

Steering Committee

Ohio Business Gateway

June 28, 2018

The Ohio Business Gateway

Mission Statement

MAKE DOING
BUSINESS IN OHIO
EASY AND EFFICIENT
BY PROVIDING
E-GOVERNMENT
SERVICES THAT ARE
SIMPLE AND SECURE

Guiding Principles

Focus on the **needs of businesses**
as the end user

Clear customer journey for starting,
managing, and growing a business

User experience that maximizes
value and efficiency

Provide a system of **tools and
information** to businesses

To create an **adaptable, integrated,
and secure** digital platform

Agenda

Ohio Business Gateway Steering Committee Meeting

Topic	Description	Presenter	Time
Welcome	Welcome and procedural updates	Lt. Governor Mary Taylor	5 minutes
Operations Update	Update on Ohio Business Gateway operations	Angelo Serra	10 minutes
Modernization Project Update	<p>Project Update</p> <ul style="list-style-type: none">• Modernization Project overview & benefits• Progress since our last meeting• What to expect at go-live• Business user engagement & communications	System Integrator (SI) & Organizational Change Management (OCM) Teams	30 minutes
Open Discussion and Suggestion Box	<p>Open forum to discuss any additional items</p> <ul style="list-style-type: none">• Foster responses for the Suggestion Box• Provide attendees the opportunity to share thoughts and bring new ideas to the table for improving the Gateway	SI & OCM Teams	15 minutes

Gateway Operations Update

Ohio Business Gateway Modernization Project

Gateway Operations Update

Current Gateway Usage

Gateway Usage (2018 to date)

- \$7.838B in electronic payments (\$7.860B same time last year)
- \$2.256B in offline payments (\$2.543B same time last year)
- 2,660,683 transactions (2,547,863 same time last year)

Daily Balancing Completion Times (2018 to date)

- On average, 1 hour earlier than same time last year (9:35 a.m.)
- Latest - 1:18 p.m. on 1/3/2018
- Earliest - 8:47 a.m. on 6/1/2018

Project Update

Ohio Business Gateway Modernization Project

Modernization Project Phases

Key Project Milestones and Activities

STRATEGY

MARCH 2015-
JUNE 2015

Designed a **strategy** and **implementation plan** for the Gateway Modernization project

REQUIREMENTS

JULY 2015-
OCTOBER 2015

Defined **system requirements**, established **project governance** and **communications plans** and drafted the Request for Proposal (RFP)

PREPARATION

NOVEMBER 2015-
FEBRUARY 2016

Released **user-facing enhancements** and prepared for implementation by releasing the RFP and **delivering communications** to internal and external stakeholders

MODERNIZATION

SEPTEMBER 2016-
SUMMER 2018

Implementing a **modernized platform** which will transform the current Gateway into a **more user-friendly, reliable and secure portal**

Modernization Benefits

Providing Value to the Business Community

The Gateway Modernization Project will transform the current Gateway into a more user-friendly, reliable and secure portal.

PHASE I:

Improved business user experience

TARGET GO-LIVE: July 2, 2018

Phase I provides a more efficient and user-friendly experience for Gateway users.

BENEFITS

- **Streamlined Onboarding**
 - Creating an account and identifying which filings to complete is easier than ever
- **Secure Service Provider Processes**
 - Switching between business accounts and requesting and granting access to other businesses is easier than ever
- **Simplified Filing Processes**
 - Pre-populated information and fewer required clicks reduce the time it takes to complete transactions
- **Additional Avenues for Help**
 - Online help functionality provides real-time information and the ability to request assistance any time, from any page on the Gateway

Project Update

Key Updates Since We Last Met

Design/ Build & Testing

Added Design/Build iterations and successfully completed User Acceptance Testing (UAT)

Mock Go-Live

Successfully completed Mock Go-Live to confirm all technical system conversion steps and timing

Data Clean-up

Conducting email, phone and U.S. mail outreach to impacted Third Party Service Provider business users

Go-Live Prep

Increasing stakeholder communications and engagement activities in advance of the July 2nd go-live

Data Clean-up Overview

Third Party Service Provider Duplicate Email Accounts

Issue: Duplicate Email Accounts

Current State

- A subset of third party Service Provider business users currently **log in** to the Gateway **using their client's credentials** and have associated a single email address with each of these client business accounts.
- The **identity of the filer is not known** and their authorization to file on behalf of the business account is not documented.

