

STATEWIDE INTERNET



PORTAL AUTHORITY

# SIPA Presentation To: Sales and Use Tax Simplification Task Force



**Jack Arrowsmith**  
Executive Director

**Mike Whatley**  
Chief Technology Officer



## **About SIPA?**

- SIPA was created in 2004, by the Colorado Legislature to create technology solutions for State and Local Government
- Manage the Colorado.gov portal
- Procure innovative technology solutions
- Acquire the best pricing on behalf of Government
- Governed by a Board of Fifteen Directors appointed by the Governor and others



## **Benefits of SIPA?**

- Vetted partnerships-SIPA holds the master contracts
- No RFP process for you!
- Local representative and advocacy
- Experts serving Colorado for more than 13 years
- Saves it's customers approximately \$6.5 million annually through economies of scale



# **No-Cost Portal Solutions**

## **(In partnership with Colorado Interactive)**

- Payment Processing & Payment Integrations (Online & Over the Counter)
- Mobile Payments
- Event Registration
- Website Hosting on Colorado.gov
- Gov2Go
- Custom Payment Application Development

STATEWIDE INTERNET



PORTAL AUTHORITY

Supported by: Antero CRM



**Jack Arrowsmith**

Executive Director

(720) 409-5637

[jack@cosipa.gov](mailto:jack@cosipa.gov)

**Krista Erickson**

Partner

CRM Services, Salesforce,

Microsoft Dynamics

(303) 818.8892

[kerickson@anteroCRM.com](mailto:kerickson@anteroCRM.com)



## Sales Tax Application

- Comprehensive sales tax application developed for Colorado government
- Developed by the City of Grand Junction, which was frustrated by off-the-shelf sales tax applications, under auspices of Colorado government CPA
- Available to all Colorado government agencies



# SIPA & Antero CRM

- SIPA ([www.Colorado.gov/sipa](http://www.Colorado.gov/sipa))
  - Provides a suite of technology solutions to state and local government, special districts, K-12 and public higher education
  - Purchased intellectual property to sales tax system
- Antero CRM ([www.anteroCRM.com](http://www.anteroCRM.com))
  - Colorado corporation specializing in the design, agnostic selection, implementation and support of off-the-shelf CRM products
  - Salesforce and Microsoft certified consulting partners



