JOB AID

Understanding ECO Team Leads
ZICM_WORKLIST

Business Process:	**Business Technology Office - SUNTAX**
Tax Type:	**All**
Activity:	**Understanding ECO Team Leads**
Sub-Activity:	**ZICM_WORKLIST**

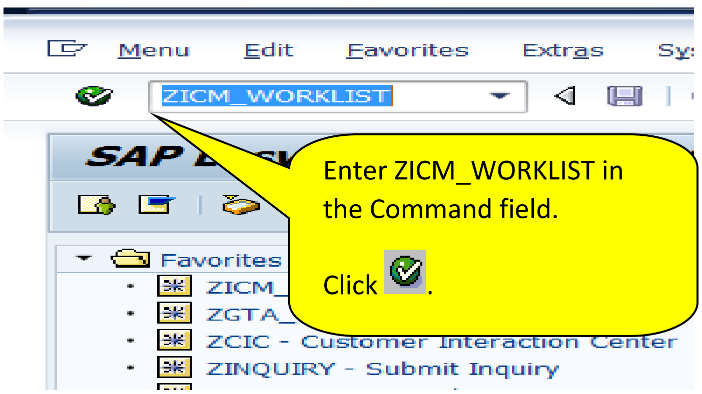
Purpose/Objective

GTA's new Education and Compliance Outreach (ECO) program will be managed and reported from Integrated Compliance Management (ICM). ECO leads will be created and managed using ZICM_WORKLIST. This job aid provides the steps to access an ECO lead and explains the ECO lead screen.

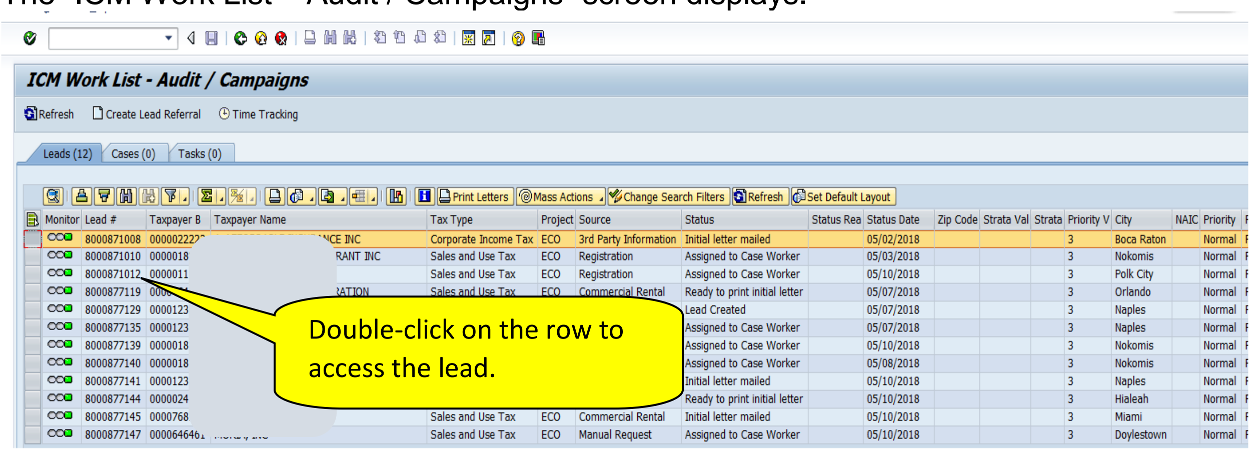
Steps

Accessing the Lead

ECO Caseworkers will access the lead information using transaction ZICM_WORKLIST.



