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Beyond the implementation

Presented by
Peter-Paul Grootens

19 February 2025

Tax Administration Performance Summit '25

Here With You Today

Peter-Paul

Client Success

"

My primary role is helping our clients reach their ultimate goals and objectives once our solutions are implemented. Having worked closely with the Inland Revenue Departments of Anguilla, Grenada, and St. Kitts and Nevis, I can share best practices as well as the challenges faced by similar OECS countries.

Raise Your Hand:

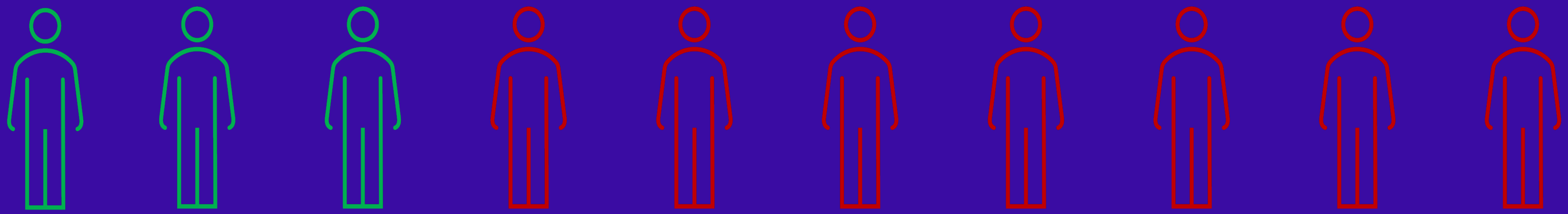
If you have been part of a digital transformation project.

Keep Your Hand Up:

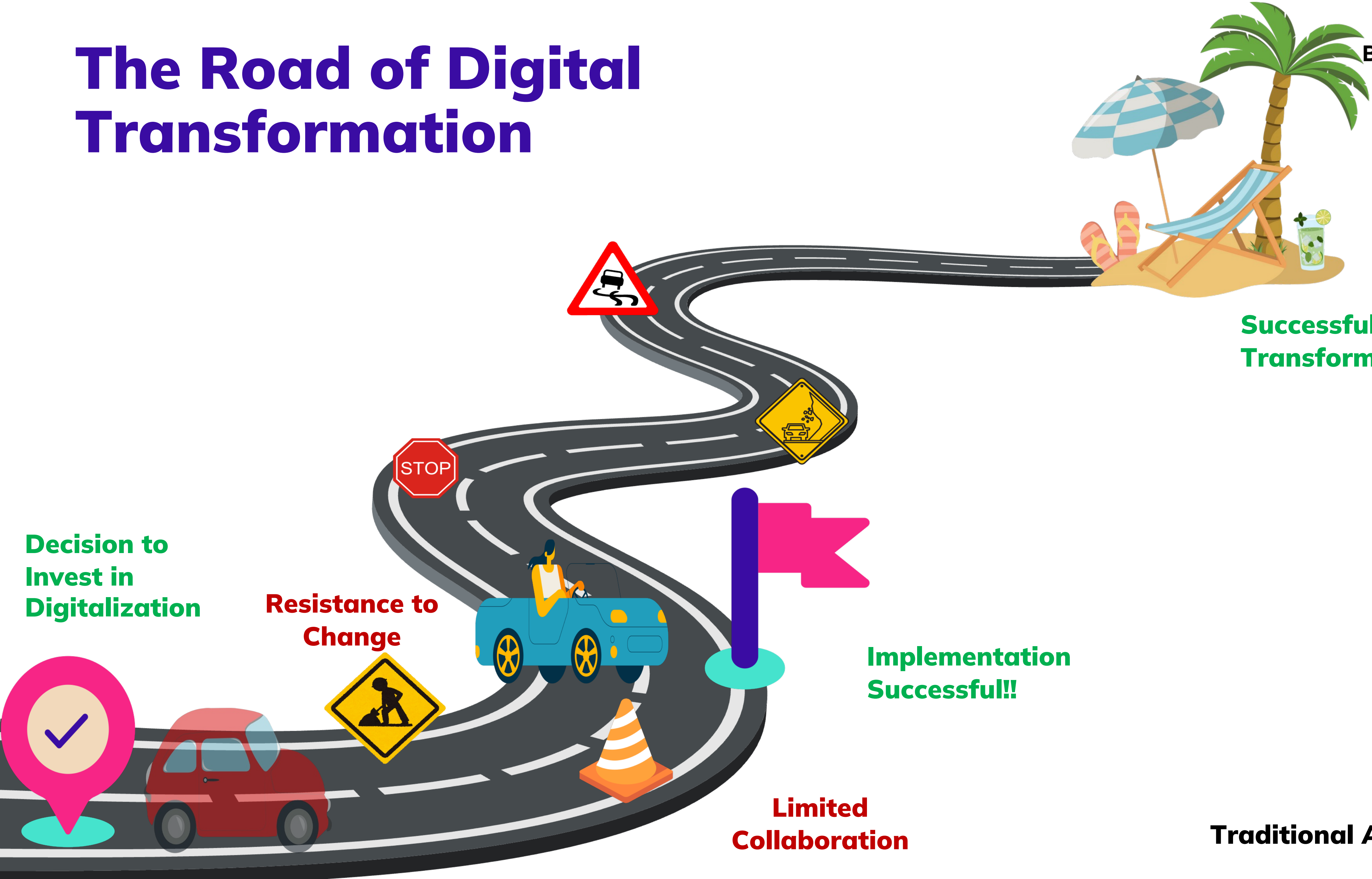
If that digital transformation project went exactly as planned, with no surprises.