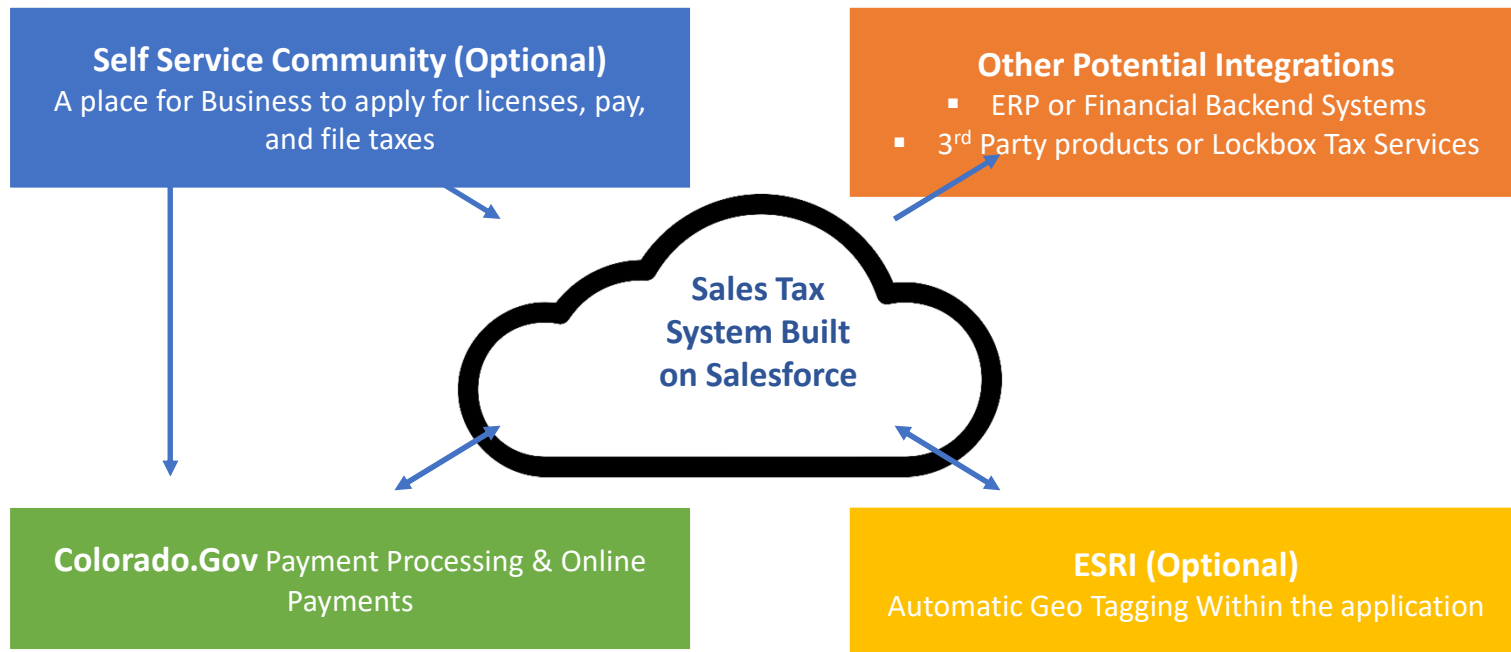
# Benefits of Sales Tax System







# Components Of The System





# Questions?



720-409-5634



sipa@cosipa.gov



@ColoradoSIPA



facebook.com/ColoradoSipa



Statewide Internet Portal Authority

[www.colorado.gov/sipa](http://www.colorado.gov/sipa)

**STATEWIDE INTERNET PORTAL AUTHORITY**



# For More Information

- Demo link available for 30 days at:
  
- Contact:
  - Mike Whatley, SIPA,
  - [mike@cosipa.gov](mailto:mike@cosipa.gov),
  - 720.409.5632
  
  - Shari Leigh, Antero CRM, [sleigh@anterocrm.com](mailto:sleigh@anterocrm.com),
  - 303.818.8892



## Welcome to the Sales Tax Portal

for the City of Grand Junction



View your account  
balance



Apply for a new  
sales tax license



File your  
sales tax return



Download  
forms





## Application

Home / Application

### Previous Applications

Application ID	Payment Date	Approval Date	Receipt No.
<i>All payments are made on Colorado.gov and may have additional fees</i>			
App - 1791		10/18/2017	Pay
App - 1788		8/24/2017	Pay
App - 1790		9/11/2017	Pay

### Start new Application

This wizard will help you complete your application for a new Sales Tax License for the City of Grand Junction. There is a non-refundable \$10 application fee that needs to be submitted before your application is complete. Click "Next" to continue.

Next

## Start new Application

\*Business Owner First Name

\*Business Owner Last Name

\*Trade Name / Doing Business As (DBA)

Where is your business physically located in Grand Junction?

\*Street

Attention / Care Of

\*City

\*State

\*Zip Code

Mailing Address  Same as Physical Location  
 Add separate mailing address

Previous

Next

## Submit Sales Tax Return Online

This wizard will help you submit your sales tax return online. After the return has been prepared, you will be directed to the colorado.gov payment processor. Please select a License Account, and then click "Next" to continue.

\*License  
Account

11904

Next

## Previous Returns

ID	Period Ending	Total Due	Receipt Number
<i>All payments are made at Colorado.gov and may have additional fees</i>			
11906 : F-158267	8/31/2017	\$47.87	<a href="#">Pay Now</a> <a href="#">Print Return</a>
11906 : F-158266	8/31/2017	\$52.05	<a href="#">Pay Now</a> <a href="#">Print Return</a>
11906 : F-158265	7/31/2017	\$40.24	<a href="#">Paid</a> <a href="#">Print Return</a>
11906 : F-158264	6/30/2017	\$26.58	<a href="#">Paid</a> <a href="#">Print Return</a>
11904 : F-158263	5/31/2017	\$15	<a href="#">Paid</a> <a href="#">Print Return</a>
11904 : F-158261	8/31/2017	\$54.08	<a href="#">Pay Now</a> <a href="#">Print Return</a>
11904 : F-158259	7/31/2017	\$48.99	<a href="#">Paid</a> <a href="#">Print Return</a>
11904 : F-158253	8/31/2017	\$0	<a href="#">Paid</a> <a href="#">Print Return</a>



