant with TAX and the Commonwealth's security requirements. TAX has limited resources with expertise on the unsupported development platform to maintain and implement new and current development requirements.

Associated BRT: BReT Audit WorkBench Enhancement

FileNet is Tax's mission critical application that support the document image repository for scanned paper tax returns, correspondence, audit papers, etc. Agency staff use FileNet to view images of the documents stored in the repository.

The application is currently implemented as an on premise solution hosted at the data center in Chesterfield Va (CESC). TAX would like to move the FileNet application to a cloud hosting option offer by the vendor (IBM). The requested funding will be used to cover the onetime cost for professional services and infrastructure overlap cost while transitioning to the cloud service. The Commonwealth and TAX would realize the following benefits as a result of the cloud hosting option:

- VITA Transition – As a cloud hosted application there will be little to no migration work during the VITA transition efforts
- Cost Savings - The cloud options will result in a cost savings of around \$475,000 annually
- Security - The vendor will perform Software upgrades as part of the hosting service ensuring upgrades are current and with less agency impact
- Scalability (increase) - TAX will be able to add more servers and storage during peak demands in as little as a couple days versus several months notice required to affect change with our current on premise implementation.

Scalability (decrease) - TAX will be able to remove servers when peak demand drops in as little as a couple days versus several months notice required to affect change with our current on premise implementation, keeping costs low.

Associated BRT: BReT FileNet P8 Cloud Upgrade.

# Report Title: Strategic Plan

Agency: Department of Taxation

## Current IT Services

Category	Costs Year 1		Costs Year 2	
	GF	NGF	GF	NGF
Projected Service Fees	\$14,530,395	\$344,470	\$14,966,307	\$354,804
VITA Infrastructure Changes	\$348,340	\$0	\$656,302	\$0
Estimated VITA Infrastructure	\$14,878,735	\$344,470	\$15,622,609	\$354,804
Specialized Infrastructure	\$4,783,222	\$0	\$5,606,685	\$0
Agency IT Staff	\$14,090,391	\$0	\$14,229,891	\$0
Non-agency IT Staff	\$640,000	\$0	\$640,000	\$0
Cloud Computing Service	\$100,000	\$0	\$100,000	\$0
Other Application Costs	\$720,754	\$0	\$792,830	\$0
<b>Total</b>	<b>\$35,213,102</b>	<b>\$344,470</b>	<b>\$36,992,015</b>	<b>\$354,804</b>

## Proposed IT Investments

Category	Costs Year 1		Costs Year 2	
	GF	NGF	GF	NGF
Major IT Projects	\$2,539,850	\$0	\$0	\$0
Non-Major IT Projects	\$1,208,835	\$0	\$0	\$0
Agency-Level IT Projects	\$0	\$0	\$0	\$0
Major Stand Alone IT Procurements	\$2,500,000	\$0	\$2,250,000	\$0
Non-Major Stand Alone IT Procurements	\$1,089,692	\$0	\$156,192	\$0
Agency-Level Stand Alone IT Procurements	\$0	\$0	\$0	\$0
Procurement Adjustment for Staffing	\$0	\$0	\$0	\$0
<b>Total</b>	<b>\$7,338,377</b>	<b>\$0</b>	<b>\$2,406,192</b>	<b>\$0</b>

## Projected Total IT Budget

Category	Costs Year 1		Costs Year 2		Total Costs
	GF	NGF	GF	NGF	
Current IT Services	\$35,213,102	\$344,470	\$36,992,015	\$354,804	\$72,904,392
Proposed IT Investments	\$7,338,377	\$0	\$2,406,192	\$0	\$9,744,569
<b>Total</b>	<b>\$42,551,479</b>	<b>\$344,470</b>	<b>\$39,398,207</b>	<b>\$354,804</b>	<b>\$82,648,961</b>



**Report Title: Business Requirements For Technology**

Agency: Department of Taxation (TAX)

**BReT - OCe Printer Upgrade FY16****BRT Type:** Business Requirement for Existing Technology**Date Submitted:** 6/1/2015**Mandate:** No**Mission Critical:** Yes**Description:**

The current OCe printers will reach end of Life 12/31/2015. TAX must replace these printers in order to maintain vendor support.

**BReT Corr - Taxpayer Correspondence Replacement****BRT Type:** Business Requirement for Existing Technology**Date Submitted:** 8/24/2017**Mandate:** No**Mission Critical:** No**Description:**

Virginia Tax currently utilizes Microsoft Word to generate all outbound taxpayer correspondence. The Agency currently prints upwards of 12 million taxpayer letters annually based on approximately 800 unique Microsoft Word templates. The complexity compounds itself because Virginia Tax maintains previous versions of the correspondence templates which brings the total number of unique templates up to more than 2,500. The Agency has standardized on Office 2007 for the past 10 years due to the significant level of effort required to upgrade Microsoft Office and test each of these unique templates. The Agency is currently undergoing that upgrade process to standardize on Office 2016 but wants to break the dependency between taxpayer correspondence and Microsoft Word in order to recognize substantial internal savings as well as providing flexibility with important and strategic communications to our taxpayers.

In addition to eliminating 3rd party (Microsoft Word) dependencies and establishing a real-time communication platform, the correspondence engines on the market also provide multiple features that would aid in the Agency's ability to communicate with its customers including:

- Customer Service Improvements – modern correspondence engines offer improved methods of communication that are designed to decrease expensive calls to Virginia Tax's three call centers.
- Omni-channel support – taxpayers could opt in for email and mobile correspondence allowing them to communicate in the channel of their preference which will drive higher satisfaction and expedited payment. Multiple studies have shown customers across all industries are using mobile apps 50% more to conduct business than 10 years ago.
- Template consolidation – based on industry standards Virginia Tax could go from maintaining 800 current templates to less than 100 templates which would dramatically decrease the day to day support costs of the current system.
- Global changes – the Agency would have the capability to make changes to all templates or a subset of templates. i.e., a global change to logo or seal. This functionality would allow the Agency to react or plan for Cyber Security attacks/threats or other important communications in hours versus days.
- Advertising campaigns – Virginia Tax could use the excess whitespace on correspondence to push initiatives like opting in for electronic correspondence empowering the Agency to optimize all communications delivered.

- Archival – Agency will be able to directly update the Enterprise Content Management system with an archived copy of the correspondence. Current archive copies are dependent on 3rd party (Microsoft Word) putting the Agency at risk at recreating past communications. A modern correspondence engine would allow the Agency to create a digital image (PDF) for archive.
- Business Driven – Modern correspondence engines empower the Business User and are far less dependent on IT resources. This allows the Agency to be much more efficient and strategic with all communications as the Business User is able to make changes in hours/days instead of weeks.
- Platform consolidation – Capability to combine forms design with correspondence design will further consolidate the number of applications Virginia Tax maintains. The ability to import regulated forms into the Correspondence Systems will allow for far greater efficiencies, cost savings and improved design capabilities.
- Field Auditor communication improvements – A modern correspondence engine will provide a guided experience for Field Auditors improving their ability to easily and effectively generate accurate correspondence that utilizes pre-approved content and templates. This will eliminate expensive calls to the call center as all communications will follow strict Agency guidelines.

**BReT- eForms Development & Implementation Support FY15-18**

<b>BRT Type:</b>	Business Requirement for Existing Technology
<b>Date Submitted:</b>	11/24/2014
<b>Mandate:</b>	No
<b>Mission Critical:</b>	Yes

**Description:**

TAX requires approval to procure the services of NGNious Solutions to provide support to perform enhancement activities to expand the electronic submissions capability of the proprietary eForms system. See the attached Sole Source Procurement Approval Request Form for more details.

**BReT FileNet P8 Cloud Upgrade**

<b>BRT Type:</b>	Business Requirement for Existing Technology
<b>Date Submitted:</b>	9/28/2017
<b>Mandate:</b>	No
<b>Mission Critical:</b>	

**Description:**

This procurement will utilize professional services to support and provide technical assistance to TAX with migrating on premise FileNet P8 to the cloud along with upgrading various additional tools related to TAX's mission critical imaging application, FileNet.

**BReT FileNet Upgrade P8**

<b>BRT Type:</b>	Business Requirement for Existing Technology
<b>Date Submitted:</b>	9/15/2014
<b>Mandate:</b>	No
<b>Mission Critical:</b>	Yes

**Description:**

This procurement will utilize professional services to support and provide technical assistance to TAX with the FileNet Image Services Upgrade to the P8 version along with upgrading various additional tools related to TAX's mission critical imaging application, FileNet.

**BRet IRMS Maintenance and Enhancement Support - FY17/18**

<b>BRT Type:</b>	Business Requirement for Existing Technology
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<b>Date Submitted:</b>	3/29/2016
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<b>Mandate:</b>	Yes
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<b>Mission Critical:</b>	Yes
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**Description:**

The Department of Taxation requests approval to allocate TAX staff and enter into a Staff Augmentation contract for developers to perform maintenance and enhancement support TAX Integrated Revenue Management System (IRMS). These resources will also assist with implementing legislative changes, routine maintenance, and systems enhancements aimed at operational efficiency, cost savings, cost avoidance, and improved customer service.

## System maintenance requirements:

1. Ensure TAX applications are performing to the functional detail requirements in support of daily business operation
2. Ensure TAX application are available per the business needs
3. Ensure TAX applications are patched and upgraded to ensure continued vendor support and adequate security

## System enhancements requirements:

1. Ensure improved worker productivity and make TAX employment attractive to future workforce
2. Ensure TAX applications are performing to the requirement of TAX and the Commonwealth's strategic direction
3. Improve information sharing to optimize current business functions
4. Expand the support of TAX applications and productivity tools that support the recommendations on streamlining government operations
5. Ensure programs and tools which enable all citizens to interact with TAX 24x7 – Safely and Securely

## Mandated System enhancement requirements:

1. Ensure TAX applications are performing to state and federal mandated requirements
2. Ensure TAX applications are in compliance with security standards

Furthermore, this request is to provide administrative, security, application analysis, design and development support for IRMS via the following work areas: Advantage Revenue, VTOL (Virginia TAX Online), Report and interfaces, Unix and Database Administration, Siebel, and Return Reconstruction and Compliance Repository (CR), Processing (TACS/KFI and FileNet), Budgeting, Administration and ALM, Microsoft Architecture, Voice and Engineering, TAX Support Center (TSC) and Security planning and administration/ISO.