A staggering 70% of digital transformations fail.

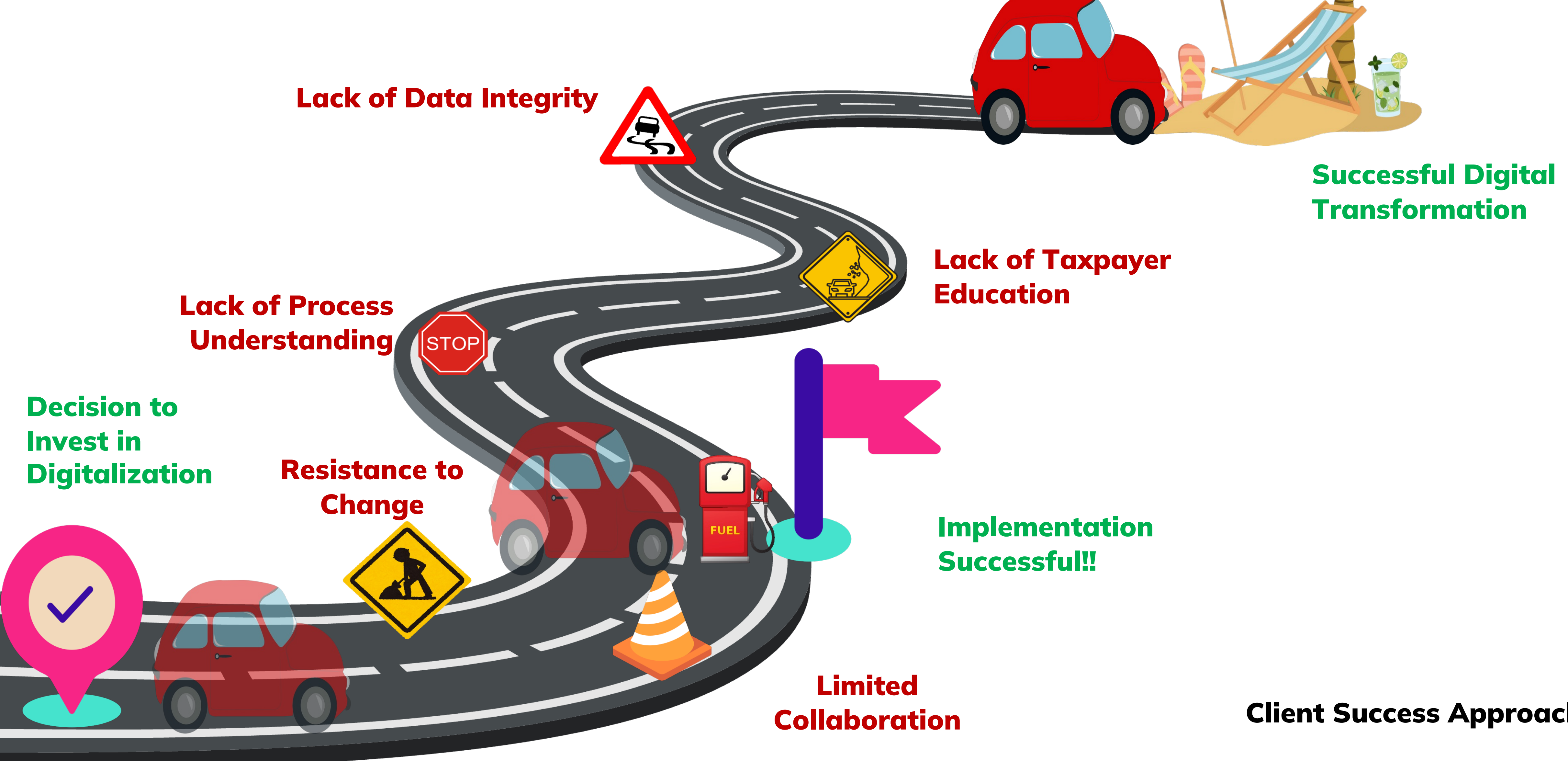
Source: Forbes 2019



The Road of Digital Transformation



The Road of Digital Transformation



Key Pillars of Post-Implementation Success

01
Adoption of the Solution
Ensure internal officers understand how to use the system, as well as processes.

02
Managing Internal Resistance
Addressing resistance across teams and leadership.

03