## Tax Returns

[Home](#) / [Tax Returns](#)

### Submit Sales Tax Return Online

Total receipts from City activity must be reported and accounted for in every return including all sales, rentals and leases and all services both taxable and non-taxable.

1) Gross Sales and Service	<input type="text" value="1000"/>
2) Bad Debts Collected	<input type="text" value="0"/>

Click "Next!" to input allowable deductions.

[Previous](#) [Next](#)

### Previous Returns

ID	Period Ending	Total Due	Receipt Number
----	---------------	-----------	----------------

*All payments are made at Colorado.gov and may have additional fees*



## Tax Returns

Home / Tax Returns

### Submit Sales Tax Return Online

Total Receipts: \$1,000.00  
Total Deductions: \$0.00  
Total City Net Taxable Sales & Service: \$1,000.00  
Amount of City Sales Tax (2.75%): \$27.50

Previous

Next

## Previous Returns

ID	Period Ending	Total Due	Receipt Number
<i>All payments are made at Colorado.gov and may have additional fees</i>			
11906 : F-158267	8/31/2017	\$47.87	<a href="#">Pay Now</a> <a href="#">Print Return</a>
11906 : F-158266	8/31/2017	\$52.05	<a href="#">Pay Now</a> <a href="#">Print Return</a>
11906 : F-158265	7/31/2017	\$40.24	Paid <a href="#">Print Return</a>

## Tax Returns

Home / Tax Returns

### Submit Sales Tax Return Online

You are not eligible for a vendors fee and will be assessed additional charges for penalty and interest for filing late.

Amount of city sales tax: \$27.50  
Excess tax collected: \$0.00  
Lodging Tax: \$6.00  
Use tax: \$2.75  
Adjusted city tax: \$36.25  
Penalty: \$15.00  
Interest: \$1.63

Previous

Next

### Previous Returns

ID	Period Ending	Total Due	Receipt Number
----	---------------	-----------	----------------

All payments are made at Colorado.gov and may have additional fees

11906 - F-158267	8/31/2017	\$47.87	
------------------	-----------	---------	--

Pay Now

Print Return

## Tax Returns

[Home](#) / [Tax Returns](#)

### Submit Sales Tax Return Online

**Final Summary** - Please make sure to review all final numbers below. Once you hit **'Next'** you will not be able to make changes without our assistance. If anything is incorrect, please hit **'Previous'** and make any corrections necessary.

Total Receipts: \$1,000.00  
Total Deductions: \$0.00  
Total Sales Tax: \$27.50  
Lodging Tax: \$6.00  
Excess Tax Collected: \$0.00  
Vendors Fee: \$0.00  
Use tax: \$2.75  
Total Taxes due: \$36.25  
Penalty: \$15.00  
Interest: \$1.63  
Additional Charges: 0.00  
Credits applied: 0.00  
Total Due and Payable: \$52.88



















Once you hit **'Next'** you will not be able to make changes without our assistance. If anything is incorrect, please hit **'Previous'** and make any corrections necessary.

Previous

Next

## Forms

Home / Forms

Document Name	
 Certificate of Taxes Due	<a href="#">Download</a> 
 Affidavit of Non-Taxable Sale	<a href="#">Download</a> 
 Initial Use Tax Return with Instructions	<a href="#">Download</a> 
 Special Event Registration and Tax Return	<a href="#">Download</a> 
 Sales Tax Chart	<a href="#">Download</a> 
 Construction Materials Use Return	<a href="#">Download</a> 
 Account Change and Closure Form	<a href="#">Download</a> 
 Occasional Sale Declaration	<a href="#">Download</a> 
 How to Document Tax Exemptions	<a href="#">Download</a> 



