

Gateway Forum Meeting Responses

Meeting Date: August 27, 2018

The OBG Team is committed to continued discussions and collaboration with interested parties and stakeholders including review and prioritization discussions on proposed enhancements. A follow up meeting was held at Oatney & Associates with Vicky Collins, who provided constructive feedback and was instrumental in leading the meeting discussion. The group was able to discuss many of the challenges and recommendations brought forth.

- 1. Discussion Topic:** The group believes that the receipt/report provided at transaction checkout is missing information that is helpful for audit history purposes. Under the current system, users navigate to the History tab to locate the detailed receipt/report

Response: This issue has been noted as a system enhancement request and will be considered for potential future implementation. DAS appreciates this feedback.

There is an existing FAQ around how to find transaction history on the [gateway.ohio.gov FAQs page](http://gateway.ohio.gov/FAQs) (see Appendix Image 1). Based on feedback from this session, the language of this FAQ was updated to note that “detailed transaction receipts” are also located on the History tab, not just transaction history.

- 2. Discussion Topic:** For the Department of Job and Family Services (JFS), the last 4 digits of the SSN should be displayed. Allowing for alphabetical sorting may improve user experience.

Response: Additional follow-up discussions are needed between the Gateway and JFS to validate this timeframe. However, these issues have been noted as system enhancement requests and are being targeted for a Fall 2018 implementation. DAS appreciates this feedback.

3. Discussion Topic: Some Service Providers who shared credentials (usernames and passwords) with their clients in the previous system experienced an issue where, if the client logged in to the modernized Gateway first, they “claimed” the account and had access to the Service Provider’s accounts, wage information, etc.

Response: This is a consequence of Gateway users sharing credentials with their clients, and there was no way systemically to identify who these users were before go-live of the modernized Gateway. Additionally, this practice posed significant security risks to both Service Providers and their clients, even before implementation of the modernized system. For example:

- The client representative has no control over the filings that the Service Provider is completing on their behalf.
- The system will record that client is completing the filing, not the Service Provider who is completing the filing on their behalf. There is a lack of a reliable audit trail, which could lead to challenges during an investigation as well as possible legal implications.
- If the client decides that they no longer wish for the Service Provider to access their account, it may be difficult to reset the password and/or remove the Service Provider’s access.
- Both the client and the Service Provider have the same security access/permissions, meaning one could lock the other out of the account and make password reset difficult or impossible.
- As additional security measures (e.g. identity proofing) are introduced, both Service Providers and their clients may encounter significant barriers to accessing their accounts.
- With OH|ID, as new systems are added, both Service Providers and clients will have access to all the systems that the account has registered for.

In the event this issue occurs, there is a solution in place to revoke client and/or Service Provider access and properly associate individual client and Service Provider OH|IDs with business accounts, but it is high-touch and requires contact with the Gateway Help Desk.

To avoid this issue, users should never share OH|ID credentials with each other. There is an existing FAQ related to creating separate Service Provider and client OH|IDs on the [gateway.ohio.gov FAQs page](https://gateway.ohio.gov/FAQs) (see Appendix Image 2).

4. **Discussion Topic:** When two users with separate OH|ID credentials are logged in at the same time and are filing separate tax types for the same client, the Business Account dropdown changes to show what the other user is working on.

Response: The development team has tested this scenario (used two separate OH|ID usernames and passwords to log in at the same time and start separate filings for the same client) and have been unable to recreate it. If this occurs again, please contact the Help Desk immediately which will allow us to diagnose the cause and identify a solution.

5. **Discussion Topic:** “Attendees reported losing time assisting their clients while navigating permission set-up.”

Response: Currently, there are several FAQs on the [gateway.ohio.gov FAQs page](https://gateway.ohio.gov/FAQs) related to this topic with links to detailed video tutorials and step-by-step instructions to assist users in navigating this process. Additionally, video tutorials and PDF guides containing step-by-step instructions with screenshots are located in the Gateway’s Help Center. They can be accessed by typing key words such as “access” into the Search bar. These materials and FAQs are being reviewed and will be updated to make them easier to follow (see Appendix Images 3a, 3b and 3c).

