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Illinois Department of Revenue Improves Taxpayer Service with Napersoft

Background:
Illinois Department of Revenue is the tax collection agency of Illinois state and local governments.

Goal:
To provide better service to Illinois taxpayers while simultaneously cutting costs.

Solution:
Implement Napersoft customer correspondence software for all document creation, distribution, and archival.

Results:
Clear, attractive and accurate correspondence to tax payers while saving paper, filing space, costs and time.

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"The real beauty of this system is that the only operator intervention is the assignment of error codes. No one writes or proofreads individual documents. But taxpayers receive clear, attractive correspondence that's 100% accurate."

-Illinois Department of Revenue's Bureau of Information Processing

About Illinois Department of Revenue

The primary responsibility of the Illinois Department of Revenue is to serve as the tax collection agency for state government and for local governments. The department also administers the state's lottery and regulates the manufacture, distribution, and sale of alcoholic beverages. The department oversees local property tax assessments, and functions as the funding agent for the Illinois Housing Development Authority.

Mail from the tax collector is arguably among the least welcome of all correspondence. But the Illinois Department of Revenue has found a way to ease the confusion of Illinois taxpayers, while simultaneously cutting costs.

Exceptions Drive The Process

The need for correspondence to a taxpayer arises when some kind of error occurs in a tax return. Correct returns can be processed routinely. But those with wrong numbers, incorrect calculations, or critical omissions get flagged as exceptions; and a detailed tax assessment must be prepared and mailed. To handle the exceptions more efficiently, the Bureau of Information Processing developed the Exceptions Processing System (EPS).

Desired Improvements Dictate Tough Requirements

Napersoft customer correspondence software became a seamlessly integrated component of EPS. The new system had to produce thousands of documents automatically with (1) personalized information from a mainframe database, (2) flexible formatting control, and (3) subsequent on-line viewing by 1,500 users—employees who need this information to do their jobs.

Advantages of Customer Communications Management

Saving paper, filing space, and time. With all of the required legal wording, most assessment documents are at least two pages long. Since a copy of every document has to be saved indefinitely, the physical filing needs are immense. Storing documents electronically for on-line retrieval eliminates both the bulky hard copies and the effort consumed in filing and searching.

Batch operations save resources and postage. The merging of data with shells for printing occurs twice weekly in large batches. The runs are made at night, utilizing the computer to its fullest extent when all files are shut down. This saves resources during the day when all the operators are working on line.

The morning after printing, new assessments become available to the appropriate users. When a taxpayer calls, they can bring the assessment up on their screen and see the exact document the taxpayer is looking at and answer most questions immediately.

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Napersoft and EPS

Data entry clerks enter the data from incoming returns. Then data entry programs check rates, calculations and other factors. If the programs find any type of exception, they flag the return and put it into a hold file. Then another unit determines exactly what is wrong with each return and assigns reason codes.

The rest is done automatically with the help of Napersoft. Based on the reason codes, EPS generates a line-by-line comparison of what the taxpayer said on the return and what the state says he should have said. This includes dollar amounts needed to refigure the tax, plus interest and penalties, as well as any adjustments to credit.

Napersoft also controls the use of upper and lower case, bold face, underlines, tabs, and other word processing functions in the printed document.

Users can view the documents, but they can't change anything. There is a strict legal requirement on wording. The system ensures that only correct wording goes to the taxpayers and only exact copies are retained in the system.

Results

Napersoft's correspondence solutions integrated seamlessly with the Bureau of Information Processing's exception processing system (EPS). The system handles the state's largest source of revenue, the retailer's occupational (sales) tax. The system now generates over 5,000 documents per week, mostly 2-pages in length.

Additionally, Napersoft enabled Illinois' Department of Revenue to generate a Statement of Account document that detailed all actions, payments, and credits on a taxpayers account. With this information, refund checks are not sent to taxpayers who owe the state money.