TAX request staff augmentation support for Taxation's Enterprise Applications and Systems:

## AR Environment:

Powerbuilder developer's requirements: developers with 10 + years of experience in the following: SQL, Object oriented software design and development, Powerbuilder version 10.5 or higher and Oracle Database version 10G. Functional and technical knowledge in designing, developing and maintaining TAX processing and revenue management system is highly preferred.

## eFile Developer:

Developer with 5+ years of development experience in the following: Oracle, XML, SOA, Visual Basic .net, Internet design and development, and knowledge of electronic tax return applications

#### Windows Engineer:

- Min 10 year work experience setting up, configuring, and troubleshooting Microsoft Windows Server 2008, and 2012
- Min 7 years experience with IIS configuration and administration
- Min 5 year work experience with SMS

#### Security Administration requirements:

- Active Directory Administration Experience (prefer 3-4 years of experience)
- Candidate should have experience administering NTFS files system access privileges (prefer 3-4 years of experience)
- Working knowledge of Windows 7 Operating System
- Candidate will need to have the ability to help create documentation and, thus, experience utilizing Microsoft Office.
- Since this person will be communicating directly with the user population, communicating user account credentials and possibly troubleshooting issues with those credentials, this person would need to have outstanding customer service skills.
- Candidate should possess strong problems solving and analytical skills.
- Other skills that will be necessary, we can train in-house.

#### VTOL:

- Developers with 4 + years of project management experience
- In-depth knowledge of web site design concepts
- Possesses strong analytical skills for assessing cause and effect relationships
- Demonstrates resourcefulness in compiling presentations and reports
- Adapts easily in interpersonal situations
- 5+ years web development experience in Java J2EE version 1.4 or higher
- 5+ years development experience using JBoss Enterprise Application server version 4.1 or Weblogic version 9 or higher or Websphere version 6 or higher

- 3+ years development experience using Seam and/or Hibernate - 3 or more years of web development experience
- 5+ years development experience with Oracle version 10g or higher
- 5+ years development experience using SQL and PL/SQL Functional and technical knowledge in designing, developing and maintaining TAX processing and revenue management system is highly preferred

#### TACS/KFI

- Min 1 year work experience setting up and configuring MS Windows Server 2008 and 2012
- Min 1 year work experience with Oracle 12c
- Min 1 year work experience with Sql Server 2012
- Min 1 year work experience with Visual Basic scripting
- Min 1 year work experience with Service Oriented Architecture
- Min 1 year work experience within .Net framework (minimum 3.5 version and higher)
- Min 1 year work experience with Visual Studio 2013
- Min 1 year work experience with PL/SQL or Oracle SQL Developer
- Min 1 year work experience with XML
- Work experience and knowledge of COM architecture (registering and un-registering DLLs)

#### Filenet:

- Filenet Certified Professional:
- Candidate must be a Filenet Certified Professional – Image Manager (Image Services) as Administrator and Product Technical Support, with a minimum of 10 years of work experience as a Filenet System Administrator who has been responsible for maintaining, upgrading and providing support of large, mission critical Filenet Image Services Systems.
- Candidate must be employed by a current IBM Filenet Software ValueNet Support Provider 2
- Candidate must have demonstrated experience upgrading Filenet Image Services V4.2 or higher to P8 on a Windows/UNIX / Oracle based platform. This includes interfacing with Oracle DBAs who are responsible for upgrading and migrating the databases and interfacing with UNIX administrators who were responsible for upgrading the Operating System of server hardware hosting Image Services in both

instances; an upgrade on existing server hardware and an upgrade on new server hardware. At this given time, it is uncertain of the migration path VATAX will undertake.

· Candidate must have performed (independently or functioned as essential personnel) on a minimum of two Image Services System upgrades for one Filenet Image Services upgrade instance. This should include a development or test environment and a production environment. The production environment must have been for a large Image Services MSAR Repository of over 8 Terabytes.

· Candidate must have demonstrated experience installing, configuring and testing Filenet Capture Fax Entry V 5.X or higher integrated with Image Services 4.2.0 and Right Fax software. VATAX supports Filenet's inbound faxing capability via a FAX Server which will be upgraded to include new versions of Filenet Capture Fax Entry and RightFax which will integrate with Image Services 4.2.0. A RightFax vendor will also be assisting VATAX with this upgrade.

· Candidate must have 3+ years experience training and/or mentoring staff for Filenet System Administration of Image Services 4.2 (Basic to Advanced), Filenet Capture Fax Entry 5.X. Experience relevant to these topics should be evidenced: o Identify and discuss Image Services and Capture architecture, services, processes and hardware component integration.

1. Configuration of Image Services and Capture and its impact on product's Performance

2. Application Management

3. Troubleshooting/Resolution Management – Network vs. Image Services configuration

4. Systems Performance Monitoring

5. Disaster Planning and Recovery and Backups

6. Storage Management

7. Generating "health check" reports and interpretation of these reports for additional tuning of Image Services

TFS/ALM:

Agile Coach with 5 years work experience implementing Agile development methodology, practices and standards to include but not limited to enterprise reporting and work prioritization.

Automated Testing- Solutions Architect:

Architect with 3-5 years (or more) of solid experience with application testing tools/techniques must be able to assist in architecting an overall application testing solution.

Multiple years experience with application testing, in general, and at least some direct experience with the use of automated testing tools.

Familiarity with standard application life-cycle management practices is required. Assisting in defining the testing strategy and mentoring/training others on industry-standard-best-practice testing techniques is required.

The candidate must have excellent analytical, communication, and documentation skills and must be comfortable working with people of all experience levels, from end-users

TSC:

Considerable knowledge of Microsoft Operating systems; Windows 7 and Windows 10; Working knowledge of MS Office, Outlook .

Considerable knowledge of pc hardware, peripherals & networks

Ability to use software tools (dameware etc) to remotely connect to workstations.

Excellent troubleshooting skills

Ability to perform software installations, configurations and troubleshooting hardware and software.

Customer service oriented..

Excellent organizational skills

Excellent communication skills

Excellent troubleshooting and analytical skills.

Ability to multi-task.

## **BReT Jboss Upgrade**

<b>BRT Type:</b>	Business Requirement for Existing Technology
<b>Date Submitted:</b>	9/15/2014

<b>Mandate:</b>	No
<b>Mission Critical:</b>	Yes
<b>Description:</b>	
<p>This project is required to ensure the continued support of VTOL Applications. The Jboss upgrade project involves upgrading Java and JBoss from version 4.3 to 6.2. Unlike the typical upgrade this JBoss upgrade requires a partial rewrite of the VTOL applications: Internet File (iFile), Internet Registration (iReg), Quickpay, Non profit Organization (NPO) and External Entity Secure Message Center (EESMC). This upgrade is necessary because about 80% of the JBoss V4.3 features such as methods, functions, and classes are not supported in V6.2 which is a risk to the continuity of operation for these VTOL applications.</p> <p>Business Requirements:</p> <ul style="list-style-type: none"> <li>- Ensure VTOL applications are on vendor supported platforms</li> <li>- Ensure TAX applications are compliant with the Commonwealth's security standards</li> <li>- Provide the capability to secure and protect sensitive information</li> </ul>	
<b>BReT Sailpoint Identity and Access Management Services</b>	
<b>BRT Type:</b>	Business Requirement for Existing Technology
<b>Date Submitted:</b>	8/24/2017
<b>Mandate:</b>	No
<b>Mission Critical:</b>	No
<b>Description:</b>	
<p>Virginia Tax implemented a new Identity and Access Management (IAM) system in fall of 2016 in order to address a security gap between access that was approved and the actual access that was provisioned. SailPoint is the new IAM system and it has dramatically improved Virginia Tax's capability to understand precisely what privileges each user of the Agency's sensitive systems have. SailPoint is significantly better than the previous system because it fully integrates with the backend systems allowing Management, Security, and Internal Audit to see all privileges associated with any given identity. The tool allows for auto provisioning and de-provisioning of systems access ensuring that the exact privileges are granted or removed. In order to meet some very aggressive timelines the SailPoint implementation team was required to integrate with all sensitive systems in one large implementation. When SailPoint was fully integrated into the TAX systems the team determined that there are over 22,000 total possible entitlements available for the systems. Of these 22,000 entitlements only approximately 8,000 of them are utilized. The team has been diligently working to cleanup from the implementation but it is a significant scope of work that is forecasted to take multiple man years given the current resources assigned to the project. The Agency operational areas are requesting Business Roles to be developed so that users in the same position can be granted the same access to multiple systems with a single role. In order to implement business roles the system entitlements and IT roles need to be verified and cleaned.</p> <p>Im order to address the systems access cleanup and further secure the Virginia Tax sensitive systems TAX request approval to utilize professional consulting services to assist and guide the ongoing phases of developing a mature Identity and Access Management program.</p>	
<b>BReT Single Signon</b>	
<b>BRT Type:</b>	Business Requirement for Existing Technology
<b>Date Submitted:</b>	9/15/2014
<b>Mandate:</b>	No

