Commonwealth of Massachusetts

Travel Authorization Form (TAF)

1. Date of Request	2. Travel Request #	3. Department/Division	4. DEPT/ORGN:	5. Appropriation #
06/08/26		A&F IT		1100-1700

6. Name of Traveler	7. Title	8. Dates of Travel
Heather L Bloom	GeniSys QA Lead	From: 08/04/26 To: 08/07/26

9. Travel Itinerary and Justification

To attend the annual 2026 Revenue Agency Customer Conference (RACC) in St. Louis MO. RACC showcases new products and provides updates for the GenTax system (GeniSys). A&F has been sending managers/leads to attend annually since its inception to gain insights and share best practices with other revenue agencies across the world who use the same tax system. This year's agenda focuses on: IRS Direct File pilot program, E-services and customer engagement, Best practices for change management, Other FAST innovations to keep your agency up to speed. See attached for the agenda.

Attached supporting documentation (conference agendas, brochures, etc.)

10. Expenses

	Personal Funds	MA State Funds	Federal Funds	Other (describe in #12)
Transportation: (check all that apply) ☐ Rail ☐Bus ☑Airfare ☐Car: ☐ State ☐Personal ☐Rental ☑Taxi ☐Other:		$ 685.00		
Lodging: The Drury Hotel 4 days - 3 nights		$ 585.00		
Meals: Out of State Meals x 4		$ 158.00		
Other: (please list): Registration fee		$ 100.00		
Subtotal	$ 0.00	$ 1,528.00	$ 0.00	$ 0.00

Grand Total: $ 1,528.00

11. Certifications and Authorizations (See G.L. c. 30, §25B)

I hereby certify under the pains and penalties of perjury that, to the best of my knowledge, the above information is true and correct.

Signature of Traveler: Heather Bloom — Date: 06/30/2026

I hereby certify that sufficient funds are available for the above described travel accommodations.

Signature of Agency CFO: Robin Healey — Date: 06/30/2026

I hereby authorize the anticipated travel described above and related expenses listed in this form.

Signature of Traveler's Appointing Authority: Matthew J. Gorzkowicz — Title: Secretary, EOANF — Date: July 28, 2026

I hereby authorize the anticipated travel described above and related expenses listed in this form.

Signature of the Traveler's Cabinet Secretary — Date

12. Travel Funded By Private Entity, Foreign Government Entity, or Federally Recognized Tribe:

Travel Funded By Private Funds: ☐Yes ☐No

If Yes: $_____ Source (Contact Information):_____

TRAVEL FUNDED BY PRIVATE SOURCES MUST BE DISCLOSED TO AND AUTHORIZED BY APPOINTING AUTHORITY PURSUANT TO 930 CMR 5.08 (2)(d)(1). FOR THE APPROPRIATE FORM GO TO: https://www.mass.gov/disclosure-forms

13: Upon final approval, the Cabinet Secretary shall ensure that a copy of this form is distributed to:

☐ **A&F Budget Director & The Office of the Comptroller (please check once complete)**

