The Carnegie Mellon University (CMU) tax reporting process was formerly described as challenging, stressful, confusing, complicated, and inefficient. CMU’s Taxation Department reevaluated and reengineered the university’s IRS Form 990 and Form 990-T information collection process, which resulted in an improved, streamlined process. The innovative and creative thinking of this team not only enhanced their information collection process, these enhancements decreased compliance risk, and made the process more accessible for stakeholders.

REENGINEERING TAX REPORTING FOR GREATER RETURNS

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STAKEHOLDER FEEDBACK

“Thanks for the incredibly simple process. This is the easiest one of these I’ve had to do!”

“I just completed the form. Way more user-friendly!”

CONTINUING TO REENGINEER

- In-depth review of the university’s recurring UBI income sources
- Simplification of current escheatment process
- Update/refresh the Business and Travel Expense Policy and process