Taxpayer Education
Ensure taxpayers understand their obligations, and any changes that arose.

04
Ensuring Data Integrity
Maintaining an accurate and reliable taxpayer database.

05
Addressing Challenges
Proactively resolving issues as they arise.

Adoption of the Solution

In-App Support and Learning Management System

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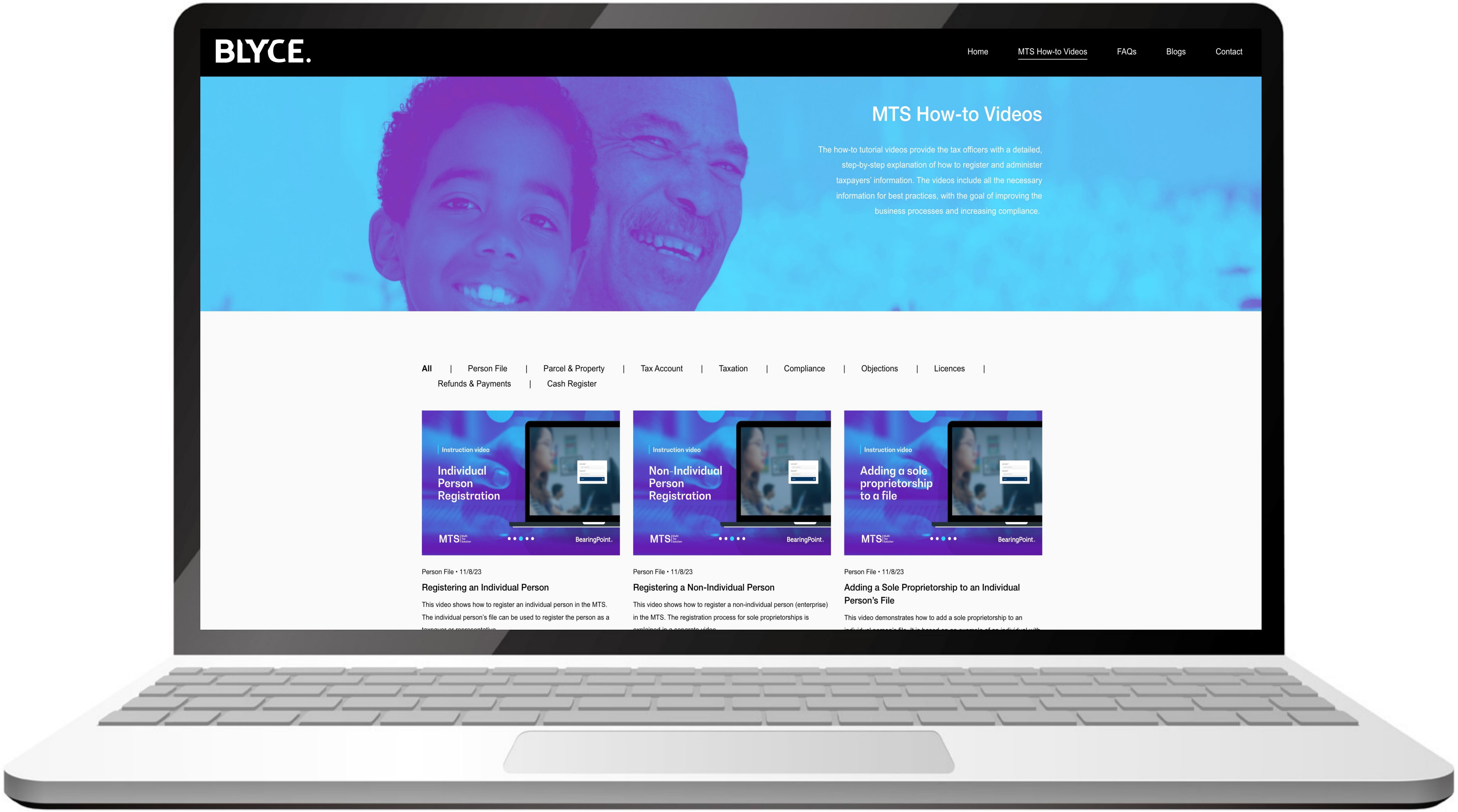
Learning Library 1.0