<b>Mission Critical:</b>	Yes
<b>Description:</b>	
TAX plans to consolidate its legacy Single Sign On application that is currently built on Visual Basic Version 6 architecture to a .NET application	
Requirements:	
o Re-architect the Integrated Revenue Management System Single Sign On application to a modern platform	
o Utilize modern LDAP, Kerberos, or NTLM authentication to utilize Active Directory Services	
o Implement a two factor authentication to secure TAX's most critical data.	
<b>BReT TaxWeb Redesign</b>	
<b>BRT Type:</b>	Business Requirement for Existing Technology
<b>Date Submitted:</b>	9/15/2014
<b>Mandate:</b>	No
<b>Mission Critical:</b>	Yes
<b>Description:</b>	
TAX currently has a comprehensive Web site for taxpayers to utilize to get needed information and perform various functions to exchange information with the agency. Whereas the current Web application has served us well, it is becoming somewhat outdated and needs to have functionality added to further increase the ability of taxpayers to interact electronically with Tax.	
Requirements:	
o Redesign the Tax Web application to make it more efficient and effective	
o Add new functionality to increase the ability of taxpayers to interact electronically with Tax	
<b>BReT Vendor Treasury Offset Program</b>	
<b>BRT Type:</b>	Business Requirement for Existing Technology
<b>Date Submitted:</b>	9/15/2014
<b>Mandate:</b>	No
<b>Mission Critical:</b>	Yes
<b>Description:</b>	
The Department of Taxation requests approval to enter into a Staff Augmentation contract for developers to assist the Office of Technology with making the required changes to its core applications in support of the Vendor Treasury Offset Program. As a result of these changes, TAX will refer non-income debts for vendor payment offsets and taxpayer refunds to Treasury Offset Programs (TOPs)	
<b>BReT VITA Transition Support-FY17/18</b>	
<b>BRT Type:</b>	Business Requirement for Existing Technology
<b>Date Submitted:</b>	6/15/2016
<b>Mandate:</b>	No

**Mission Critical:** Yes

**Description:**

The Department of Taxation requests approval to enter into a Staff Augmentation contract for consultants to provide support to perform required systems and infrastructure activities to facilitate TAX's participation in the Commonwealth's enterprise infrastructure transition. These resources will perform maintenance and enhancement to support TAX's systems as well as provide the required expertise to ensure TAX can be an early adopter in support of the Commonwealth's transition efforts. These resources will also assist with implementing legislative changes, routine maintenance, and systems enhancements aimed at operational efficiency, cost savings, cost avoidance, and improved customer service.

System maintenance requirements:

1. Ensure TAX applications are performing to the functional detail requirements in support of daily business operation
2. Ensure TAX application are available per the business needs
3. Ensure TAX applications are patched and upgraded to ensure continued vendor support and adequate security

System enhancements requirements:

1. Ensure improved worker productivity and make TAX employment attractive to future workforce
2. Ensure TAX applications are performing to the requirement of TAX and the Commonwealth's strategic direction
3. Improve information sharing to optimize current business functions
4. Expand the support of TAX applications and productivity tools that support the recommendations on streamlining government operations
5. Ensure programs and tools which enable all citizens to interact with TAX 24x7 – Safely and Securely

Mandated System enhancement requirements:

1. Ensure TAX applications are performing to state and federal mandated requirements
2. Ensure TAX applications are in compliance with security standards

Furthermore, this request is to provide administrative, security, application analysis, design and development support for IRMS via the following work areas: Advantage Revenue, VTOL (Virginia TAX Online), Report and interfaces, Unix and Database Administration, Siebel, and Return Reconstruction and Compliance Repository (CR), Processing (TACS/KFI and FileNet), Budgeting, Administration and ALM, Microsoft Architecture, Voice and Engineering, TAX Support Center (TSC) and Security planning and administration/ISO.

TAX request staff augmentation support for Taxation's Enterprise Applications and Systems:

AR Environment:

Powerbuilder developer's requirements: developers with 10 + years of experience in the following: SQL, Object oriented software design and development, Powerbuilder version 10.5 or higher and Oracle Database version 10G. Functional and technical knowledge in designing, developing and maintaining TAX processing and revenue management system is highly preferred.

eFile Developer:

Developer with 5+ years of development experience in the following: Oracle, XML, SOA, Visual Basic .net, Internet design and development, and knowledge of electronic tax return applications

Windows Engineer:

- Min 10 year work experience setting up, configuring, and troubleshooting Microsoft Windows Server 2008, and 2012
- Min 7 years experience with IIS configuration and administration
- Min 5 year work experience with SMS

Security Administration requirements:

- Active Directory Administration Experience (prefer 3-4 years of experience)
- Candidate should have experience administering NTFS files system access privileges (prefer 3-4 years of experience)
- Working knowledge of Windows 7 Operating System
- Candidate will need to have the ability to help create documentation and, thus, experience utilizing Microsoft Office.
- Since this person will be communicating directly with the user population, communicating user

account credentials and possibly troubleshooting issues with those credentials, this person would need to have outstanding customer service skills.

- Candidate should possess strong problems solving and analytical skills.
- Other skills that will be necessary, we can train in-house.

#### VTOL:

- Developers with 4 + years of project management experience
- In-depth knowledge of web site design concepts
- Possesses strong analytical skills for assessing cause and effect relationships
- Demonstrates resourcefulness in compiling presentations and reports
- Adapts easily in interpersonal situations
- 5+ years web development experience in Java J2EE version 1.4 or higher
- 5+ years development experience using JBoss Enterprise Application server version 4.1 or

Weblogic version 9 or higher or Websphere version 6 or higher

- 3+ years development experience using Seam and/or Hibernate - 3 or more years of web development experience

- 5+ years development experience with Oracle version 12c

5+ years development experience using SQL and PL/SQL Functional and technical knowledge in designing, developing and maintaining TAX processing and revenue management system is highly preferred

#### TACS/KFI

- Min 1 year work experience setting up and configuring MS Windows Server 2008 and 2012
- Min 1 year work experience with Oracle 12c
- Min 1 year work experience with Sql Server 2012
- Min 1 year work experience with Visual Basic scripting
- Min 1 year work experience with Service Oriented Architecture
- Min 1 year work experience within .Net framework (minimum 3.5 version and higher)
- Min 1 year work experience with Visual Studio 2013
- Min 1 year work experience with PL/SQL or Oracle SQL Developer
- Min 1 year work experience with XML
- Work experience and knowledge of COM architecture (registering and un-registering DLLs)

#### Filenet:

- Filenet Certified Professional:

· Candidate must be a Filenet Certified Professional – Image Manager (Image Services) as Administrator and Product Technical Support, with a minimum of 10 years of work experience as a Filenet System Administrator who has been responsible for maintaining, upgrading and providing support of large, mission critical Filenet Image Services Systems.

- Candidate must be employed by a current IBM Filenet Software ValueNet Support Provider 2

· Candidate must have demonstrated experience upgrading Filenet Image Services V4.2 or higher to P8 on a Windows/UNIX / Oracle based platform. This includes interfacing with Oracle DBAs who are responsible for upgrading and migrating the databases and interfacing with UNIX administrators who were responsible for upgrading the Operating System of server hardware hosting Image Services in both instances; an upgrade on existing server hardware and an upgrade on new server hardware. At this given time, it is uncertain of the migration path VATAX will undertake.

- Candidate must have performed (independently or functioned as essential personnel) on a minimum of two Image Services System upgrades for one Filenet Image Services upgrade instance. This should include a development or test environment and a production environment. The production environment must have been for a large Image Services MSAR Repository of over 8 Terabytes.

· Candidate must have demonstrated experience installing, configuring and testing Filenet Capture Fax Entry V 5.X or higher integrated with Image Services 4.2.0 and Right Fax software. VATAX supports Filenet's inbound faxing capability via a FAX Server which will be upgraded to include new versions of Filenet Capture Fax Entry and RightFax which will integrate with Image Services 4.2.0. A RightFax vendor will also be assisting VATAX with this upgrade.

- Candidate must have 3+ years experience training and/or mentoring staff for Filenet System Administration of Image Services 4.2 (Basic to Advanced), Filenet Capture Fax Entry 5.X. Experience relevant to these topics should be evidenced: o Identify and discuss Image Services and Capture architecture, services, processes and hardware component integration.

1. Configuration of Image Services and Capture and its impact on product's Performance
2. Application Management
3. Troubleshooting/Resolution Management – Network vs. Image Services configuration
4. Systems Performance Monitoring
5. Disaster Planning and Recovery and Backups
6. Storage Management
7. Generating “health check” reports and interpretation of these reports for additional tuning of Image Services

TFS/ALM:

Agile Coach with 5 years work experience implementing Agile development methodology, practices and standards to include but not limited to enterprise reporting and work prioritization.

Automated Testing- Solutions Architect:

Architect with 3-5 years (or more) of solid experience with application testing tools/techniques must be able to assist in architecting an overall application testing solution.

Multiple years experience with application testing, in general, and at least some direct experience with the use of automated testing tools.

Familiarity with standard application life-cycle management practices is required. Assisting in defining the testing strategy and mentoring/training others on industry-standard-best-practice testing techniques is required.

The candidate must have excellent analytical, communication, and documentation skills and must be comfortable working with people of all experience levels, from end-users

TSC:

Considerable knowledge of Microsoft Operating systems; Windows 7 and Windows 10; Working knowledge of MS Office, Outlook .

Considerable knowledge of pc hardware, peripherals & networks

Ability to use software tools (dameware etc) to remotely connect to workstations.

Excellent troubleshooting skills

Ability to perform software installations, configurations and troubleshooting hardware and software.

Customer service oriented..

Excellent organizational skills

Excellent communication skills

Excellent troubleshooting and analytical skills.

Ability to multi-task.

**BRet VITA Transition Support-FY18/22**

<b>BRT Type:</b>	Business Requirement for Existing Technology
<b>Date Submitted:</b>	8/24/2017
<b>Mandate:</b>	No
<b>Mission Critical:</b>	Yes

**Description:**

The Department of Taxation requests approval to allocate TAX staff and enter into a Staff Augmentation contract for developers to perform maintenance and enhancement support TAX Integrated Revenue Management System (IRMS). These resources will also assist with implementing legislative changes, routine maintenance, and systems enhancements aimed at operational efficiency, cost savings, cost avoidance, and improved customer service.

System maintenance requirements:

1. Ensure TAX applications are performing to the functional detail requirements in support of daily business operation
2. Ensure TAX application are available per the business needs

3. Ensure TAX applications are patched and upgraded to ensure continued vendor support and adequate security

System enhancements requirements:

1. Ensure improved worker productivity and make TAX employment attractive to future workforce
  2. Ensure TAX applications are performing to the requirement of TAX and the Commonwealth's strategic direction
  3. Improve information sharing to optimize current business functions
  4. Expand the support of TAX applications and productivity tools that support the recommendations on streamlining government operations
  5. Ensure programs and tools which enable all citizens to interact with TAX 24x7 – Safely and Securely
- Mandated System enhancement requirements:
1. Ensure TAX applications are performing to state and federal mandated requirements
  2. Ensure TAX applications are in compliance with security standards

Furthermore, this request is to provide administrative, security, application analysis, design and development support for IRMS via the following work areas: Advantage Revenue, VTOL (Virginia TAX Online), Report and interfaces, Unix and Database Administration, Siebel, and Return Reconstruction and Compliance Repository (CR), Processing (TACS/KFI and Filenet), Budgeting, Administration and ALM, Microsoft Architecture, Voice and Engineering, TAX Support Center (TSC) and Security planning and administration/ISO.

