SEATA 2018
Shifting from Field-Based to On-Site Collections

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Scott Purvis, Georgia
Tennessee DOR
May 2015 Model

- Field visits required 1 day per week
  - Field visits required for all tax types
  - Field visits required if residential address
- Officer metrics based on age of collection
  - Difficult to track
  - Could reset the clock with internal maneuvering
- Call Center
- Officer metrics based on closed cases
-Continued

- No merchant card processor levies attempted
- Payments routed to collection officers
  - Manual duplicate tracking
- Cash register levies produced little cash
- All 80 collection officers made filed visits and conducted seizures
- Case assignment by territory
Tennessee DOR
New Approach

- Primary collection activity from office
- Call center eliminated all officers same responsibilities
- No mandatory quota for field visits
- Officer metrics based on collection calls and closing collections
- Payments taken to cashier
- 12 collection officers available for field visits and seizures
- Implemented alternative workspace solutions
- Case assignment by collection risk score
Tennessee DOR

Results

- Collections remain steady
- Clearing more cases
- Reduced travel costs/fewer field visits
- Fewer seizures
Georgia DOR

Collections Split By Income & Trust Tax

- Eleven Regional Offices
- Throughout the State
- 159 Freaking Counties

- Headquarters
  - located in Atlanta
Regional Offices – Trust Taxes

Collections by both Phone & Field Contact

- Geographical Territory
- Task Manager for Assignment
- Risk Scoring for Task Manager
- Liens must be requested for issuance

- Collection case created after Due Process
- Task Manager for Assignment
- Risk Scoring for Task Manager
- Liens must be requested for issuance
Territories for Reg Offices
Income Tax Collections

One Group in Headquarters & Private Collection Agencies

- Incoming Calls handled by Temps
- Work Items related to Collection Accounts worked by FTE
- Liens issued automatically after due process
- Two Private Collection Agencies
- Function as “Outbound” call Center
- No enforcement action taken by Agencies
Collection Scorecards

Two Different Scorecards – based on Productive Hours

- Collection Scorecard – Completions
  - What constitutes a completion?

- Collection Scorecard – Aging
  - 180 days to do something!
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