In-App Support

Env: Test – 2025-02-11 05:44 GMT-5 – 0 / GL: 22.2.x / SL: 4.23.34

Link

Home | Registrations | Accounts | Taxation | Compliancy | Payments | Licences | Correspondence

Filter

Transaction reference

Payment reference / Description

Source reference

Tax Office

No options available

Account number

Person name

Amount

Effective date

Processed date

Channel

Status

- [ ] Processed (1231)
- [x] On hold (59)
- [ ] Reversed (9)

Apply filter

/ Received payments

Received payments

Transaction reference	Payment reference / Description	Source reference	Account	Amount	Ef
300000002	2000005713	21		750.00	08
300000006	00624130000237	22		100.00	19
300000008	00623130000576	22		100.00	20
000000370	45220230000058	123000461		500.00	27
000000371	45220230000059	123000463		500.00	28
000000372	45220230000060	123000464		500.00	28
000000373	45220230000061	123000467		500.00	28
000000395	45220230000063	123000494		500.00	29
000000407	45220240000001	124000006		500.00	02
000000411	45220240000002	124000013		500.00	04
000000414	20120230000008	124000016		500.00	04
000000415	20120230000009	124000017		75.00	04
000000416	20120230000009	124000018		75.00	04/01/2024

channel

Cash register channel | On hold

Manual Allocation of a Payment

This article walks you through how you can do so in the system.

Written by Peter-Paul
Updated over 11 months ago

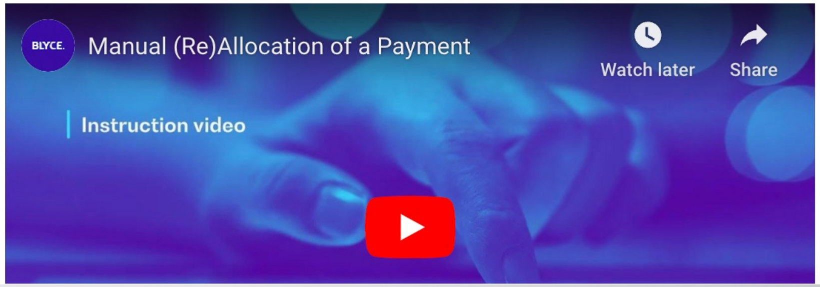
Those with appropriate access rights can manually allocate a payment within our payment's module. Manual allocation is needed when the system cannot link a payment to a payment obligation.

To manually allocate a payment, you must navigate to Payments > Received payments.

1. Once there, filter the received payments by the status – on hold. This can be done on the left-side of the screen.
2. Once the list of on-hold payments is filtered, you can manually allocate the payment to the correct payment obligation.
3. Open the payment. When opened, click on allocate payment on the right-side of your screen.
4. Fill in the necessary information, such as allocation type (E.g., Prepayment or Outstanding Payment Obligation).
5. Search for the tax account, by entering the information available.
6. Once found, select the allocation amount.

Please note, if the allocation amount is less than the amount that is available to be allocated, you must allocate the remaining amount from the payment. To do so, follow the steps from *Step 3*.

You can also watch a quick how-to video below:



In-App ChatBot

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Projects / Saint Kitts and Nevi... / SKNCP-19

Business Licence Certificate

+ Add

Client Application BO/CR

Description

If the taxpayer changes the business name or address later on in the year and needs a new business licence printed. Would a new document be generated with the new business name or address once the change of information is registered?

Activity

Show: All Comments History Work log Summarize Newest first

Add a comment...

Pro tip: press M to comment

Juliette Simmonds March 5, 2024 at 1:52 PM

Yes, the information was helpful and we can now reprint business licence certificates using the steps outlined.

Peter-Paul Grootens February 7, 2024 at 11:26 AM

Hello @Juliette Simmonds ,

Yes, you can reprint the business licence which will reflect the most recent information. To do so, you can:

1. Navigate to Licences > Business Licence (or Liquor Licence);
2. Search for the Licencee and open the Licence that you want to reprint;
3. Under Actions, on the right side of the screen, you can click on the dropdown list.
4. Click on Reprint Licence.