TAX request staff augmentation support for Taxation's Enterprise Applications and Systems:

AR Environment:

Powerbuilder developer's requirements: developers with 10 + years of experience in the following: SQL, Object oriented software design and development, Powerbuilder version 10.5 or higher and Oracle Database version 10G. Functional and technical knowledge in designing, developing and maintaining TAX processing and revenue management system is highly preferred.

eFile Developer:

Developer with 5+ years of development experience in the following: Oracle, XML, SOA, Visual Basic .net, Internet design and development, and knowledge of electronic tax return applications

Windows Engineer:

- Min 10 year work experience setting up, configuring, and troubleshooting Microsoft Windows Server 2008, and 2012
- Min 7 years experience with IIS configuration and administration
- Min 5 year work experience with SMS

Security Administration requirements:

- Active Directory Administration Experience (prefer 3-4 years of experience)
- Candidate should have experience administering NTFS files system access privileges (prefer 3-4 years of experience)
- Working knowledge of Windows 7/10 Operating System
- Candidate will need to have the ability to help create documentation and, thus, experience utilizing Microsoft Office.
- Since this person will be communicating directly with the user population, communicating user account credentials and possibly troubleshooting issues with those credentials, this person would need to have outstanding customer service skills.
- Candidate should possess strong problems solving and analytical skills.
- Other skills that will be necessary, we can train in-house.

VTOL:

- Developers with 4 + years of project management experience
- In-depth knowledge of web site design concepts
- Possesses strong analytical skills for assessing cause and effect relationships
- Demonstrates resourcefulness in compiling presentations and reports
- Adapts easily in interpersonal situations

- 5+ years web development experience in Java J2EE version 1.4 or higher
  - 5+ years development experience using JBoss Enterprise Application server version 4.1 or Weblogic version 9 or higher or Websphere version 6 or higher
  - 3+ years development experience using Seam and/or Hibernate - 3 or more years of web development experience
  - 3+ years development experience with Oracle version 12c or higher
  - 5+ years development experience using SQL and PL/SQL Functional and technical knowledge in designing, developing and maintaining TAX processing and revenue management system is highly preferred
- TACS/KFI

- Min 1 year work experience setting up and configuring MS Windows Server 2008 and 2012
- Min 1 year work experience with Oracle 12c
- Min 1 year work experience with Sql Server 2012
- Min 1 year work experience with Visual Basic scripting
- Min 1 year work experience with Service Oriented Architecture
- Min 1 year work experience within .Net framework (minimum 3.5 version and higher)
- Min 1 year work experience with Visual Studio 2015

n upgrade on existing server hardware and an upgrade on new server hardware. At this given time, it is uncertain of the migration path VATAX will undertake.

· Candidate must have performed (independently or functioned as essential personnel) on a minimum of two Image Services System upgrades for one Filenet Image Services upgrade instance. This should include a development or test environment and a production environment. The production environment must have been for a large Image Services MSAR Repository of over 8 Terabytes.

· Candidate must have demonstrated experience installing, configuring and testing Filenet Capture Fax Entry V 5.X or higher integrated with Filenet p8 and Right Fax software. VATAX supports Filenet's inbound faxing capability via a FAX Server which will be upgraded to include new versions of Filenet Capture Fax Entry and RightFax which will integrate with Filenet p8. A RightFax vendor will also be assisting VATAX with this upgrade.

· Candidate must have 3+ years experience training and/or mentoring staff for Filenet (FN) System Administration of FN p8 (Basic to Advanced), Filenet Capture Fax Entry 5.X. Experience relevant to these topics should be evidenced:

1. Configuration of FN p8 and Capture and its impact on product's Performance
2. Application Management
3. Troubleshooting/Resolution Management – Network vs. Image Services configuration
4. Systems Performance Monitoring
5. Disaster Planning and Recovery and Backups
6. Storage Management
7. Generating "health check" reports and interpretation of these reports for additional tuning of Image Services

TFS/ALM:

Agile Coach with 5 years work experience implementing Agile development methodology, practices and standards to include but not limited to enterprise reporting and work prioritization.

Automated Testing- Engineers/ Architect:

Architect with 3-5 years (or more) of solid experience with application testing tools/techniques must be able to assist in architecting an overall application testing solution.

Multiple years experience with application testing, in general, and at least some direct experience with the use of automated testing tools.

Familiarity with standard application life-cycle management practices is required. Assisting in defining the testing strategy and mentoring/training others on industry-standard-best-practice testing techniques is required.

The candidate must have excellent analytical, communication, and documentation skills and must be comfortable working with people of all experience levels, from end-users

TSC:

Considerable knowledge of Microsoft Operating systems; Windows 7 and Windows 10; Working knowledge of MS Office, Outlook .

Considerable knowledge of pc hardware, peripherals & networks  
 Ability to use software tools (dameware etc) to remotely connect to workstations.  
 Excellent troubleshooting skills  
 Ability to perform software installations, configurations and troubleshooting hardware and software.  
 Customer service oriented..  
 Excellent organizational skills  
 Excellent communication skills  
 Excellent troubleshooting and analytical skills.  
 Ability to multi-task.

**BRnT Audit Case Management Mobile System**

<b>BRT Type:</b>	Business Requirement for New Technology
<b>Date Submitted:</b>	9/14/2014
<b>Mandate:</b>	No
<b>Mission Critical:</b>	Yes

**Description:**

The Case Management system will allow TAX field staff (auditors) to use tablets. The tablets would have an audit application that would replace Tax's existing audit case management and audit workbench applications. These existing applications are dated. Auditors could connect wherever a cell signal was available. The applications would have the ability to work disconnected in the event there is no cell signal available. The system will have the ability to accept a credit/debit card or electronic check, and the ability to exchange encrypted electronic documents with taxpayers. The system will integrate directly with Tax's core application Advantage Revenue (AR) so audit returns could be loaded automatically with the appropriate compliance code and no additional involvement by other staff.

As technology moves to more mobile platforms, TAX needs to enable systems to utilize and interface with them. This solution will allow TAX staff the use of a tablet and/or smart phone in the field to assist taxpayers with filing returns and paying their taxes. The field rep would pull out their smart device and file the returns electronically, with the use of a Square which is an electronic device that is attached to a tablet or Smartphone that can process credit card payments. The rep will be able to take the payment electronically and have the confirmation of the filing and the payment emailed to the taxpayer. This presents an opportunity for educating the taxpayer and achieving the Commonwealth/TAX goals for electronic filing and payment. This is more secure for taxpayers and would decrease paperwork for the customers and the agent, thereby saving the customer and TAX time and money because funds will be processed to the bank more efficiently, with no delays or costs for mailing and there is no paper return or check process.

**BRnT Cobol Migration to Java**

<b>BRT Type:</b>	Business Requirement for New Technology
<b>Date Submitted:</b>	9/15/2014
<b>Mandate:</b>	No
<b>Mission Critical:</b>	Yes

**Description:**

Cobol migration to Java involves a complete rewrite of COBOL programs to Java. Currently the IRMS Advantage Revenue application contains a total of 38 COBOL programs. The purpose of this project is to rewrite AR Cobol batch jobs in JAVA using the Spring Batch framework.

Requirements:

- o Provide cost saving and avoidance for the Commonwealth by eliminating the need for Cobol licenses
- o Save hardware costs by reducing the number of AR batch servers.
- o Ensure process scalability to improve performance during peak times
- o Ensure the framework is reusable to support shorter implementation times
- o Ensure the ability to maintain staffing, since Java skills are readily available and are not as scarce as COBOL skills.
- o Provide the ability to support resource retooling and retention. Learning a new technology increases leverage and motivation to Cobol and PowerBuilder developers.

**BRnT eGovernment Self Help Expansion (My Virginia TAX)**

<b>BRT Type:</b>	Business Requirement for New Technology
<b>Date Submitted:</b>	9/14/2014
<b>Mandate:</b>	No
<b>Mission Critical:</b>	Yes

**Description:**

My Virginia TAX is the Department's version of "My Account" which will allow taxpayers (individuals and businesses) to access their data/information online with the use of a more robust single sign-on/ authentication portal with security questions to allow for self-service when they forget their password.

Today TAX maintains multiple systems with multiple Login entry points. Taxpayers have long complained about not being able to go to one place on our website to access our online systems. The My Virginia TAX concept would include an improved version of the functionality we provide today, as well as provide new functionality that is not there today. Taxpayers would be able to electronically file and pay any tax. Taxpayers would be able to access a complete history of their account including past filings, payments made, refunds issued (including Where's My Refund status while pending), correspondence that was sent assessments/bills pending (and paid).

**BRnT- Improved Security of Taxpayer Data and Agency Applications**

<b>BRT Type:</b>	Business Requirement for New Technology
<b>Date Submitted:</b>	5/14/2015
<b>Mandate:</b>	No
<b>Mission Critical:</b>	Yes

**Description:**

TAX requires approval to procure the following software products to ensure additional security of Taxpayer Data (TAX assumes the vendor will provide and install the software):

- Risk Assessment – A risk management platform to properly assess and report on agency security risks
- User Provision Software – While the Agency has a tool for tracking access to various systems – it is a tracking tool, not an enforcement tool. The Commonwealth's new Security Standards require reporting on access levels, immediate revocation of access as needed, etc. This request will provide software that not only tracks access, but assist with granting and terminating access, access reconciliations, reporting,

and ensuring proper protocol has been followed.