TRAVEL AUTHORIZATION FORM (Form TAF) - INSTRUCTIONS

1. Date of Request: Date the form is executed by traveler. Approval of this form is required in advance of travel, except in extraordinary circumstances.
2. Travel Request #: Departmental Fiscal Officer may insert internal control or sequence number for audit/tracking purposes.
3. Department/Division: Insert the name of your department and division.
4. DEPT/ORGN: Insert traveler's Departmental MMARS three-letter code and four-digit Organization Number.
5. Appropriation Number: Insert the appropriation number against which travel purchases are to be encumbered and expended.
6. Name(s) of Traveler(s): List names of traveler(s) traveling on the same itinerary.
7. Title(s): Position/Title of each traveler.
8. Dates of Travel: List the departure and return dates of travel.
9. Travel Itinerary and Justification: The traveler should provide the destination and a brief summary of the trip itinerary. State the sponsoring organization. Supporting documentation may be attached.
10. Expenses:
    a. Personal Funds: Indicate the amount of personal funds that are to be used and for which reimbursement will not be sought.
    b. MA State Funds: Indicate the total funds that will be expended by the Department on behalf of the state employee traveler, either in direct payment to a travel service vendor, charge account vendor, or through employee reimbursements.
    c. Federal/Other State Funds: Indicate the total funds that will be expended by the federal government or another state on behalf of the state employee traveler, either in direct payment to a travel service vender, charge account vendor, or through employee reimbursements.
    d. Transportation: Include the total round-trip travel fare for a common carrier (air, rail bus, etc.). If using a personal vehicle, indicate the rate per mile that is reimbursable under the relevant provisions of current Collective Bargaining Agreements for union members or applicable Rules for non-union employees.
    e. Lodging: Include the total hotel room and tax expenditure. Use more than one line if more than one hotel property is used.
    f. Meals: Indicate the total reimbursable amount for meals. It is not necessary to break out the individual amounts for each meal. This will be accounted for in attached receipts and departmental internal control procedures.
    g. Other: State type and amount of any anticipated expenses not otherwise named, such as telephone calls.
    h. Sub Total: Total the dollar expenditure expected for each column.
    i. Grand Total: List the grand total for the trip. (The sum of the sub totals for Personal Funds, MA State Funds, and Federal/Other State Funds)
11. Certifications and Authorizations: In accordance with state law, the traveler must receive approval from the appointing authorities and officers listed in this form. Approval is required in advance of travel, except in extraordinary circumstances.
12. Travel Funded By Private Entity, Foreign Government Entity, or Federally Recognized Tribe: A state employee may not accept an offer from a private entity or individual, foreign government entity, or federally recognized tribe subsidizing travel and related expenses worth $50 or more unless an exemption applies under the conflict of interest law, M.G.L. c. 268A, §§3, 23(b)(2) and 23(b)(3), and related regulation 930 CMR 5.05(2). An exemption may apply if the employee makes the proper disclosure and his or her appointing authority determines that the travel will serve a legitimate public purpose that is not outweighed by a private benefit. See 930 CMR 5.08 (2)(d)(1). Disclosure of private funding on the TAF alone will not meet the requirements of the state conflict of interest law. The State Ethics Commission has developed a form that should be used for both the disclosure and determination. Go to https://www.mass.gov/disclosure-forms.
13. Distribution to A&F and CTR: Per M.G.L. Chapter 30, Section 25B, approval shall be filed with the A&F Budget Director and the Office of the Comptroller. To ensure compliance, approving authorities can now send digital copies to TAF@mass.gov to ensure both offices receive approved TAFs. Copies can also be sent physically to both offices, if preferred.

WEDNESDAY, AUGUST 5

10:00 AM - 4:00 PM	Registration & Information Desk	Grand Ballroom Foyer
12:00 PM - 1:00 PM	Lunch	Grand Ballroom ABC
1:00 PM - 1:15 PM	RACC Welcome & Opening Session	Grand Ballroom DEF
1:15 PM - 2:45 PM	Keynote Presentation: FAST Company & Product Update	Grand Ballroom DEF
2:45 PM - 3:00 PM	Afternoon Break	Grand Ballroom Foyer
3:00 PM - 4:00 PM	General Session - You Have a Dream! I Have an Action! Leading an IT Project When Others Don't Believe	Grand Ballroom DEF
4:00 PM - 5:30 PM	Demo Hall	Grand Ballroom Foyer
4:00 PM - 7:00 PM	Reception	Grand Ballroom ABC