Closed Fixed

Actions Improve issue

Details

Assignee: Unassigned

Assign to me

Reporter: Juliette Simmonds

Development: Create branch, Create commit

More fields Story Points, Original estimate, ...

Automation Rule executions

Created February 6, 2024 at 3:21 PM

Updated March 5, 2024 at 1:52 PM

Resolved March 5, 2024 at 1:52 PM

Configure

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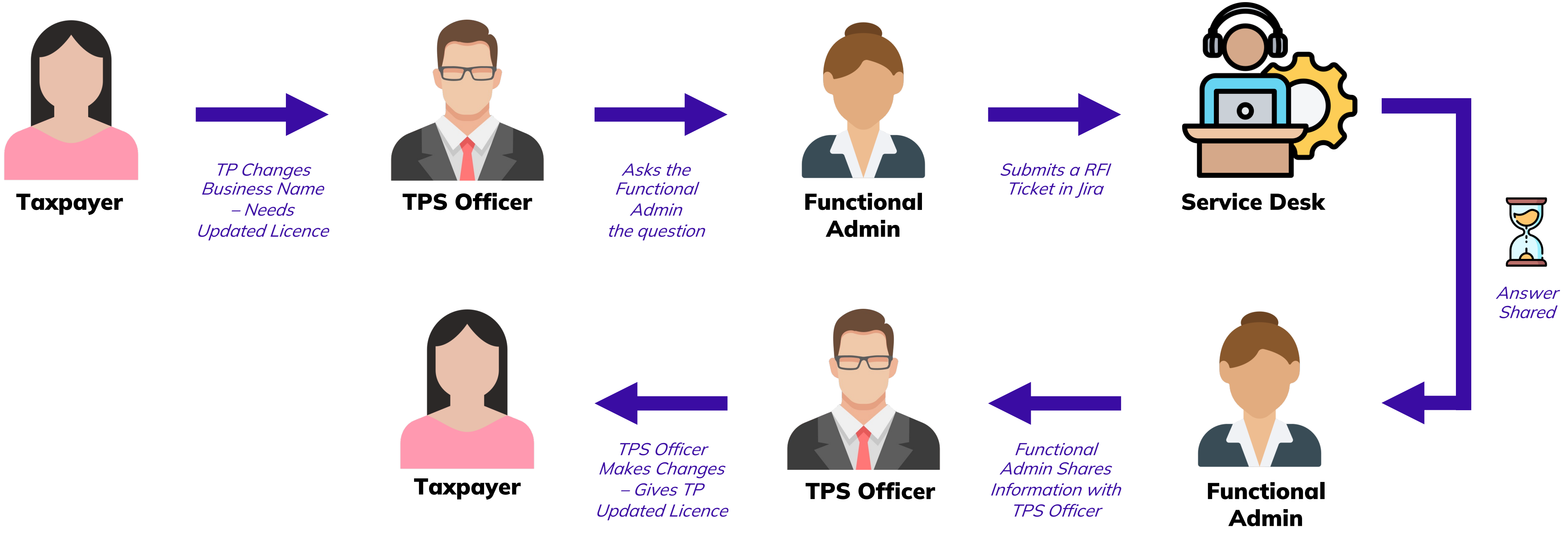
Before The In-App Chatbot – Flow



Env: Test – 2025-02-11 05:44 GMT-5 – 0 / GL: 22.2.x / SL: 4.23.34

Link

Home | Registrations | Accounts | Taxation | Compliancy | Payments | Licences | Correspondence | Batch | Settings | User management | Integration | Data maintenance | Manual, User

Filter

Licencee

TIN

Location name

LicenseType

Choose an option

Tax Office

- St. Kitts
- Nevis
- Test

Status

- Granted
- Issued
- Withdrawn
- Cancelled

Effective date

dd/mm/yyyy

/ Business licences

Business licences

Register business licence +

Use the filter in order to see the results

Fin

The team can also help

Fin

👋 Hi there, what brings you here today?

If the taxpayer changes the business name or address later on in the year and needs a new business licence printed. Would a new document be generated with the new business name or address once the change of information is registered?

Fin

Working on the answer... Please note, I am Fin, your friendly AI support, still learning and growing, so double-check important details to ensure everything's correct!