#### **BRnT Security Initiatives**

**BRT Type:** Business Requirement for New Technology

**Date Submitted:** 9/15/2014

**Mandate:** No

**Mission Critical:**

**Description:**

TAX requires approval to augment staff and procure additional security software products to ensure enhanced security of taxpayer data. This request will provide software and staff that will not only track access, but assist with granting and terminating access, access reconciliations, reporting, and ensuring proper protocol has been followed when utilizing/consuming taxpayer data.

#### **End of Life 2008 Server**

**BRT Type:** Business Requirement for Existing Technology

**Date Submitted:** 8/30/2017

**Mandate:** Yes

**Mission Critical:** Yes

**Description:**

Agency will create a mitigation plan to address end of life 2008 servers. TAX will develop a plan to migrate all windows 2008 server to windows 2012 or higher before the servers reach end of life. In the event a server cannot be migrated, TAX will request an exception. To be successful, this effort will require timely provisioning of new servers by the service provider.

#### **TAX IT Sourcing BReT**

**BRT Type:** Business Requirement for Existing Technology

**Date Submitted:** 9/23/2016

**Mandate:** No

**Mission Critical:** Yes

**Description:**

The Commonwealth is transitioning to a multi-supplier model for IT Infrastructure. This BRT outlines the infrastructure the agency will need to plan and test in support of the transition.

**Messaging:**

VITA is initiating disentanglement from NG messaging services in 2016. Messaging Services for email, enterprise collaboration services, and mobile device management are required for upwards of 1,000 users in our agency. We also have multiple applications that have hooks into messaging services which will need to be tested. Workplace Collaboration Services (VITA provided SharePoint), TAX does not use WCS SharePoint. We have 0 (no) applications serviced via AirWatch which will need remediation.

IBM Mainframe: Does not apply

Server/storage (including housing of equipment):

VITA is initiating disentanglement from NG servers and storage. TAX has 324 servers (including DR) which will need to be migrated and tested during this transition. More than 140 application/software will be affected by this move and will need to be tested.

Authentication/directory services:

TAX has more than 170 (server and desktop) application/software which will need to be migrated and tested during the authentication/directory services transition. The number of users (internal and external) is 800 internal and 200 external.

End user computing:

TAX has 541 desktops and 800 laptops and 51 network printers which will need to be migrated.

Data networks:

TAX 1 network in Danville that is ERCS not MPLS which will need to be migrated.

Voice Networks: Does not apply

Cloud Computing:

TAX is investigating moving TBD number of applications to a Cloud services vendor. The business reason for the move is to reduce costs; increase efficiencies; and reduce IT agency footprint. Current applications are not cloud ready. The Agency will need to bring in outside consulting services to assess what needs to be done to applications and supporting infrastructure in order to become cloud ready.

Security Services:

To meet Commonwealth Security requirements, TAX will procure outside security services from an outside vendor utilizing DPB funds.

Internet Usage:

TAX projects that internet usage will increase by ~50% due to migration to cloud services for Mail, Collaboration, and storage. Some examples of why internet usage might increase are as follows: an increase use of video streaming, an increase in user access to the internet, etc.

Report Title: Appendix A 18 - 20 Report

Agency: Department of Taxation (TAX)

Agency Head Approval:

No

<b>Budget Category: Major Projects</b>				
<b>Audit Case Management Mobile System</b>				
<b>Appropriation Act/Funding Status</b>			<b>Investment Business Case Approval - Partially Funded GF</b>	
<p>The Case Management system will allow TAX field staff (auditors) to use tablets. The tablets would have an audit application that would replace Tax's existing audit case management and audit workbench applications. These existing applications are dated. Auditors could connect wherever a cell signal was available. The applications would have the ability to work disconnected in the event there is no cell signal available. The system will have the ability to accept a credit/debit card or electronic check, and the ability to exchange encrypted electronic documents with taxpayers. The system will integrate directly with Tax's core application Advantage Revenue (AR) so audit returns could be loaded automatically with the appropriate compliance code and no additional involvement by other staff. As technology moves to more mobile platforms, TAX needs to enable systems to utilize and interface with them. This solution will allow TAX staff the use of a tablet and/or smart phone in the field to assist taxpayers with filing returns and paying their taxes. The field rep would pull out their smart device and file the returns electronically, with the use of a Square which is an electronic device that is attached to a tablet or Smart phone that can process credit card payments. The rep will be able to take the payment electronically and have the confirmation of the filing and the payment emailed to the taxpayer. This presents an opportunity for educating the taxpayer and achieving the Commonwealth/TAX goals for electronic filing and payment. This is more secure for taxpayers and would decrease paperwork for the customers and the agent, thereby saving the customer and TAX time and money because funds will be processed to the bank more efficiently, with no delays or costs for mailing and there is no paper return or check process.</p> <p>The purpose of the proposed Field Audit mobile application is to attempt to consolidate all audit case management applications into a single system utilized by all of the Tax auditors. However, if this objective of a single system is not feasible, Tax still needs to replace the Field audit software with a single up-to-date mobile system. It would eliminate the field audit's multiple pieces of technology with a single new and fully supported system. The mobile application would have connectivity and integration with the agency core applications; therefore the auditors would have the capability to synchronize their lap-top case data with the server case data when connected to the server, saving time on downloading and reconciliation. Security would also improve since, after completion of the audit, the taxpayer data would be stored on agency servers instead of a laptop. The taxpayer data would be at less risk should a laptop be damaged, lost or stolen.</p>				
Planned project start date:	11/30/2015	Planned project end date:	6/30/2019	
PPEA Involvement:	No			
<b>Estimated Costs:</b>	<b>Total</b>	<b>General Fund</b>	<b>Nongeneral Fund</b>	
Project Cost (estimate at completion):	\$3,039,850	\$3,039,850	\$0	
Estimated project expenditures first	\$1,539,850	\$1,539,850	\$0	

year of biennium:				
Estimated project expenditures second year of biennium:	\$0	\$0	\$0	
<b>Funding Required:</b>				
	<b>Total</b>	<b>General</b>	<b>Nongeneral</b>	
Funding required for first year of biennium:	\$0	\$0	\$0	
Funding required for second year of biennium	\$0	\$0	\$0	
<b>Service Area</b>			<b>Weight</b>	
161 TAX 73217 Customer Services			Primary	
161 TAX 73219 Compliance Collections			Primary	
161 TAX 73214 Tax Return Processing			Secondary	
<b>Project Related Procurements</b>				
Audit Case Management Mobile System- Procurement				
Procurement Description:	<p>The Case Management system will allow TAX field staff (auditors) to use tablets. The tablets would have an audit application that would replace Tax's existing audit case management and audit workbench applications. These existing applications are dated. Auditors could connect wherever a cell signal was available. The applications would have the ability to work disconnected in the event there is no cell signal available. The system will have the ability to accept a credit/debit card or electronic check, and the ability to exchange encrypted electronic documents with taxpayers. The system will integrate directly with Tax's core application Advantage Revenue (AR) so audit returns could be loaded automatically with the appropriate compliance code and no additional involvement by other staff.</p> <p>As technology moves to more mobile platforms, TAX needs to enable systems to utilize and interface with them. This solution will allow TAX staff the use of a tablet and/or smart phone in the field to assist taxpayers with filing returns and paying their taxes. The field rep would pull out their smart device and file the returns electronically, with the use of a Square which is an electronic device that is attached to a tablet or Smartphone that can process credit card payments. The rep will be able to take the payment electronically and have the confirmation of the filing and the payment emailed to the taxpayer. This presents an opportunity for educating the taxpayer and achieving the Commonwealth/TAX goals for electronic filing and payment. This is more secure for taxpayers and would decrease paperwork for the customers and the agent, thereby saving the customer and TAX time and money because funds will be processed to the bank more efficiently, with no delays or costs for mailing and there is no paper return or check process.</p>			
Planned Delivery Date:	6/30/2019			
<b>eGovernment Self Help Expansion My Virginia TAX</b>				
<b>Appropriation Act/Funding Status</b>			<b>Investment Business Case Approval - Partially Funded GF</b>	

My Virginia TAX is the Department's version of "My Account" which will allow taxpayers (individuals and businesses) to access their data/information online with the use of a more robust single sign-on/ authentication portal with security questions to allow for self-service when they forget their password. Today TAX maintains multiple systems with multiple Login entry points. Taxpayers have long complained about not being able to go to one place on our website to access our online systems. The My Virginia TAX concept would include an improved version of the functionality we provide today, as well as provide new functionality that is not there today. Taxpayers would be able to electronically file and pay any tax. Taxpayers would be able to access a complete history of their account including past filings, payments made, refunds issued (including Where's My Refund status while pending), correspondence that was sent assessments/bills pending (and paid).

Planned project start date:	3/1/2016	Planned project end date:	1/30/2019
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PPEA Involvement:	No
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Estimated Costs:	Total	General Fund	Nongeneral Fund
Project Cost (estimate at completion):	\$2,506,492	\$2,506,492	\$0
Estimated project expenditures first year of biennium:	\$1,000,000	\$1,000,000	\$0
Estimated project expenditures second year of biennium:	\$0	\$0	\$0

Funding Required:	Total	General	Nongeneral
Funding required for first year of biennium:	\$0	\$0	\$0
Funding required for second year of biennium	\$0	\$0	\$0

Service Area	Weight
161 TAX 73217 Customer Services	Primary
BRnT eGovernment Self Help Expansion (My Virginia TAX)	Primary
161 TAX 73219 Compliance Collections	Secondary

There are no procurements for this project.

## Budget Category: Non-Major Projects

### Cobol Migration to Java

<b>Appropriation Act/Funding Status</b>	<b>Investment Business Case Approval -</b>
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Currently the IRMS Advantage Revenue application contains a total of 38 COBOL programs. The purpose of this project is to rewrite AR Cobol batch jobs in JAVA using the Spring Batch framework. This migration will aid TAX's ability to maintain staffing, since Java skills are readily available, unlike Cobol.

