

Meeting Summary

Functional Area: Tax Processing

Meeting: BPR Work session

Date: 09/26/2007

Location: HQ CRM618

Meeting called by: Betty Jessie

Attendees:

Tammy West (SME)	Margaret Robinson (SME)
Ronnie Jones (SME)	Minni Powell (BAS)
Sherry Johnson (SME)	Judy Vesely (CSI)
Ritta Carroll (SME)	Stefan Yssel (CSI)



Preparation for meeting:

Work through Tax Processing EA report to confirm accuracy and bring changes to the next meeting (standard).

Session Goals and Objectives:

Discuss Scenarios and Requirements for: Reporting for IFTA, Rentals Tax and Fuels Tax

Summary:

1. Identified the following reporting requirements for IFTA, Rentals Tax and Fuels Tax:
 - The system enable the users to query data as needed based on time periods
 - The system shall be able to determine the total fuel gallons reported and total fuels tax revenue collected by fuel type by period
 - The system shall distribute all reports to the IFTA clearinghouse electronically
 - The system shall distribute statistical reports electronically
 - The system shall generate reports for audit
 - The system shall produce Fuels Tax reports
 - The system shall produce IFTA custom reports
 - The system shall produce Rental Tax reports
 - The system shall provide interface capability for FHWA Fuels Consumption System
2. Identified the reports for each of the requirements in 1.

Plans for Next Workshop:

1. (Judy/Betty – please complete.....)

Homework for Next Workshop:

1. Minni asks the SME's to start making copies of reports (and notes of required changes) and send them to her to get ready for the BI Workshops.
2. Minni asks the SME's to start thinking about the future statistical reports that is going to be needed for discussion in BI Workshops. (refer: requirement for the system to produce statistical reports)

