

**Montana Department of Revenue
Citizen Services Historical Processing Information
February 19, 2014**

Calls Answered by Month for Years 2009 Through 2013

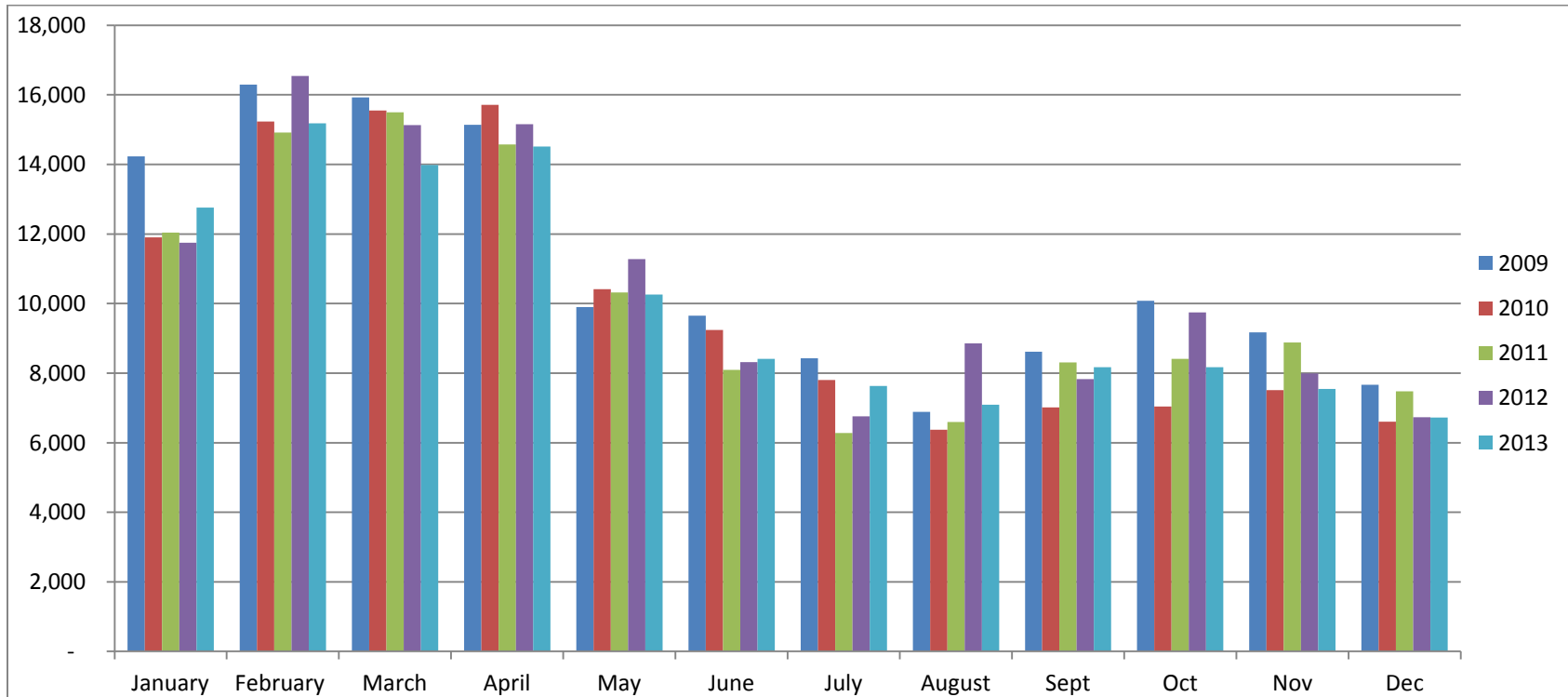


Chart Trends to Note

- Peak season for calls is January 15 through April 15 because of tax season.

- Small peak in calls September through November is due to the unclaimed property advertising. Note the decrease in 2013 due to the new Click for Cash service offered online this year.
- Overall decreasing trend in calls is due to improvements to the website and a writing project to clarify the department correspondence.
- Spike in calls for August through October 2012 are due to compliance initiatives for pass-through entities.

Calls Answered and Transferred

Year	Total Calls Answered	Percent of Calls Transferred
2009	132,004	21%
2010	120,395	24%
2011	121,384	24%
2012	126,072	24%
2013	120,033	24%

Percentage of Calls Transferred measures what percentage of the calls that Citizen Services cannot answer in the call center. These calls are transferred to others areas in the department or to other agencies because the call center gets calls that do not pertain to the Department of Revenue.