Planned project start date:	6/1/2016	Planned project end date:	12/31/2018
PPEA Involvement:	No		
<b>Estimated Costs:</b>			
	<b>Total</b>	<b>General Fund</b>	<b>Nongeneral Fund</b>
Project Cost (estimate at completion):	\$980,550	\$980,550	\$0
Estimated project expenditures first year of biennium:	\$390,275	\$390,275	\$0
Estimated project expenditures second year of biennium:	\$0	\$0	\$0
<b>Funding Required:</b>			
	<b>Total</b>	<b>General</b>	<b>Nongeneral</b>
Funding required for first year of biennium:	\$0	\$0	\$0
Funding required for second year of biennium:	\$0	\$0	\$0
<b>Service Area</b>			<b>Weight</b>
BRnT Cobol Migration to Java			Primary
<b>Project Related Procurements</b>			
COBOL Migration to Java- Procurement			
Procurement Description:	Currently the IRMS Advantage Revenue application contains a total of 38 COBOL programs. The purpose of this project is to rewrite AR Cobol batch jobs in JAVA using the Spring Batch framework. This migration will aid TAX's ability to maintain staffing, since Java skills are readily available, unlike Cobol.		
Planned Delivery Date:	12/23/2015		
<b>Single Sign on</b>			
<b>Appropriation Act/Funding Status</b>		<b>Investment Business Case Approval -</b>	
TAX plans to consolidate its legacy Single Sign On application that is currently built on Visual Basic Version 6 architecture to a .NET application Requirements: o Re-architect the Integrated Revenue Management System Single Sign On application to a modern platform o Utilize modern LDAP, Kerberos, or NTLM authentication to utilize Active Directory Services o Implement a two factor authentication to secure TAX's most critical data.			
Planned project start date:	6/16/2017	Planned project end date:	9/28/2018
PPEA Involvement:	No		

<b>Estimated Costs:</b>	<b>Total</b>	<b>General Fund</b>	<b>Nongeneral Fund</b>	
Project Cost (estimate at completion):	\$262,000	\$262,000	\$0	
Estimated project expenditures first year of biennium:	\$162,000	\$162,000	\$0	
Estimated project expenditures second year of biennium:	\$0	\$0	\$0	
<b>Funding Required:</b>				
	<b>Total</b>	<b>General</b>	<b>Nongeneral</b>	
Funding required for first year of biennium:	\$0	\$0	\$0	
Funding required for second year of biennium:	\$0	\$0	\$0	
<b>Service Area</b>			<b>Weight</b>	
BReT Single Signon			Primary	
There are no procurements for this project.				
<b>Tax JBoss and VTOL Upgrade</b>				
<b>Appropriation Act/Funding Status</b>			<b>Project Initiation Approval -</b>	
This project is required to ensure the continued support of VTOL Applications. Unlike the typical upgrade this JBoss upgrade requires a partial rewrite of the VTOL applications: Internet File (iFile), Internet Registration (iReg), Quickpay, Non profit Organization (NPO) and External Entity Secure Message Center (EESMC). This upgrade is necessary because about 80% of the JBoss V4.3 features such as methods, functions, and classes are not supported in V6.2 which is a risk to the continuity of operation for these VTOL applications.				
Planned project start date:	2/9/2018	Planned project end date:	8/5/2019	
PPEA Involvement:	No			
<b>Estimated Costs:</b>				
	<b>Total</b>	<b>General Fund</b>	<b>Nongeneral Fund</b>	
Project Cost (estimate at completion):	\$998,552	\$999,200	\$0	
Estimated project expenditures first year of biennium:	\$0	\$0	\$0	
Estimated project expenditures second year of biennium:	\$0	\$0	\$0	

<b>Service Area</b>		<b>Weight</b>	
BReT Jboss Upgrade		Primary	
<b>Project Related Procurements</b>			
JBoss Upgrade PBA- Procurement			
Procurement Description:	This project is required to ensure the continued support of VTOL Applications. The Jboss upgrade project involves upgrading Java and JBoss from version 4.3 to 6.2. Unlike the typical upgrade this JBoss upgrade requires a partial rewrite of the VTOL applications: Internet File (iFile), Internet Registration (iReg), Quickpay, Non profit Organization (NPO) and External Entity Secure Message Center (EESMC). This upgrade is necessary because about 80% of the JBoss V4.3 features such as methods, functions, and classes are not supported in V6.2 which is a risk to the continuity of operation for these VTOL applications.		
Planned Delivery Date:	12/15/2015		

Report Title: Appendix A 18 - 20 Report

Agency: Department of Taxation (TAX)

Agency Head Approval:

No

## Stand Alone Major Procurements

<b>Procurement Name:</b>	<b>IRMS Maintenance and Enhancement Support - FY19/20</b>
Procurement Description:	<p>The Department of Taxation requests approval to allocate TAX staff and enter into a Staff Augmentation contract for developers to perform maintenance and enhancement support TAX Integrated Revenue Management System (IRMS). These resources will also assist with implementing legislative changes, routine maintenance, and systems enhancements aimed at operational efficiency, cost savings, cost avoidance, and improved customer service. System maintenance requirements: 1. Ensure TAX applications are performing to the functional detail requirements in support of daily business operation 2. Ensure TAX application are available per the business needs 3. Ensure TAX applications are patched and upgraded to ensure continued vendor support and adequate security System enhancements requirements: 1. Ensure improved worker productivity and make TAX employment attractive to future workforce 2. Ensure TAX applications are performing to the requirement of TAX and the Commonwealth's strategic direction 3. Improve information sharing to optimize current business functions 4. Expand the support of TAX applications and productivity tools that support the recommendations on streamlining government operations 5. Ensure programs and tools which enable all citizens to interact with TAX 24x7 – Safely and Securely Mandated System enhancement requirements: 1. Ensure TAX applications are performing to state and federal mandated requirements 2. Ensure TAX applications are in compliance with security standards Furthermore, this request is to provide administrative, security, application analysis, design and development support for IRMS via the following work areas: Advantage Revenue, VTOL (Virginia TAX Online), Report and interfaces, Unix and Database Administration, Siebel, and Return Reconstruction and Compliance Repository (CR), Processing (TACS/KFI and Filenet), Budgeting, Administration and ALM, Microsoft Architecture, Voice and Engineering, TAX Support Center (TSC) and Security planning and administration/ISO. TAX request staff augmentation support for Taxation's Enterprise Applications and Systems: AR Environment: Powerbuilder developer's requirements: developers with 10 + years of experience in the following: SQL, Object oriented software design and development, Powerbuilder version 10.5 or higher and Oracle Database version 10G. Functional and technical knowledge in designing, developing and maintaining TAX processing and revenue management system is highly preferred. eFile Developer: Developer with 5+ years of development experience in the following: Oracle, XML, SOA, Visual Basic .net, Internet design and development, and knowledge of electronic tax return applications Windows Engineer: · Min 10 year work experience setting up, configuring, and troubleshooting Microsoft Windows Server 2008, and 2012 · · Min 7 years experience with IIS configuration and administration · Min 5 year work experience with SMS Security Administration requirements: · Active Directory Administration Experience (prefer 3-4 years of experience) · Candidate should have experience administering NTFS files system access privileges (prefer 3-4 years of experience) · Working knowledge of Windows 7/10 Operating System ·</p>

Candidate will need to have the ability to help create documentation and, thus, experience utilizing Microsoft Office. · Since this person will be communicating directly with the user population, communicating user account credentials and possibly troubleshooting issues with those credentials, this person would need to have outstanding customer service skills. · Candidate should possess strong problems solving and analytical skills. · Other skills that will be necessary, we can train in-house. VTOL: · Developers with 4 + years of project management experience · In-depth knowledge of web site design concepts · Possesses strong analytical skills for assessing cause and effect relationships · Demonstrates resourcefulness in compiling presentations and reports · Adapts easily in interpersonal situations · 5+ years web development experience in Java J2EE version 1.4 or higher · 5+ years development experience using JBoss Enterprise Application server version 4.1 or Weblogic version 9 or higher or Websphere version 6 or higher · 3+ years development experience using Seam and/or Hibernate - 3 or more years of web development experience · 3+ years development experience with Oracle version 12c or higher 5+ years development experience using SQL and PL/SQL Functional and technical knowledge in designing, developing and maintaining TAX processing and revenue management system is highly preferred TACS/KFI · Min 1 year work experience setting up and configuring MS Windows Server 2008 and 2012 · Min 1 year work experience with Oracle 12c · Min 1 year work experience with Sql Server 2012 · Min 1 year work experience with Visual Basic scripting · Min 1 year work experience with Service Oriented Architecture · Min 1 year work experience within .Net framework (minimum 3.5 version and higher) · Min 1 year work experience with Visual Studio 2015 n upgrade on existing server hardware and an upgrade on new server hardware. At this given time, it is uncertain of the migration path VATAX will undertake. · Candidate must have performed (independently or functioned as essential personnel) on a minimum of two Image Services System upgrades for one Filenet Image Services upgrade instance. This should include a development or test environment and a production environment. The production environment must have been for a large Image Services MSAR Repository of over 8 Terabytes. · · Candidate must have demonstrated experience installing, configuring and testing Filenet Capture Fax Entry V 5.X or higher integrated with Filenet p8 and Right Fax software. VATAX supports Filenet's inbound faxing capability via a FAX Server which will be upgraded to include new versions of Filenet Capture Fax Entry and RightFax which will integrate with Filenet p8. A RightFax vendor will also be assisting VATAX with this upgrade. · Candidate must have 3+ years experience training and/or mentoring staff for Filenet (FN) System Administration of FN p8 (Basic to Advanced), Filenet Capture Fax Entry 5.X. Experience relevant to these topics should be evidenced: o Identify and discuss Image Services and Capture architecture, services, processes and hardware component integration. 1. Configuration of FN p8 and Capture and its impact on product's Performance 2. Application Management 3. Troubleshooting/Resolution Management – Network vs. Image Services configuration 4. Systems Performance Monitoring 5. Disaster Planning and Recovery and Backups 6. Storage Management 7. Generating "health check" reports and interpretation of these reports for additional tuning of Image Services TFS/ALM: Agile Coach with 5 years work experience implementing Agile development methodology, practices and standards to include but not limited to enterprise reporting and work prioritization. Automated Testing- Engineers/ Architect: Architect with 3-5 years (or more) of solid experience with application testing tools/techniques must be able to assist in architecting an overall application testing solution. Multiple years experience with application testing, in general, and at least some direct experience with the use of automated testing tools. Familiarity with standard application life-cycle management practices is required.