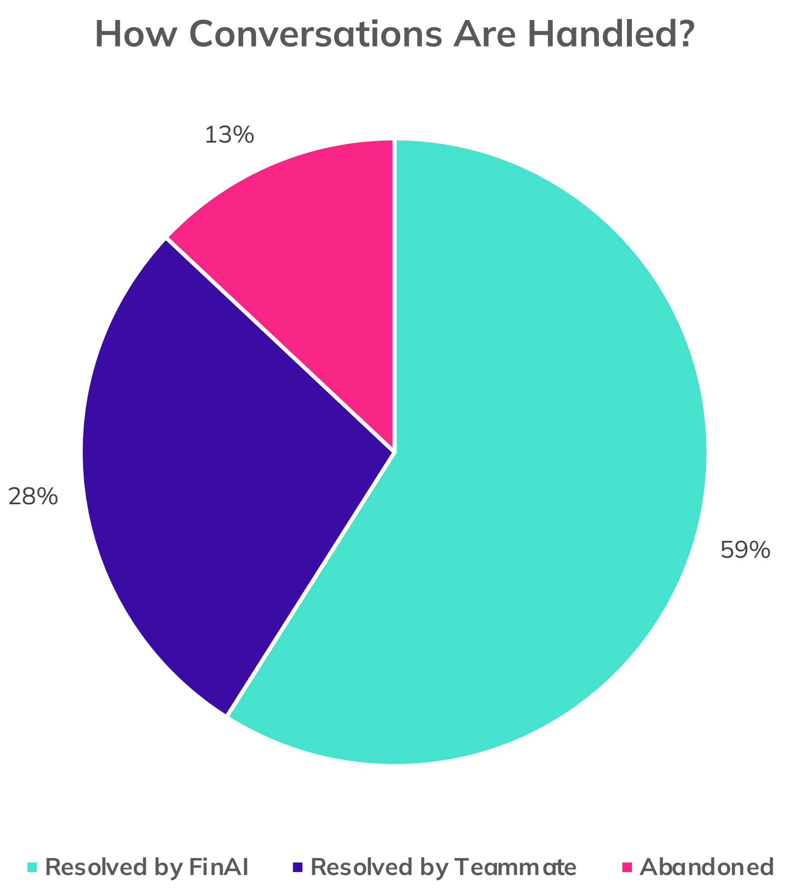
Fin • AI Agent

Yes, a new business license document would be generated with the updated business name or address once the change of information is registered. When a business changes information during the year while th[illegible]ense is still valid, a new license needs to be [illegible]sued to reflect the most

Message...

Powered by Fin AI Agent

In-App ChatBot: In-Action



Learning Management System

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Managing Business Licences

28 mins

Continue Learning →

88% complete

Info

In this track you will learn:

- Registering a Business Licence
- Correcting a Business Licence
- Renewal of a Business Licence

This course provides a comprehensive overview of managing business licences in the MTS, covering key processes such as licence registration, renewal, fee category adjustments, blocking automatic renewals, and correcting errors. Participants will learn how to effectively handle various

→ Read More

Contents:

Business Licence

peterpaul.grootens@blyce.com

Peter-Paul

Link

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CERTIFICATE

- OF ACHIEVEMENT -

THIS DEGREE IS PRESENTED TO

Lonnie Hobson

for successfully completed the Managing Business Licences program, demonstrating proficiency in the MTS Software.

Avinash Grootens
Chairman & CEO - Blyce

BLYCE.

Peter Paul Grootens
Program Manager & Client Success Specialist

Raise Your Hand:

If your organization had access to an LMS, would you enforce its use and certificate completion?

Taxpayer Education

Changes to Filing

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Agenda: Post-Implementation Site Visit

Day 2 – Tuesday, June 18th

Subject	Description	Parties	Start	End	Duration
Cashiers - Payment Processing	Registering Account Payment, On-Demand Revenue, Transfers, Balancing, Correcting Payments / Reversals, and Cashier Session Approval	Cashier Unit	9:00 AM	10:30 AM	1:30
Initiative – Allocation of Prepayments	Discussion and analysis on prepayments that are accumulating.	Revenue Operations Manager, Assessment Manager, Audit Manager, Functional Admins	11:00 AM	12:30 PM	1:30
Lunch Break			12:30 PM	1:30 PM	
Collections Unit	BASE Reports - Non-Filers + Non-Payments + Opening Balances	Collections Unit	1:30 PM	2:30 PM	1:00
Corporate Income Tax	Reviewing Corporate Income Tax Return Process + Installments	DP & Audit Unit	2:30 PM	3:30 PM	1:00
TBD / Ad hoc support	*TBD / Ad hoc support*	*TBD*	*3:30 PM*	*4:00 PM*	*0:30*

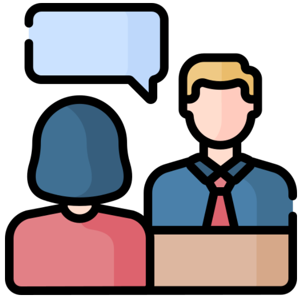
Initiative – Allocation of Prepayments

Payment Credits

Confused

Investigate

VAT Overpayments



Discussions

- Taxpayers Made Payments
- Had Tax Credits Covering Tax Due

Why?

