



Accessing ECO Team Worklist ZICM_WORKLIST

Business Process:	Business Technology Office - SUNTAX
Tax Type:	All
Activity:	Accessing ECO Team Worklist
Sub-Activity:	ZICM_WORKLIST

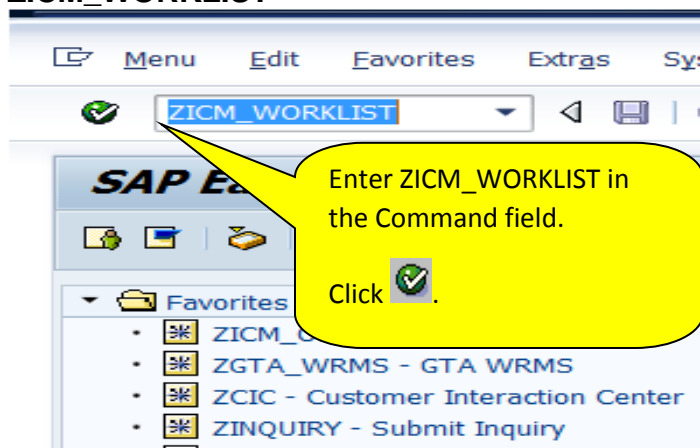
Purpose/Objective

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 explains this worklist.

Steps

After creating a lead, ECO Caseworkers will access the lead information using transaction ZICM_WORKLIST. This transaction bypasses the Selection Criteria (filter) screen, it is applied in the background, and goes directly to your worklist.

ZICM_WORKLIST

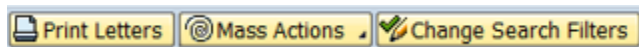


The "ICM Work List – Audit / Campaigns" screen displays.

Monitor	Lead #	Taxpayer B	Taxpayer Name	Tax Type	Project	Source	Status	Status Rea	Status Date	Zip Code	Strata Val	Strata	Priority V	City	NAIC	Priority	F
8000871008	0000222		ANCE INC	Corporate Income Tax	ECO	3rd Party Information	Initial letter mailed		05/02/2018				3	Boca Raton	Normal	F	
8000871010	0000018		RANT INC	Sales and Use Tax	ECO	Registration	Assigned to Case Worker		05/03/2018				3	Nokomis	Normal	F	
8000871012	0000011			Sales and Use Tax	ECO	Registration	Assigned to Case Worker		05/10/2018				3	Polk City	Normal	F	
8000871119	0000464			Sales and Use Tax	ECO	Commercial Rental	Ready to print initial letter		05/07/2018				3	Orlando	Normal	F	
8000871129	0000123		INC	Sales and Use Tax	ECO	Registration	Lead Created		05/07/2018				3	Naples	Normal	F	
8000871135	0000123		INC	Sales and Use Tax	ECO	3rd Party Information	Assigned to Case Worker		05/07/2018				3	Naples	Normal	F	
8000871139	0000018		RANT INC	Corporate Income Tax	ECO	Registration	Assigned to Case Worker		05/10/2018				3	Nokomis	Normal	F	
8000871140	0000018		RANT INC	Corporate Income Tax	ECO	Registration	Assigned to Case Worker		05/08/2018				3	Nokomis	Normal	F	
8000871141	0000123		INC	Pollutants Tax	ECO	Subjectivity	Initial letter mailed		05/10/2018				3	Naples	Normal	F	
8000871144	0000024		NUM ASSOCIATION	Sales and Use Tax	ECO	Frequency Change	Ready to print initial letter		05/10/2018				3	Hialeah	Normal	F	
8000871145	0000768			Sales and Use Tax	ECO	Commercial Rental	Initial letter mailed		05/10/2018				3	Miami	Normal	F	
8000871147	00006464			Sales and Use Tax	ECO	Manual Request	Assigned to Case Worker		05/10/2018				3	Doylestown	Normal	F	

Worklist Key Buttons

In addition to the list of leads assigned to the ECO Caseworker, key buttons on the worklist screen assists the caseworker in managing their assigned leads.



- **Print Letters** – This button allows you to print lead letters that are in queue. When a letter has been issued from an ECO lead, you will Save the lead and go back to the worklist to print the letter. After issuing letters on multiple leads, this feature allows you to print all letters that are in queue at one time.
Note: Currently ECO has one letter – New Registration Letter.
- **Mass Actions** – Use this button to process a change for multiple leads at one time. For example, Assign/Transfer Leads, Issue Letters, or Close Leads.
- **Change Search Filters** – This button is used to change your filter selections.. When you click this button, the filter screen displays. There are numerous options for searching as shown below.

The screenshot shows the 'Selection Criteria' window. It has a title bar with a close button and a search icon. Below the title bar is a toolbar with various icons. The main area is divided into several sections: 'Selection Criteria' with a 'Clear Filters' button and a list of filters (Lead #, Created / Referred By, Creation Date, Taxpayer BP #, Tax Type, Status Filter, Status, Status Reason, Status Date, Service Center); 'Miscellaneous' with filters for Case Type, Estimated Liability, Address Zip Code, Assignment Score, County, Kind Code(s), Anonymous Lead, FTI Data, and SunVISN BP; 'Project / Source Filter' with filters for Project Code(s) and Source Code(s); 'Partner Function Filter' with filters for User Name and Partner Function; and 'Layout' with a filter for Layout. Each filter has a text input field, a 'to' field, and a search icon.

Note: You can use these filter selections to display a subset of all leads assigned to the caseworker. For example, by filtering on the Status field, you can display only those leads at the selected status.