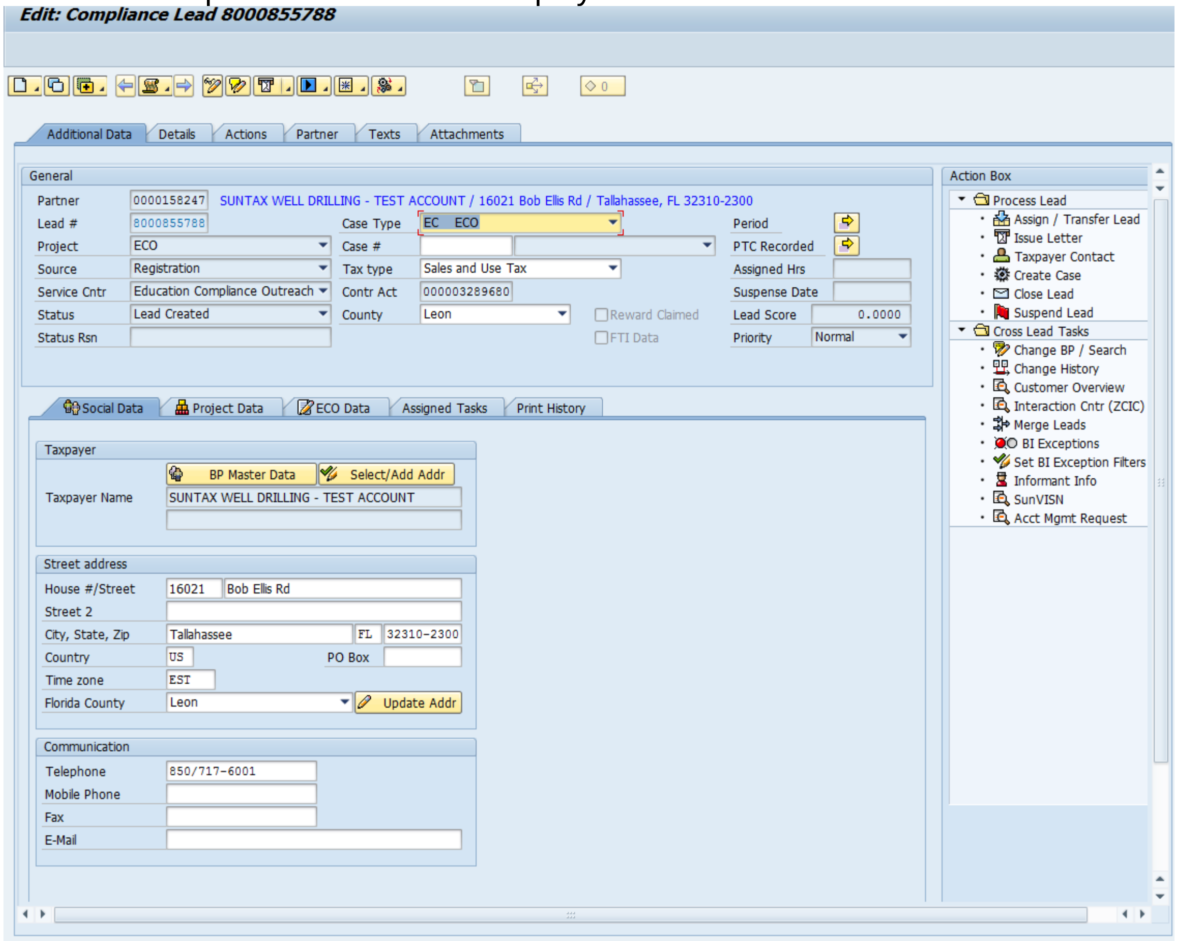
The "ICM Work List – Audit / Campaigns" screen displays.



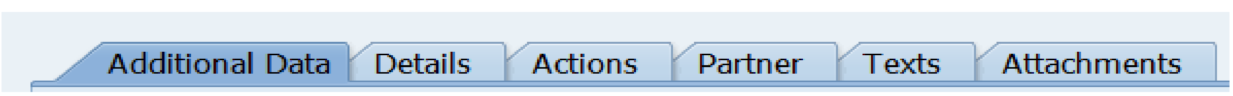
Note: You can also use the Change Search Filters button to display the Selection Criteria screen and enter specific search criteria to display and access leads.

ECO Lead Screen

The Edit: Compliance Lead screen displays.



There are several tabs on this screen which the ECO Caseworker will use to view and update information. The following provides an overview of the key tabs you will use.



Note: These tabs are located at the top of the lead screen.

The information you will find on these tabs include:

Additional Data – General information such as Project, Source, Case Type
Details – Update Status and enter Notes regarding the ECO Lead
Actions - Not in use for ECO
Partner - Lists the partners on this lead
Texts - Notes summary, Lead notes, and Taxpayer Contact notes
Attachments - Allows the user to attach files relating to the lead

Note: These tabs are located on the lower section of the lead screen.

Social Data - Name, Address, and Contact numbers
Project Data - Registration Created on Date, NAICS, SIC, Kind Code
ECO Data – Update ECO Details and Case Data

- Letter Mailed
- Not Mailed
- No Response
- Outgoing Calls
- Incoming Calls
- SCORE Referral
- Correction Made
- Speaking Engagement
- Assistance Needed
- No Assistance Needed
- Office Visit
- Field Visit
- Collection Amount
- Correction Amount
- Physical SC - User’s physical service center. This section needs to be selected when correspondence is printed.
- Primary NAICS - Drop down will be available if the case has a NAICS code
- Changed By - User ID of the User that last changed the lead
- Changed At - Time the User made the change
- Changed On - Date the change was made

Assigned Tasks – Caseworker can assign a task to themselves or another caseworker for actions needed on the lead
Print History - Shows a history of letters printed for the lead