<p>Assisting in defining the testing strategy and mentoring/training others on industry-standard-best-practice testing techniques is required. The candidate must have excellent analytical, communication, and documentation skills and must be comfortable working with people of all experience levels, from end-users TSC: Considerable knowledge of Microsoft Operating systems; Windows 7 and Windows 10; Working knowledge of MS Office, Outlook . Considerable knowledge of pc hardware, peripherals &amp; networks Ability to use software tools (dameware etc) to remotely connect to workstations. Excellent troubleshooting skills Ability to perform software installations, configurations and troubleshooting hardware and software. Customer service oriented.. Excellent organizational skills Excellent communication skills Excellent troubleshooting and analytical skills. Ability to multi-task.</p>			
Procurement Planned Start Date		Procurement Planned Completion Date	7/2/2018
		Appropriation Act Status	
<b>Service Area</b>			<b>Weight</b>
There are no service areas for this project.			
<b>Procurement Name:</b>	<b>Procurement IRMS Maintenance and Enhancement Support - FY17/18</b>		
Procurement Description:	<p>The Department of Taxation requests approval to allocate TAX staff and enter into a Staff Augmentation contract for developers to perform maintenance and enhancement support TAX Integrated Revenue Management System (IRMS). These resources will also assist with implementing legislative changes, routine maintenance, and systems enhancements aimed at operational efficiency, cost savings, cost avoidance, and improved customer service.</p> <p>System maintenance requirements:</p> <ol style="list-style-type: none"> <li>1. Ensure TAX applications are performing to the functional detail requirements in support of daily business operation</li> <li>2. Ensure TAX application are available per the business needs</li> <li>3. Ensure TAX applications are patched and upgraded to ensure continued vendor support and adequate security</li> </ol> <p>System enhancements requirements:</p> <ol style="list-style-type: none"> <li>1. Ensure improved worker productivity and make TAX employment attractive to future workforce</li> <li>2. Ensure TAX applications are performing to the requirement of TAX and the Commonwealth's strategic direction</li> <li>3. Improve information sharing to optimize current business functions</li> <li>4. Expand the support of TAX applications and productivity tools that support the recommendations on streamlining government operations</li> <li>5. Ensure programs and tools which enable all citizens to interact with TAX 24x7 – Safely and Securely</li> </ol> <p>Mandated System enhancement requirements:</p> <ol style="list-style-type: none"> <li>1. Ensure TAX applications are performing to state and federal mandated requirements</li> <li>2. Ensure TAX applications are in compliance with security standards</li> </ol> <p>Furthermore, this request is to provide administrative, security, application analysis, design and development support for IRMS via the following work areas: Advantage Revenue, VTOL (Virginia TAX Online), Report and interfaces, Unix and Database Administration, Siebel, and Return Reconstruction and Compliance Repository (CR), Processing (TACS/KFI</p>		

and Filenet), Budgeting, Administration and ALM, Microsoft Architecture, Voice and Engineering, TAX Support Center (TSC) and Security planning and administration/ISO.

TAX request staff augmentation support for Taxation's Enterprise Applications and Systems:

AR Environment:

Powerbuilder developer's requirements: developers with 10 + years of experience in the following: SQL, Object oriented software design and development, Powerbuilder version 10.5 or higher and Oracle Database version 10G. Functional and technical knowledge in designing, developing and maintaining TAX processing and revenue management system is highly preferred.

eFile Developer:

Developer with 5+ years of development experience in the following: Oracle, XML, SOA, Visual Basic .net, Internet design and development, and knowledge of electronic tax return applications

Windows Engineer:

- Min 10 year work experience setting up, configuring, and troubleshooting Microsoft Windows Server 2008, and 2012
- Min 7 years experience with IIS configuration and administration
- Min 5 year work experience with SMS

Security Administration requirements:

- Active Directory Administration Experience (prefer 3-4 years of experience)
- Candidate should have experience administering NTFS files system access privileges (prefer 3-4 years of experience)
- Working knowledge of Windows 7 Operating System
- Candidate will need to have the ability to help create documentation and, thus, experience utilizing Microsoft Office.
- Since this person will be communicating directly with the user population, communicating user account credentials and possibly troubleshooting issues with those credentials, this person would need to have outstanding customer service skills.
- Candidate should possess strong problems solving and analytical skills.
- Other skills that will be necessary, we can train in-house.

VTOL:

- Developers with 4 + years of project management experience
  - In-depth knowledge of web site design concepts
  - Possesses strong analytical skills for assessing cause and effect relationships
  - Demonstrates resourcefulness in compiling presentations and reports
  - Adapts easily in interpersonal situations
  - 5+ years web development experience in Java J2EE version 1.4 or higher
  - 5+ years development experience using JBoss Enterprise Application server version 4.1 or Weblogic version 9 or higher or Websphere version 6 or higher
  - 3+ years development experience using Seam and/or Hibernate - 3 or more years of web development experience
  - 5+ years development experience with Oracle version 10g or higher
  - 5+ years development experience using SQL and PL/SQL Functional and technical knowledge in designing, developing and maintaining TAX processing and revenue management system is highly preferred
- TACS/KFI

- Min 1 year work experience setting up and configuring MS Windows Server 2008 and 2012
- Min 1 year work experience with Oracle 12c
- Min 1 year work experience with Sql Server 2012
- Min 1 year work experience with Visual Basic scripting
- Min 1 year work experience with Service Oriented Architecture
- Min 1 year work experience within .Net framework (minimum 3.5 version and higher)
- Min 1 year work experience with Visual Studio 2013
- Min 1 year work experience with PL/SQL or Oracle SQL Developer
- Min 1 year work experience with XML
- Work experience and knowledge of COM architecture (registering and un-registering DLLs)

FileNet:

- FileNet Certified Professional:
  - Candidate must be a FileNet Certified Professional – Image Manager (Image Services) as Administrator and Product Technical Support, with a minimum of 10 years of work experience as a FileNet System Administrator who has been responsible for maintaining, upgrading and providing support of large, mission critical FileNet Image Services Systems.
  - Candidate must be employed by a current IBM FileNet Software ValueNet Support Provider 2
  - Candidate must have demonstrated experience upgrading FileNet Image Services V4.2 or higher to P8 on a Windows/UNIX / Oracle based platform. This includes interfacing with Oracle DBAs who are responsible for upgrading and migrating the databases and interfacing with UNIX administrators who were responsible for upgrading the Operating System of server hardware hosting Image Services in both instances; an upgrade on existing server hardware and an upgrade on new server hardware. At this given time, it is uncertain of the migration path VATAx will undertake.
  - Candidate must have performed (independently or functioned as essential personnel) on a minimum of two Image Services System upgrades for one FileNet Image Services upgrade instance. This should include a development or test environment and a production environment. The production environment must have been for a large Image Services MSAR Repository of over 8 Terabytes.
  - Candidate must have demonstrated experience installing, configuring and testing FileNet Capture Fax Entry V 5.X or higher integrated with Image Services 4.2.0 and Right Fax software. VATAx supports FileNet's inbound faxing capability via a FAX Server which will be upgraded to include new versions of FileNet Capture Fax Entry and RightFax which will integrate with Image Services 4.2.0. A RightFax vendor will also be assisting VATAx with this upgrade.
  - Candidate must have 3+ years experience training and/or mentoring staff for FileNet System Administration of Image Services 4.2 (Basic to Advanced), FileNet Capture Fax Entry 5.X. Experience relevant to these topics should be evidenced:
    - o Identify and discuss Image Services and Capture architecture, services, processes and hardware component integration.
    1. Configuration of Image Services and Capture and its impact on product's Performance
    2. Application Management
    3. Troubleshooting/Resolution Management – Network vs. Image Services configuration
    4. Systems Performance Monitoring
    5. Disaster Planning and Recovery and Backups
    6. Storage Management
    7. Generating "health check" reports and interpretation of these reports for additional tuning of Image Services

<p>TFS/ALM: Agile Coach with 5 years work experience implementing Agile development methodology, practices and standards to include but not limited to enterprise reporting and work prioritization.</p> <p>Automated Testing- Solutions Architect: Architect with 3-5 years (or more) of solid experience with application testing tools/techniques must be able to assist in architecting an overall application testing solution. Multiple years experience with application testing, in general, and at least some direct experience with the use of automated testing tools. Familiarity with standard application life-cycle management practices is required. Assisting in defining the testing strategy and mentoring/training others on industry-standard-best-practice testing techniques is required. The candidate must have excellent analytical, communication, and documentation skills and must be comfortable working with people of all experience levels, from end-users</p> <p>TSC: Considerable knowledge of Microsoft Operating systems; Windows 7 and Windows 10; Working knowledge of MS Office, Outlook . Considerable knowledge of pc hardware, peripherals &amp; networks Ability to use software tools (dameware etc) to remotely connect to workstations. Excellent troubleshooting skills Ability to perform software installations, configurations and troubleshooting hardware and software. Customer service oriented.. Excellent organizational skills Excellent communication skills Excellent troubleshooting and analytical skills. Ability to multi-task.</p>			
Procurement Planned Start Date		Procurement Planned Completion Date	7/1/2016
		Appropriation Act Status	
<b>Service Area</b>			<b>Weight</b>
There are no service areas for this project.			
<b>Procurement Name:</b>	<b>Security Initiatives FY19-22</b>		
Procurement Description:	TAX requires approval to augment staff to ensure enhanced security of taxpayer data. This request will provide staff that will not only track access, but assist with granting and terminating access, access reconciliations, reporting, and ensuring proper protocol has been followed when utilizing/consuming taxpayer data.		
Procurement Planned Start Date		Procurement Planned Completion Date	7/2/2018
		Appropriation Act Status	
<b>Service Area</b>			<b>Weight</b>
There are no service areas for this project.			
<b>Procurement Name:</b>	<b>VITA Transition Support-FY17/18</b>		

Procurement Description:

The Department of Taxation requests approval to enter into a Staff Augmentation contract for consultants to provide support to perform required systems and infrastructure activities to facilitate TAX's participation in the Commonwealth's enterprise infrastructure transition. These resources will perform maintenance and enhancement to support TAX's systems as well as provide the required expertise to ensure TAX can be an early adopter in support of the Commonwealth's transition efforts. These resources will also assist with implementing legislative changes, routine maintenance, and systems enhancements aimed at operational efficiency, cost savings, cost avoidance, and improved customer service.