THURSDAY, AUGUST 6

8:00 AM - 5:00 PM	Registration & Information Desk	Grand Ballroom Foyer
8:00 AM - 9:00 AM	Breakfast	Grand Ballroom ABC
9:00 AM - 12:00 PM	**Business Breakouts:** - By the Data, for the People: Enhancing Taxpayer Lives through Interdisciplinary Tech Collaboration - Is Testing Testing Your Resources? - FTI Data: Leveraging GenTax to Improve Customer Experience While Maintaining a Secure Environment	Grand Ballroom DEF
9:00 AM - 12:00 PM	**Tech Breakouts:** - Security Team Updates - FAST Technical Team Updates - FAST Hosting Services	Regency Ballroom C
12:00 PM - 1:00 PM	Lunch	Grand Ballroom ABC
1:00 PM - 2:00 PM	**General Session –** Pennsylvania Department of Revenue Pre-filled Return Pilot Program	Grand Ballroom DEF
2:00 PM - 3:00 PM	**General Session –** One Customer, Many Channels: Ohio's Contact Center Implementation	Grand Ballroom DEF
3:00 PM - 3:15 PM	Afternoon Break	Grand Ballroom Foyer
3:15 PM - 4:30 PM	**General Session –** Unlocking Capabilities You Already Own	Grand Ballroom DEF
4:30 PM - 5:00 PM	**General Session –** Conference Wrap-Up	Grand Ballroom DEF
6:00 PM - 10:00 PM	RACC Evening Event	Missouri Botanical Gardens

General Session Descriptions

General Session – RACC Welcome & Opening Session

Description: Join your 2026 RACC Chairperson, Patric Star, as he uses his own unique style to kick off the event! This session will set the stage for the Keynote Presentation by Martin Rankin.

General Session – Keynote Presentation: FAST Company & Product Update

Description: FAST has been working hard to bring you new features and developments. FAST Managing Partner Martin Rankin will share an exclusive overview of recent FastCore updates-and what's visible on the horizon.

General Session – You Have a Dream! I Have an Action! Leading an IT Project When Others Don't Believe

Description: This session tells the story of the Nevada project that many believed couldn't be done—until it was. Through confidence in the FAST solution, strong partnerships, and disciplined execution, skepticism turned into success. Hear how you can challenge assumptions, manage doubt, and shift mindsets. It is about the realization of dreams, setting and obtaining goals, and what is most important when leading a team to success.

General Session – Pennsylvania Department of Revenue Pre-filled Return Pilot Program

Description: As part of the Pennsylvania Department of Revenue's continued commitment to improving customer service, the department launched a new Fast File initiative during the recent personal income tax season. The pilot program offered eligible Pennsylvanians a free and simplified way to file their Pennsylvania Personal Income Tax Returns (PA-40s). The presentation will cover Pennsylvania's approach to implementing the program, the results of the pilot, and plans for expansion.

General Session – One Customer, Many Channels: Ohio's Contact Center Implementation

Description: This session provides an inside look at Ohio's implementation of a multi-channel contact center designed to support and track customer interactions at scale. Learn how the state integrates in-person service, phone support, web inquiries, and live chat into a unified contact center experience. Attendees will gain insight into how this approach enhances visibility into cross-channel contact history and simplifies the disclosure process to support efficient, consistent taxpayer service.

General Session – Unlocking Capabilities You Already Own

Description: We regularly see interesting ideas and challenges emerge from across our client base. While Tax has been the foundation, many of the capabilities in GenTax originated in other business lines and are now being applied in new ways. This panel will focus on how Tax agencies are implementing features that originated elsewhere to solve real operational problems.

Business Breakout Descriptions

By the Data, for the People: Enhancing Taxpayer Lives through Interdisciplinary Tech Collaboration

Description: Learn how Colorado leveraged existing software and data, focusing on human-centered design, to return millions to its residents by using the power of the Discovery manager and Taxpayer Access Portal for more than just billing. Get high-level explanations of how we put the project together, how we overcame different data and mindset challenges, and tips and tricks to remember when you pursue the same kind of work.

Is Testing Testing Your Resources?

Description: Testing is a critical function in your agency, and it can start to feel like a full-time effort with constant upgrades, service packs, and SQRs. Are you using more and more resources to keep up? Hear how other agencies have addressed this challenge and made dramatic improvements.

FTI Data: Leveraging GenTax to Improve Customer Experience While Maintaining a Secure Environment

Description: In this panel session, we will discuss how two agencies used GenTax to optimize the use of Federal Tax Information (FTI) while maintaining the IRS's strict security requirements.

RACC Evening Event Details

Missouri Botanical Gardens
Thursday, August 6, 2026
6:00 PM – 10:00 PM

You're warmly invited to the Missouri Botanical Gardens for an enchanted event under the stars. Discover whimsical blooms, unforgettable art, and delicious bites as you soak in the magic with fantastic company.