



## Understanding ECO Team Leads ZICM\_WORKLIST

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

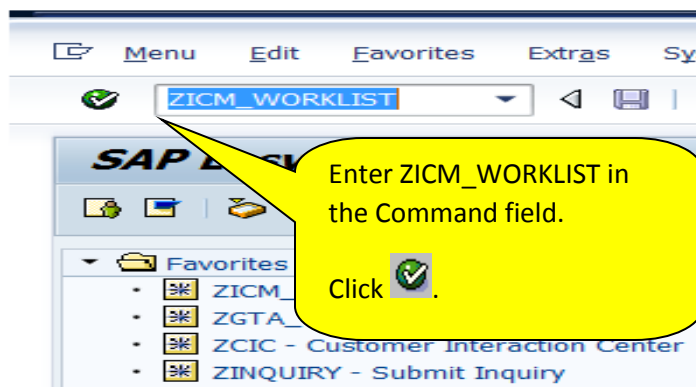
### Purpose/Objective

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.

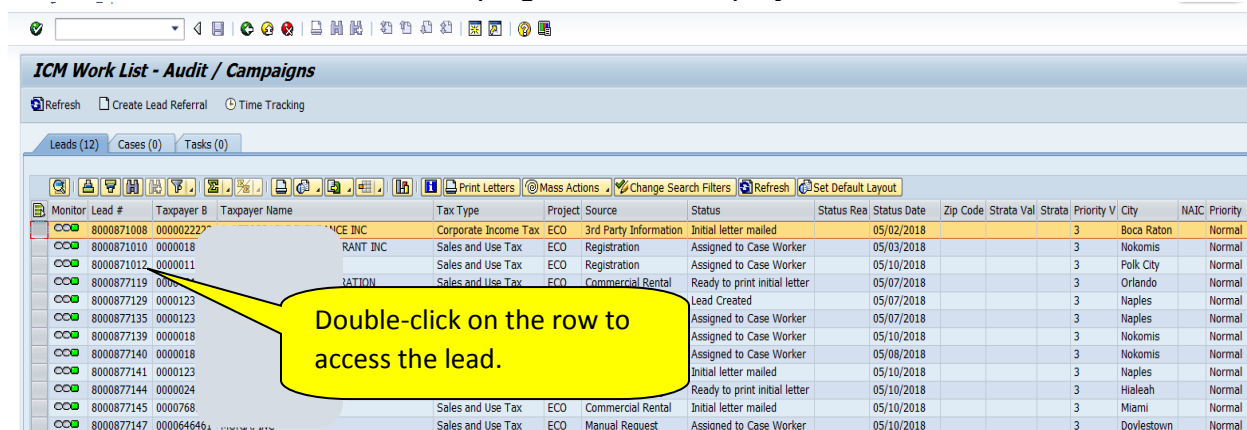
### Steps

#### 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.

*Edit: Compliance Lead 8000855788*

Additional Data Details Actions Partner Texts Attachments

General

Partner 0000158247 SUNTAX WELL DRILLING - TEST ACCOUNT / 16021 Bob Ellis Rd / Tallahassee, FL 32310-2300

Lead # 8000855788

Project ECO

Source Registration

Service Cntr Education Compliance Outreach

Status Lead Created

Status Rsn

Case Type EC ECO

Case #

Tax type Sales and Use Tax

Contr Act 000003289680

County Leon

Period

PTC Recorded

Assigned Hrs

Suspense Date

Lead Score 0.0000

Priority Normal

Reward Claimed

FTI Data

Action Box

- Process Lead
  - Assign / Transfer Lead
  - Issue Letter
  - Taxpayer Contact
  - Create Case
  - Close Lead
  - Suspend Lead
- Cross Lead Tasks
  - Change BP / Search
  - Change History
  - Customer Overview
  - Interaction Cntr (ZCIC)
  - Merge Leads
  - BI Exceptions
  - Set BI Exception Filters
  - Informant Info
  - SunVISN
  - Acct Mgmt Request

Social Data Project Data ECO Data Assigned Tasks Print History

Taxpayer

BP Master Data Select/Add Addr

Taxpayer Name SUNTAX WELL DRILLING - TEST ACCOUNT

Street address

House #/Street 16021 Bob Ellis Rd

Street 2

City, State, Zip Tallahassee FL 32310-2300

Country US PO Box

Time zone EST

Florida County Leon Update Addr

Communication

Telephone 850/717-6001

Mobile Phone

Fax

E-Mail

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.

Additional Data Details Actions Partner Texts Attachments

**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

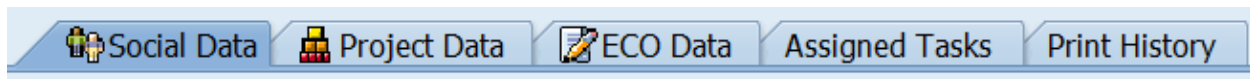
**Details** – Update Status and enter Notes regarding the ECO Lead

**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