System maintenance requirements:

1. Ensure TAX applications are performing to the functional detail requirements in support of daily business operation
2. Ensure TAX application are available per the business needs
3. Ensure TAX applications are patched and upgraded to ensure continued vendor support and adequate security

System enhancements requirements:

1. Ensure improved worker productivity and make TAX employment attractive to future workforce
2. Ensure TAX applications are performing to the requirement of TAX and the Commonwealth's strategic direction
3. Improve information sharing to optimize current business functions
4. Expand the support of TAX applications and productivity tools that support the recommendations on streamlining government operations
5. Ensure programs and tools which enable all citizens to interact with TAX 24x7 – Safely and Securely

Mandated System enhancement requirements:

1. Ensure TAX applications are performing to state and federal mandated requirements
2. Ensure TAX applications are in compliance with security standards

Furthermore, this request is to provide administrative, security, application analysis, design and development support for IRMS via the following work areas: Advantage Revenue, VTOL (Virginia TAX Online), Report and interfaces, Unix and Database Administration, Siebel, and Return Reconstruction and Compliance Repository (CR), Processing (TACS/KFI and Filenet), Budgeting, Administration and ALM, Microsoft Architecture, Voice and Engineering, TAX Support Center (TSC) and Security planning and administration/ISO.

TAX request staff augmentation support for Taxation's Enterprise Applications and Systems:

AR Environment:

Powerbuilder developer's requirements: developers with 10 + years of experience in the following: SQL, Object oriented software design and development, Powerbuilder version 10.5 or higher and Oracle Database version 10G. Functional and technical knowledge in designing, developing and maintaining TAX processing and revenue management system is highly preferred.

eFile Developer:

Developer with 5+ years of development experience in the following: Oracle, XML, SOA, Visual Basic .net, Internet design and development, and knowledge of electronic tax return applications

Windows Engineer:

· Min 10 year work experience setting up, configuring, and troubleshooting Microsoft Windows Server 2008, and 2012

- Min 7 years experience with IIS configuration and administration
- Min 5 year work experience with SMS

Security Administration requirements:

- Active Directory Administration Experience (prefer 3-4 years of experience)
- Candidate should have experience administering NTFS files system access privileges (prefer 3-4 years of experience)
- Working knowledge of Windows 7 Operating System
- Candidate will need to have the ability to help create documentation and, thus, experience utilizing Microsoft Office.
- Since this person will be communicating directly with the user population, communicating user account credentials and possibly troubleshooting issues with those credentials, this person would need to have outstanding customer service skills.
- Candidate should possess strong problems solving and analytical skills.
- Other skills that will be necessary, we can train in-house.

VTOL:

- Developers with 4 + years of project management experience
- In-depth knowledge of web site design concepts
- Possesses strong analytical skills for assessing cause and effect relationships
- Demonstrates resourcefulness in compiling presentations and reports
- Adapts easily in interpersonal situations
- 5+ years web development experience in Java J2EE version 1.4 or higher
- 5+ years development experience using JBoss Enterprise Application server version 4.1 or Weblogic version 9 or higher or Websphere version 6 or higher
- 3+ years development experience using Seam and/or Hibernate - 3 or more years of web development experience
- 5+ years development experience with Oracle version 12c
- 5+ years development experience using SQL and PL/SQL Functional and technical knowledge in designing, developing and maintaining TAX processing and revenue management system is highly preferred
- TACS/KFI
- Min 1 year work experience setting up and configuring MS Windows Server 2008 and 2012
- Min 1 year work experience with Oracle 12c
- Min 1 year work experience with Sql Server 2012
- Min 1 year work experience with Visual Basic scripting
- Min 1 year work experience with Service Oriented Architecture
- Min 1 year work experience within .Net framework (minimum 3.5 version and higher)
- Min 1 year work experience with Visual Studio 2013
- Min 1 year work experience with PL/SQL or Oracle SQL Developer
- Min 1 year work experience with XML
- Work experience and knowledge of COM architecture (registering and un-registering DLLs)

FileNet:

- FileNet Certified Professional:
- Candidate must be a FileNet Certified Professional – Image Manager (Image Services) as Administrator and Product Technical Support, with a minimum of 10 years of work experience as a FileNet System Administrator who has been responsible for maintaining, upgrading and providing support of large, mission critical FileNet Image Services Systems.
- Candidate must be employed by a current IBM FileNet Software ValueNet Support Provider 2

· Candidate must have demonstrated experience upgrading Filenet Image Services V4.2 or higher to P8 on a Windows/UNIX / Oracle based platform. This includes interfacing with Oracle DBAs who are responsible for upgrading and migrating the databases and interfacing with UNIX administrators who were responsible for upgrading the Operating System of server hardware hosting Image Services in both instances; an upgrade on existing server hardware and an upgrade on new server hardware. At this given time, it is uncertain of the migration path VATAx will undertake.

· Candidate must have performed (independently or functioned as essential personnel) on a minimum of two Image Services System upgrades for one Filenet Image Services upgrade instance. This should include a development or test environment and a production environment. The production environment must have been for a large Image Services MSAR Repository of over 8 Terabytes.

· Candidate must have demonstrated experience installing, configuring and testing Filenet Capture Fax Entry V 5.X or higher integrated with Image Services 4.2.0 and Right Fax software. VATAx supports Filenet's inbound faxing capability via a FAX Server which will be upgraded to include new versions of Filenet Capture Fax Entry and RightFax which will integrate with Image Services 4.2.0. A RightFax vendor will also be assisting VATAx with this upgrade.

· Candidate must have 3+ years experience training and/or mentoring staff for Filenet System Administration of Image Services 4.2 (Basic to Advanced), Filenet Capture Fax Entry 5.X. Experience relevant to these topics should be evidenced:

- o Identify and discuss Image Services and Capture architecture, services, processes and hardware component integration.
1. Configuration of Image Services and Capture and its impact on product's Performance
  2. Application Management
  3. Troubleshooting/Resolution Management – Network vs. Image Services configuration
  4. Systems Performance Monitoring
  5. Disaster Planning and Recovery and Backups
  6. Storage Management
  7. Generating "health check" reports and interpretation of these reports for additional tuning of Image Services

TFS/ALM:

Agile Coach with 5 years work experience implementing Agile development methodology, practices and standards to include but not limited to enterprise reporting and work prioritization.

Automated Testing- Solutions Architect:

Architect with 3-5 years (or more) of solid experience with application testing tools/techniques

must be able to assist in architecting an overall application testing solution. Multiple years experience with application testing, in general, and at least some direct experience with the use of automated testing tools.

Familiarity with standard application life-cycle management practices is required. Assisting in defining the testing strategy and mentoring/training others on industry-standard-best-practice testing techniques is required. The candidate must have excellent analytical, communication, and documentation skills and must be comfortable working with people of all experience levels, from end-users

TSC:

Considerable knowledge of Microsoft Operating systems; Windows 7 and Windows 10; Working knowledge of MS Office, Outlook .

Considerable knowledge of pc hardware, peripherals & networks

Ability to use software tools (dameware etc) to remotely connect to

	workstations. Excellent troubleshooting skills Ability to perform software installations, configurations and troubleshooting hardware and software. Customer service oriented.. Excellent organizational skills Excellent communication skills Excellent troubleshooting and analytical skills. Ability to multi-task.		
Procurement Planned Start Date		Procurement Planned Completion Date	9/1/2016
		Appropriation Act Status	
<b>Service Area</b>			<b>Weight</b>
There are no service areas for this project.			

## Stand Alone Non-Major Procurements

<b>Procurement Name:</b>	<b>eForms Development &amp; Implementation Support FY15-18</b>		
Procurement Description:	TAX requires approval to procure the services of NGNious Solutions to provide support to perform enhancement activities to expand the electronic submissions capability of the proprietary eForms system.		
Procurement Planned Start Date	11/28/2014	Procurement Planned Completion Date	6/29/2018
		Appropriation Act Status	
<b>Service Area</b>			<b>Weight</b>
There are no service areas for this project.			
<b>Procurement Name:</b>	<b>FileNet Upgrade P8</b>		
Procurement Description:	This procurement will utilize professional services to support and provide technical assistance to TAX with the FileNet Image Services Upgrade to the P8 version along with upgrading various additional tools related to TAX's mission critical imaging application, FileNet.		
Procurement Planned Start Date	10/15/2014	Procurement Planned Completion Date	5/2/2016
		Appropriation Act Status	
<b>Service Area</b>			<b>Weight</b>
BReT FileNet Upgrade P8			Primary
<b>Procurement Name:</b>	<b>Improved Security of Taxpayer Data and Agency Applications</b>		
Procurement Description:	TAX requires approval to procure the following software products to ensure additional security of Taxpayer Data (TAX assumes the vendor will provide and install the software):  · Risk Assessment – A risk management platform to properly assess and report on agency security risks		

	<ul style="list-style-type: none"> <li>User Provision Software – While the Agency has a tool for tracking access to various systems – it is a tracking tool, not an enforcement tool. The Commonwealth’s new Security Standards require reporting on access levels, immediate revocation of access as needed, etc. This request will provide software that not only tracks access, but assist with granting and terminating access, access reconciliations, reporting, and ensuring proper protocol has been followed.</li> </ul>		
Procurement Planned Start Date	7/1/2014	Procurement Planned Completion Date	12/31/2018
		Appropriation Act Status	
<b>Service Area</b>			<b>Weight</b>
161 TAX 73217 Customer Services			Primary
161 TAX 79902 Information Technology Services			Secondary
<b>Procurement Name:</b>	<b>Verint Upgrade</b>		
Procurement Description:	Purchase newest release for Verint Upgrade to maintain Vendor Support and bring in Verint to install the upgrade.		
Procurement Planned Start Date		Procurement Planned Completion Date	7/30/2018
		Appropriation Act Status	
<b>Service Area</b>			<b>Weight</b>
There are no service areas for this project.			