Incorrect Tax Credits

Changes Within VAT Filing

Previously: Taxpayers manually carried forward tax credits.

Currently: Tax credits are automatically carried forward based on tax returns.

Awareness Gap: Taxpayers unaware of the automatic tax credit calculation.

Result: Taxpayers manually carried forward credits, following old practices.

Addressing the Issue

1

Identifying Return Periods

Analysed return periods with input adjustments to pinpoint issues.

2

Assessment Collaboration

Worked with the Assessment Unit to review and validate affected tax periods.

3

Taxpayer Guidance

Communicated instructions for refiling corrected returns and adapting to the new system.

4

Payment Reallocation

Adjusted payment credits to align with outstanding balances.

5

Public Awareness

Issued general communications to educate taxpayers and prevent future errors.

Addressing Challenges

Bank Payment Allocation

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Two Problems

Taxpayers Reached Out.

Stated Payments Not Reflected On Their Account.

Head Cashier Shared Challenge.

It Is Difficult To Know Who Paid and For What.

How We Approached It?

1. Analysis of the problem. What is happening with the bank payment information.

Lack of Information Sharing

What the Taxpayer Entered

Payment Data

User: [redacted] *User: Name of Person Making Payment

Description: PAYE April 24 ref. no.0042424040005452.

Amount: XCD 1,290.00

Date: 06/05/2024 4:02:18 PM

Result

Status: Successful

Reference Number: 16003329

Message: Successful

If you have any questions, please contact us at:

Anguilla 1-264-498-4725
Dominica 1-767-448-4725
Grenada 1-473-440-4725
St. Kitts 1-869-465-2265
St. Lucia 1-758-458-4725
St. Vincent 1-784-453-4725

Note: This e-mail is generated automatically, please do not reply this message.

What the IRD Received

Account Number:

Date	Description	Debit	Credit
05/07/2024	ACH Transfer B/O Waggy-T		1,290.00

Lack of Information Sharing (II)

What the Taxpayer Entered

eAlert Message

Dear

We would like to inform you that your XCD account ending with
has been debited for the amount of 564.00 XCD plus applicable fees.

The payment details are as follows:

Internal Reference number: 2024/07/08:00009

Receiver :

Remittance information : 0042424030005222

Kind regards,

This is an automatically generated message. Please do not reply to this message.

What the IRD Received

Account Number:

Date	Description	Debit	Credit
07/08/2024	CHAMBER OF INDUST		564.00

How We Approached It?