Search... Search

Sandbox: GJTesting

Gary Bergos Setup Help & Training Sales Tax Processing

Home Accounts Contacts Batches Filings Payments Applications Assessments Run Documents Reports Portal Content Change Requests +

Messages and Alerts

Gary Bergos  
Wednesday November 1, 2017

Discover Winter '18

Shortcut

Unresolved Items

Show Feed

Set up a new STL Start a new Batch Run Assessments New Applications Reports

Recent Items

- Mike Whatley
- Golf Plus
- Test Account 3/2/2016
- AR-00417
- 100542
- E-158267
- P-10115
- CMT-00027
- Scuba Plus
- App - 1791

Custom Links

Admin Links

Batch Create Periods

Recycle Bin

My Tasks

New

Unresolved Emails Overdue

You have no open tasks scheduled for this period.

Chat

**Messages and Alerts**

**Shortcut**

- Unresolved Items

**Recent Items**

- Mike Whatley
- Golf Plus
- Test Account 3/2/2016
- AR-00417
- 100542
- E-158267
- P-10115
- CMT-00027
- Scuba Plus
- App - 1791

**Custom Links**

- Batch Create Periods

**Admin Links**

- Recycle Bin

### New STL Application

#### Master Account Lookup

! = Required Information

Does the applicant already have a Master Account set up in Salesforce for another business? If so, please lookup the Master Account record. Otherwise, leave it blank and one will be created for you.

Master Account (Optional)

#### Owner

Business Owner First Name

Business Owner Middle Name

Business Owner Last Name

An Email address will be required before this person can receive online access.

Email

#### Address

Company Name/Trade Name/DBA

Business Location Street

Business Location City

Business Location State

Business Location Zip

Business Location Phone

EIN/SSN

Mailing Street

Mailing City

Mailing State

Mailing Postal Code

Accounting Phone

#### Business Information

State of Colorado Sales Tax Account Number

Initial year of business

Starting Date of Retail Sales in Grand Junction

Initial Billing Date



Search...

Search

Sandbox: GJTesting

Gary Bergos

Setup

Help & Training

Sales Tax Processing

- Home
- Accounts
- Contacts
- Batches**
- Filings
- Payments
- Applications
- Assessments Run
- Documents
- Reports
- Portal Content
- Change Requests

### You are working on Batch 100543

Batch Owner	Gary Bergos
Batch Created	11/1/2017 8:02 AM
Batch Date	11/1/2017
Number of Sales Tax Returns on this Batch	0

Total Payments for this Batch

Post Batch

### Tax Returns on this batch

### Select a Sales Tax License Account

One time

Search:

Show 10 entries

License Number	Account	Frequency	FEIN	
000001	License Account Test 1			Select
000002	License Account Test 2			Select
000003	License Account Test 3			Select
000004	License Account Test 4			Select
000005	License Account Test 5			Select
000006	License Account Test 6			Select
000007	License Account Test 7			Select
11428	Microline Surgical Inc	Quarterly	04-2974225	Select

**You are working on  
Batch Number 100543**

Batch Owner	Gary Bergos
Batch Created	11/1/2017 8:02 AM
Batch Date	11/1/2017
Number of Sales Tax Returns on this Batch	0
Batch Payment Total	

**Input Sales Tax Return for Ski Plus**

License Number: 11904      Account Balance: 1221.96  
 Filing Frequency: Monthly  
 Filing Period:

**Credits**

There are currently no credits on this account

**Charges**

Apply	Amount	ID	Reason Code
<input type="checkbox"/>	54.08	ID-11163	COMMUNITY
<input type="checkbox"/>	15.00	ID-11166	COMMUNITY
<input type="checkbox"/>	52.88	ID-11181	COMMUNITY

**Failure to File Fees**

There are currently no fees to abate

(1) Gross Sales/Serv	<input type="text" value="0.00"/>
(2A) Bad Debts Coll:	<input type="text" value="0.00"/>
<b>Total</b>	
(3A) Service Sales	<input type="text" value="0.00"/>
(3B) Sales to Others	<input type="text" value="0.00"/>
(3C) Sales Out-of-Town	<input type="text" value="0.00"/>
(3D) Bad Debt ChgOff	<input type="text" value="0.00"/>