Unclaimed Property Claims Processed by Month for Years 2009 Through 2013

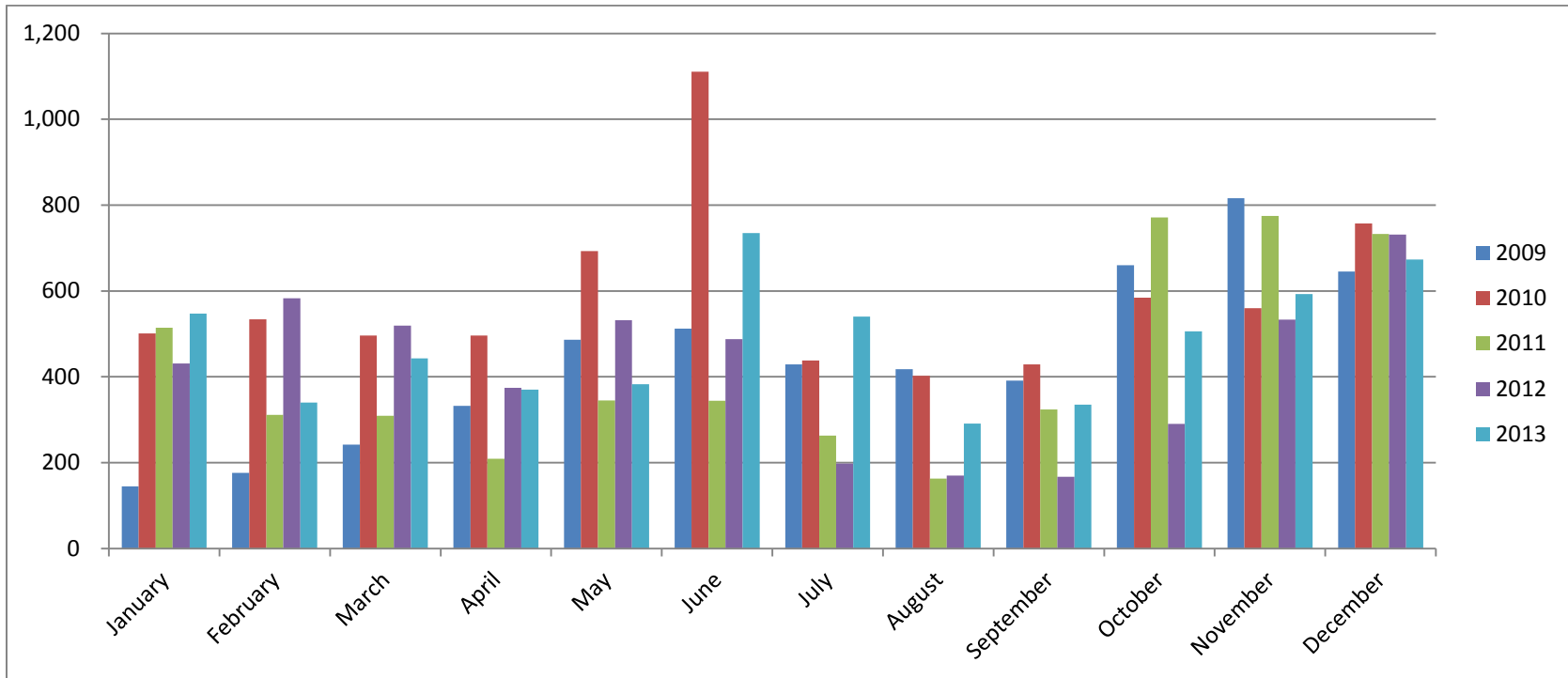


Chart Trends to Note

- During the summer months we crossmatch revenue records with property records to identify property that belongs to taxpayers and send the taxpayers a claim form. During the summer of 2010, we issued a large number of these letters to crossmatch the backlog of potential matches before we printed the publication in the fall, creating the spikes in May and June, shown in red on the chart.
- We rolled out the online claim service in April 2013 and this allowed us to process claims quicker, explaining in the spike in claims processed during June and July, shown in light blue. Since April 2013, we have received 43% of our claims online. This includes claims resulting from the crossmatch program.

Unclaimed Property Claims Paid by Source

Year	Total Claims Paid	Crossmatch Claims Paid	Customer Initiated Claims Paid	% Crossmatch Claims
2009	5,252	2,462	2,790	47%
2010	7,001	3,753	3,248	54%
2011	5,061	1,785	3,276	35%
2012	5,016	1,437	3,579	29%
2013	5,756	892	4,864	15%

- **Crossmatch Claims** are claims created by the department by comparing unclaimed property details to taxpayer records to identify property that belongs to taxpayers and we then proactively mail them a claim form. The claimant can now quickly claim their property online through a Quick Claim using a code from the letter we mail them. All property that was not claimed from these letters since 2009 will be crossmatched again starting 2014.