Desired State

- Third party Service Provider business users should **establish a Service Provider account** and an **association** with each of their **clients' business accounts** in the Gateway.
- The **identity of the filer is known** and their authorization to file on behalf of the business account is documented.

Outreach Approach: Completed direct email, U.S. mail and outbound phone calls to all impacted third party Service Provider users. Partnered with OSCPA to communicate with impacted CPA users.

Preparing for Go-Live

Phase 1 Go-Live Weekend Activities



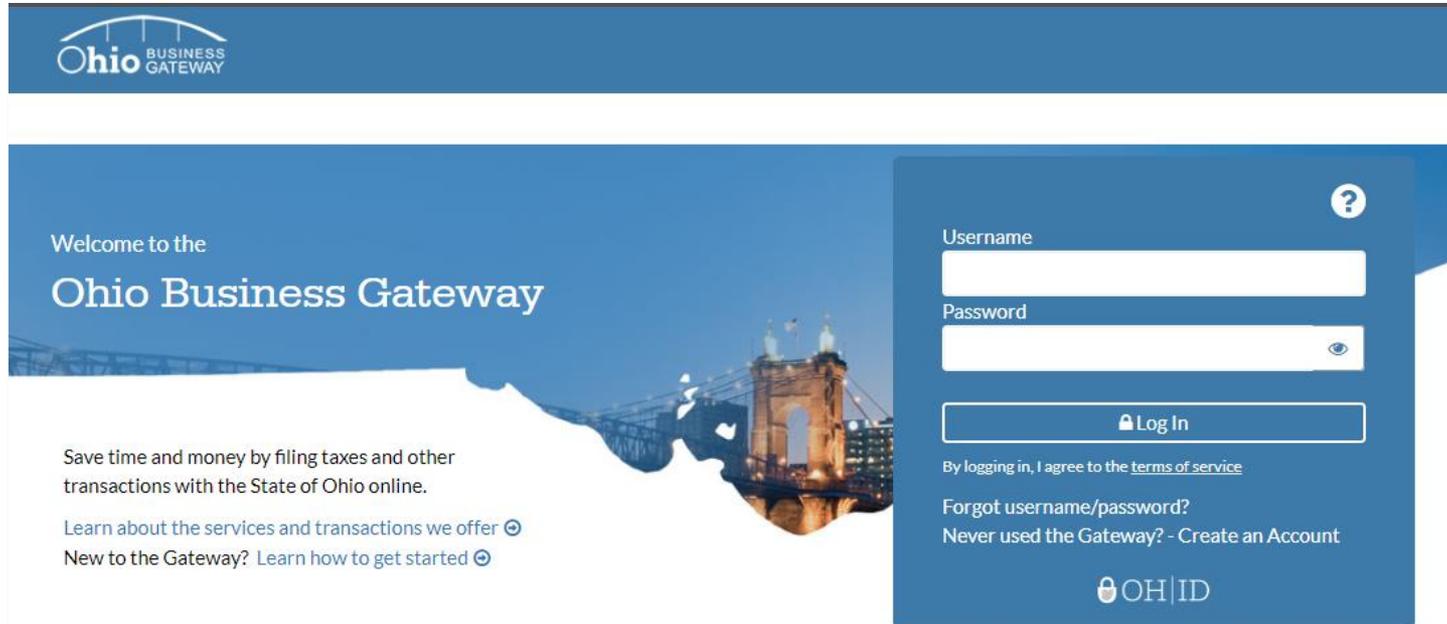
The Gateway will be unavailable from Friday, June 29th at 6 p.m. to Monday, July 2nd at 7 a.m.

Go-Live Weekend Details

- Gateway Modernization Project Team will be working to achieve key milestones
- Final Go/No-Go meeting will be held Sunday, July 1st
- In the event of critical issue during Go-Live, a rollback or contingency plan is in place

Preparing for Go-Live

A Look at the Modernized Gateway



The screenshot shows the Ohio Business Gateway login interface. At the top left is the Ohio Business Gateway logo. The main heading reads "Welcome to the Ohio Business Gateway". Below this, a message states: "Save time and money by filing taxes and other transactions with the State of Ohio online." Two links are provided: "Learn about the services and transactions we offer" and "New to the Gateway? Learn how to get started". On the right side, there is a login form with fields for "Username" and "Password", a "Log In" button, and links for "Forgot username/password?" and "Never used the Gateway? - Create an Account". At the bottom right of the form is the OH|ID logo.