(4) City Net Taxable	
(5) Amt Sales Tax 2.75%	
(6) Excess Tax Coll	<input type="text" value="0.00"/>
Amt Subject to Lodging Tax	<input type="text" value="0.00"/>
(7) Lodging Tax	
<b>Adjusted Total</b>	
(8) Vendor Fee	<input type="checkbox"/>
Lodging VF	<input type="checkbox"/>

Total Sales Tax




Messages and Alerts

## Notice of Assessments

Assessments should be run on the 5th of each month. Click "Run Assessments" to generate charges/credits for any filing period that has not been paid in full.











Shortcut

 [Unresolved Items](#)

The Pending Assessment Report shows a list of all License Accounts that will be included in the PDF for printing. You can drill into the report details to manually edit any charges as desired.

[View Pending Assessment Report](#)


Recent Items

-  100543
-  Mike Whatley
-  Golf Plus
-  Test Account 3/2/2016
-  AR-00417
-  100542
-  E-158267
-  P-10115
-  CMT-00027
-  Scuba Plus

Custom Links

Admin Links

[Batch Create Periods](#)

 [Recycle Bin](#)

Messages and Alerts

Assessment Run AR-00307

Customize Page | Edit Layout | Printable View | Help for this Page

Notices (5+)

Shortcut

Unresolved Items

Assessment Run Detail

Edit Delete Clone PDF View

Assessment Run Name AR-00307

Owner Tatiana Gilbertson [Change]

Created By Tatiana Gilbertson, 10/16/2015 12:24 PM

Last Modified By Tatiana Gilbertson, 10/16/2015 12:24 PM

Edit Delete Clone PDF View

Recent Items

- AR-00307
- Krista Erickson
- Master - Vertiba Master Account
- Howard Jones (Sample)
- Todd Atkinson
- Master - test
- Scarlet Davis
- Gary Bergos
- Bergos Consulting
- Tatiana Gilbertson

Notices

New Notice

Notices Help ?

Action	Notice ID	License Account	Total Amount Due
<a href="#">Edit</a>   <a href="#">Del</a>	N-9922	The Cashmere Slippers Gourmet and Comfortable Food	\$1,118.04
<a href="#">Edit</a>   <a href="#">Del</a>	N-9927	DishOne Satellite LLC	\$2,200.00
<a href="#">Edit</a>   <a href="#">Del</a>	N-9928	Ararity Designs and Decor	\$15.00
<a href="#">Edit</a>   <a href="#">Del</a>	N-9929	All Trades Carpet and Flooring LLC	\$1,115.00
<a href="#">Edit</a>   <a href="#">Del</a>	N-9930	BORDER STATES ELECTRIC SUPPLY	\$15.33

[Show 5 more »](#) | [Go to list \(50+\) »](#)

Back To Top

Always show me more records per related list

Custom Links

Admin Links

Batch Create Periods

Recycle Bin

Chat



City of Grand Junction  
 Revenue Division  
 250 N. 5th Street - PO Box 1809  
 Grand Junction, Colorado 81502

Phone: (970) 244-1521  
 Fax: (970) 256-4078  
 Web: www.gjcity.org

**NOTICE OF TAX ASSESSMENT**

The Cashmere Slippers Gourmet and Comfortable Food  
 168 Sun Hawk Dr  
 Grand Junction, Colorado 81503  
 United States

**Date of Notice:** 10/16/2015  
**Account Number:** 11453  
**Due Date:** 10/20/2015

*This assessment is made in accordance with section 3.12.390 of the City of Grand Junction Municipal Code. The notice of assessment is due to the failure to file required sales tax returns for the above referenced account. The tax listed below is an estimate only and actual returns and sales tax due must be filed in order to satisfy the delinquency.*