1. Analysis of the problem. What is happening with the bank payment information.

2. Initial discussions with treasury and the IRDs bank.

3. Analysis of first data-sets that were shared from the IRDs bank.

4. Payments within that banking network showed usable information.

5. Payments from other banks need usable information.

6. Discuss long-term solution for smoother bank payment allocation

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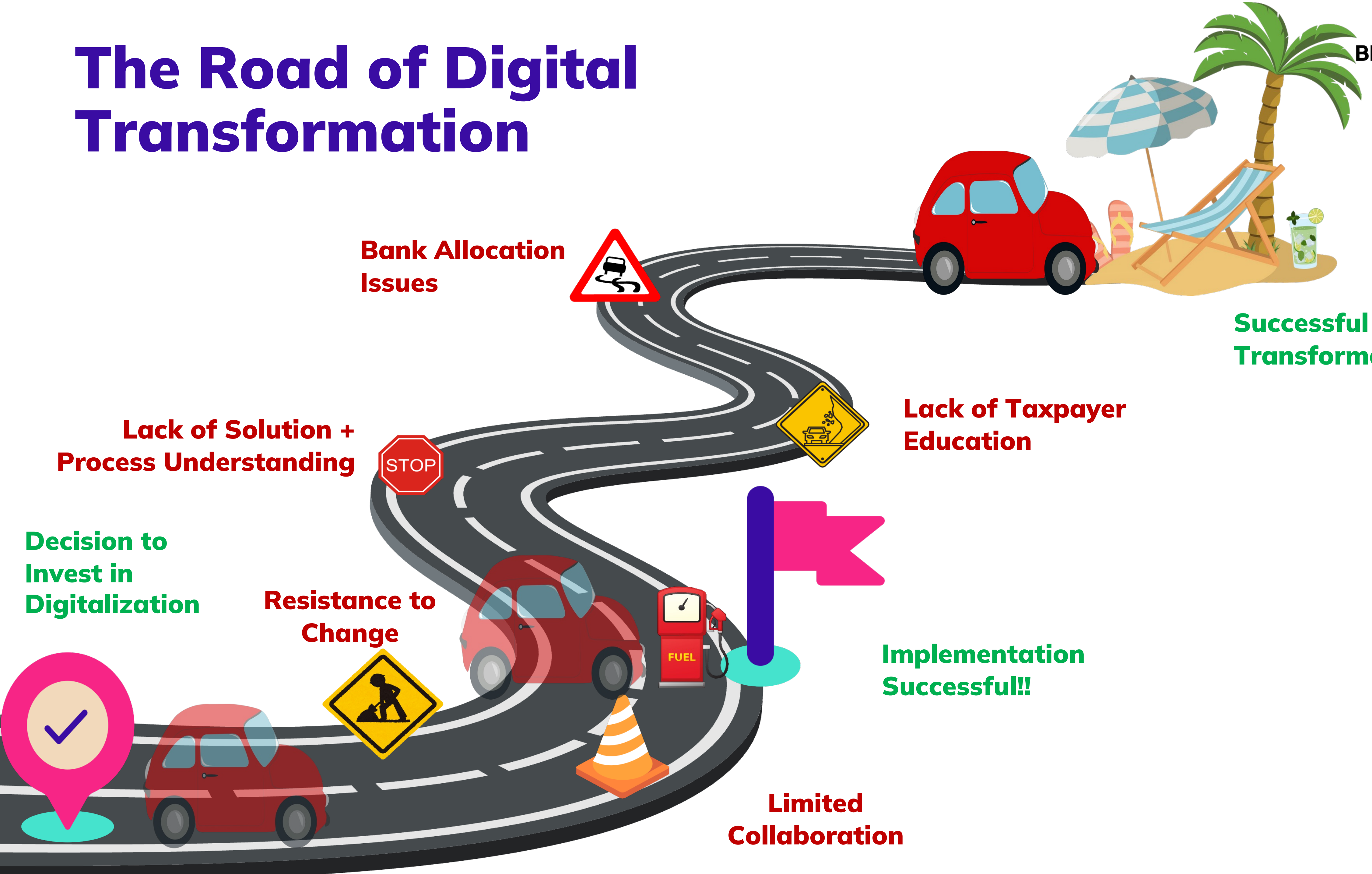
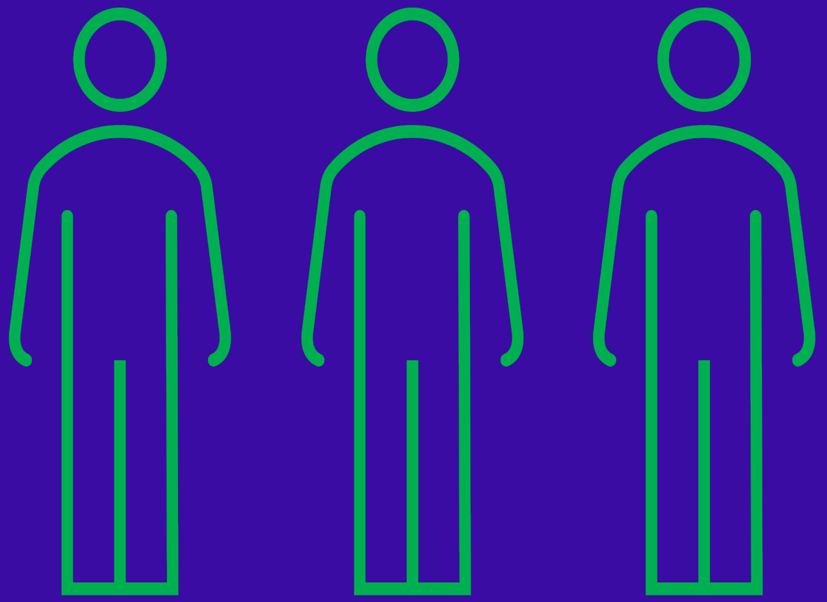


Together, we can be a part of the 30% of successful digital transformations.



Thank You

For Your Attention