The video thumbnail features a cartoon character in a suit pointing towards the login form. The text on the thumbnail reads "Welcome to the Modernized Gateway!".

Welcome to the Modernized Ohio Business Gateway!

As you can see, we have changed a lot about the Gateway, including the way you log in. You can still use your existing Gateway username and password to log in, but you will be prompted to create a new OH|ID account.

You will use the new OH|ID username and password you create to access the Gateway moving forward. Watch the video for more information on setting up your OH|ID account and accessing the modernized Gateway.

Preparing for Go-Live

A Look at the Modernized Gateway



Search

Welcome Phil!



My Business | Dashboard

Buckeye Eyewear

Go



[▶ New Transaction](#) [≡ In Progress ¹](#) [✓ Ready for Checkout ²](#) [Recent](#) [History ⁵](#) [Payments ³¹](#) [Reminders](#) [Announcements](#)

Quick Links

Has Something Changed?

Request Business Access

Clear Current Filters

Favorites

Show Favorites

Service Area

Employer Withholding

Ohio Withholding Registration



Ohio 2014 Payment of Income Tax Withheld



Sales and Use Tax

Consumer's Use Tax Registration



Seller's Registration



Preparing for Go-Live

Avenues for Help in the Modernized Gateway

Modernized Gateway Help Desk

- Additional help desk set up to field calls and answer questions related to access, permission and technical issues
- Change to help desk call routing process to more efficiently route callers to the appropriate help desk

Modernized Gateway Case Management System

- Business users will be able to submit questions online to the Gateway and Service Partner help desks 24/7
- Automatic routing and tracking of help cases will help answer business users' questions more efficiently

Helpful Content Repository

- 100s of articles, frequently asked questions, step-by-step job aids and video tutorials have been created and uploaded to the modernized Gateway

Business users can be directed to contact the **Gateway Help Desk via (866) OHIO-GOV (644-6468)** or electronically via the Gateway's online case management system.

Business User Communication

Communication Channels for Engaging and Preparing Business Users Throughout the Project Lifecycle



Gateway Gazette monthly newsletter distributed to **4,300+ business users** who have “opted in” to receive communications from the Gateway



Monthly email updates distributed to **350+ business-focused organizations** across Ohio reaching small business owners, corporate employees, service providers and entrepreneurs



Direct email campaign to the Gateway’s approximately 100 **highest volume** business user filers



Social media messages and articles in business association and State **business-focused agency publications**



Updates on **business.ohio.gov/gatewaymodernization** viewed by nearly 20,000 individuals annually

Business User Communication

Communication Channels to Prepare Business Users for Go-Live

	APPROACHING GO LIVE	AT GATEWAY GO-LIVE	POST GO-LIVE/ONGOING
DIRECT EMAIL	<ul style="list-style-type: none"> ✓ High-Volume Service Provider communication ✓ Business user communication prior to Gateway being taken offline 	<ul style="list-style-type: none"> • <i>Gateway Gazette</i> newsletter • Super User communication (opt-in email) • Email communication to business users with access to transactions with upcoming filing deadlines 	<ul style="list-style-type: none"> • “Waves” of business user email communication prior to post-Go-Live filing deadlines • <i>Gateway Gazette</i> newsletter • Super User communication (opt-in email)
ON GATEWAY MESSAGING	<ul style="list-style-type: none"> ✓ Messaging on Gateway 2.0 login page ✓ Messaging on business.ohio.gov and business.ohio.gov/gatewaymodernization ✓ Article in OSCPA newsletter 	<ul style="list-style-type: none"> • Video on gateway.ohio.gov homepage • Login and orientation video tutorials and guides linked on gateway.ohio.gov • Announcement posted in the modernized Gateway • Helpful content articles (e.g. FAQs, how-to guides, transaction overview descriptions) posted to the Help Center 	
PARTNERSHIP MESSAGING		<ul style="list-style-type: none"> • Social Media messages 	<ul style="list-style-type: none"> • Articles in Deferred Compensation and OSCPA newsletters • Social Media messages

Open Discussion & Suggestions

Ohio Business Gateway Modernization Project

Discussion & Suggestions

Steering Committee Members & Stakeholders

- Are there any questions or recommendations?
- Any additional items that should be discussed as a group?
- The suggestion box is provided for any additional ideas to incorporate

Thank You!

Contact the Ohio Business Gateway:



1 (866) OHIO-GOV (644-6468)