6. **Discussion Topic:** Users understand the idea behind having online help cases, but they do not have access to any notes or ability to ask questions.

Response: The Gateway Help Desk is in the process of developing and implementing business processes that will more clearly document for business users the status and next steps of their help case.

7. **Discussion Topic:** Users experience issues with system speed.

Response: System performance was an issue in the first couple of weeks post-launch. Changes were made to address the underlying causes, and current data shows that the median overall time to complete a filing at any time of the day is 6 minutes.

- 8. Discussion Topic:** System features are small and hard to read. In addition, users would prefer to select the client first as opposed to at the end to ensure they are filing for the right client.

Response: The system was designed with 14-point font size, which is an industry standard for web applications. The system also supports browser magnification. The team is developing an FAQ on how to use browser magnification. A user should always select a client account before starting a transaction by using the Business Account dropdown – the request described reflects current system functionality.

- 9. Discussion Topic:** For JFS, add the ability to search by employee roster.

Response: The ability to sort the “Report of Wages” screen by Last Name on the Gateway is currently being developed.

- 10. Discussion Topic:** For Sales Tax, the previous system allowed for entering of School District/Sales on one screen. In the modernized system, this is on 5-8 screens and “select county” is now on 12 screens. These should be streamlined or make it so that users can see the alphabet at the top of the page and pick from it.

Response: The counties do appear in alphabetical order. The request to increase the font size of the county drop down list will be considered for potential future implementation. If the user is not seeing the drop-down list in alphabetical order, additional information will be needed in order to research the specific user information that is experiencing the challenge.

- 11. Discussion Topic:** For School District, there are now five screens.

Response: This change was made as a part of mobile-responsive design. If all information is consolidated on one long page, it is very difficult to view or complete on a tablet, smart phone, etc. Additionally, consolidating all information onto one page will increase the load time for the page.

- 12. Discussion Topic:** For Net Sales, there are 2-3 screens and they now auto-populate, which is good. However, Municipal Withholding should be streamlined.

Response: Four system enhancement requests related to the Municipal Withholding transaction have been noted and will be considered for potential future implementation. Additional information is needed on what is meant by “streamlined” in order to confirm specific enhancement requests meant by this comment are documented.

13. Discussion Topic: Automatic log out is not working. Users stayed logged into the system all day.

Response: This was identified as a system defect and was fixed in the Production environment on August 28, 2018. The automatic log out time is now 15 minutes.

14. Discussion Topic: Need assistance navigating history and recent history.

Response: This issue of access to “recent history” was a challenge shortly after go-live, but has since been resolved. In addition, for accounts with extensive history from the previous system, history was not loading. To resolve this, the “Click here to see more history” button was added. There is an existing FAQ around how to find transaction history on the [gateway.ohio.gov FAQs page](#) (see Appendix Image 4).

15. Discussion Topic: The cart shows items are in the cart after checkout.

Response: This issue has been noted as a system enhancement request and will be considered for potential future implementation.

16. Discussion Topic: For JFS, a user reported there is a browser issue.

Response: Some browsers, including Internet Explorer, are not supported by the Gateway. Users are encouraged to download the newest version of their preferred browser for the most optimal experience. Using an unsupported or outdated browser may cause system usage issues. In addition, representatives from JFS, Taxation and the Gateway Help Desks have identified situations where users used their browser’s “Back” and “Forward” buttons, which is not supported due to the nature of the transactional system. An FAQ related to supported browsers is being developed.

17. Discussion Topic: Banking information is currently stored through a vendor with PCI compliance. Users would like the option to store banking information but it should not be required.

Response: This functionality (the option to store banking information) is slated for implementation with Phase 2 of the Gateway Modernization Project.

18. Discussion Topic: CPAs would like the opportunity to provide feedback on similar projects in the future prior to go-live.

Response: Users, including CPAs, were invited to test out and provide feedback on the modernized Gateway prior to go-live during the “Kick the Tires” session. Due the nature of the modernization, it was not possible to have both the old and new system live at the same time. We will invite users to participate in testing on future enhancement deployments.