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| **Business Process:** | **Business Technology Office - SUNTAX** |
| **Tax Type:** | **All** |
| **Activity:** | **Creating Leads for ECO Team using ZICM\_WORKLIST** |
| **Sub-Activity:** | **New Registration** |

**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.

**Steps**

Before creating a lead referral, use transaction ZCIC to verify each business partner number is a new registration. Do not create a lead if the account shows collection or audit activities, has a START letter previously mailed, or has a Voluntary Disclosure case.

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| **Name of  Screen/Tab/Pop-up Window** | **STEPS** |
| *SAP Easy Access* | 1. Enter ZICM\_WORKLIST in the command field. 2. Click . |
| *ICM Work List – Audit / Campaigns* | 1. Click . |
| *Lead Details Section* | 1. Project - select ECO. 2. Source - select Registration. |
| Taxpayer Info Section | 1. Partner Type - select Search For / Create New Taxpayer. 2. Select radio button for Person or Organization 3. Enter BP #. 4. Press Enter |
| Referral Details Section | 1. Tax Type – select tax type. 2. Recommendation – select ECO. 3. Priority – select priority (normal, high, critical). |
| Reason for Referral Section | 1. Enter New Registration. |
| Attachments Section | 1. If needed, click to add an attachment. |
| *ICM Work List – Audit / Campaigns* | 1. Click . |