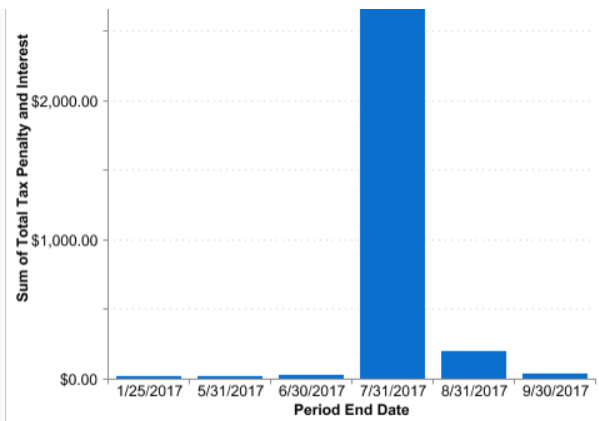
**MISSING RETURN SCHEDULE**

Period Covered	Tax	Penalty	Interest	Total	Paid	Amount Due	Reason Code*
TOTAL AMOUNT DUE						\$ 1,118.04	

*Reason Code	Comment
Failure to File	The City did not receive a tax return. A tax return must be filed even if no tax was collected. Please respond to this notice by filing the actual return with payment for the period(s) covered as indicated above. <b>Please note that penalty and interest are due on late returns. See line 12 of the sales tax return for calculation instructions.</b>
Return Filed Late	Tax return was filed late. Penalty and interest were assessed. Please pay amount due now or add it to line 14a of your next return.
Error in calculation	Full payment was not received or an error in calculation of tax occurred. Please pay amount due now or add it to line 14a of your next return.

**If you feel you have received this notice in error, please contact our office immediately at 970-244-1521**





Edit Large | Medium | Small

Filtered By: [Edit](#)  
 Period End Date greater than 1/1/2017 [Clear](#)

	TIF Zone	Account Name		Period End Date						Grand Total
				1/25/2017	5/31/2017	6/30/2017	7/31/2017	8/31/2017	9/30/2017	
<input type="checkbox"/>	-	ANTERO TEST	Sum of (7) Lodging Tax	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
			Sum of Total Tax Penalty and Interest	\$0.00	\$0.00	\$0.00	\$0.00	\$42.91	\$39.88	\$82.79
		Golf Plus	Sum of (7) Lodging Tax	\$0.00	\$0.00	\$0.00	\$0.00	\$15.00	\$0.00	\$15.00
			Sum of Total Tax Penalty and Interest	\$0.00	\$0.00	\$26.58	\$40.25	\$99.92	\$0.00	\$166.75
		Microline Surgical Inc	Sum of (7) Lodging Tax	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
			Sum of Total Tax Penalty and Interest	\$15.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$15.00
		Ski Plus	Sum of (7) Lodging Tax	\$0.00	\$0.00	\$0.00	\$6.00	\$0.00	\$0.00	\$6.00
			Sum of Total Tax Penalty and Interest	\$0.00	\$15.00	\$0.00	\$170.84	\$54.08	\$0.00	\$239.92
		<b>Subtotal</b>	Sum of (7) Lodging Tax	\$0.00	\$0.00	\$0.00	\$6.00	\$15.00	\$0.00	\$21.00
			Sum of Total Tax Penalty and Interest	\$15.00	\$15.00	\$26.58	\$211.09	\$196.91	\$39.88	\$604.46
<input type="checkbox"/>	TIF District 1	Tatiana.test 2 M	Sum of (7) Lodging Tax	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
			Sum of Total Tax Penalty and Interest	\$0.00	\$0.00	\$0.00	\$2,658.34	\$0.00	\$0.00	\$2,658.34
		<b>Subtotal</b>	Sum of (7) Lodging Tax	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
			Sum of Total Tax Penalty and Interest	\$0.00	\$0.00	\$0.00	\$2,658.34	\$0.00	\$0.00	\$2,658.34
		<b>Grand Total</b>	Sum of (7) Lodging Tax	\$0.00	\$0.00	\$0.00	\$6.00	\$15.00	\$0.00	\$21.00
			Sum of Total Tax Penalty and Interest	\$15.00	\$15.00	\$26.58	\$2,869.43	\$196.91	\$39.88	\$3,162.80

