



## CASE STUDIES

Taxes are never one of life's pleasures. But in Lee County, FL, taxes had become a real source of frustration — not because taxes were being raised — but because the local system for processing tax payments worked too slowly. Today, transactions are handled more rapidly, and information is more readily available to local citizens because of OCR for Forms™, information capture software designed by Microsystems Technology in Tampa, FL.

### Taxes: A Growing Problem

Lee County Tax Collector Bill Fussell was increasingly aware that something had to be done about the county's tax situation. IT Director Clay Jones had kept him informed about the mounting backlog in imaging.

The situation was getting critical, with an estimated backlog of six months. *Scanning* the 15 different types of tax forms associated with real estate, boats, cars, trailers, mobile homes and so forth wasn't the problem. *Indexing* the information and making it easily available was the culprit. There was a massive accumulation of backlogged work, which had to be done entirely by hand — and if experienced indexers weren't at the keyboard, the work was filled with errors.

Because six months' worth of receipts hadn't been indexed, they also couldn't be referenced. Therefore, a staffer in accounting or customer support would be forced to find alternate — and slower — research methods when a customer requested even the most basic information about his or her tax history. Fussell knew the inaccessibility of data meant the Tax Collector's office wasn't living up to its mission of "providing service where service is needed." So Jones was given an assignment: Completely overhaul the imaging system.

Jones' IT contacts put him in touch with Robert Porter, president of R&S Integrated Products & Services, Inc. in Lakeland, FL. Porter explained how versatile, compatible and cost effective OCR for Forms was. Then he arranged for Jones to

visit local operations that used OCR for Forms to see the software in action.

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terms. It was obviously so great we didn't even bother to crunch the numbers," states Jones. And with financial opportunities like that opening up, the Lee County Tax Collector's office was able to make long-overdue hardware changes. First Jones took out the mainframe, opting to use PCs running on a Windows® NT platform. Next, he removed several slower scanners, replacing them with one high-speed Bell + Howell 8125 du-

plex scanner. Despite procedural changes in the office that have slimmed the paperwork from 15 receipts to one, Jones credits the upgrades in hardware and software for making imaging more consistent and for providing greater economies of scale.

The office always had an impressive accuracy rate, but with OCR for Forms the accuracy was boosted by 3% — to a whopping 98% — and the work gets done more quickly. Jones credits OCR for Forms' automatic verification for the improvements in both accuracy and speed. The software automatically verifies most of the data, flagging only a small percentage of questionable characters that have to be verified manually. Another benefit: OCR for Forms processes voids (or canceled transactions) as well as receipts; thus, there are no longer gaps in customers' documentation histories. And on any given day, a staff member can access the previous day's receipts.

While the customer service issues raised by the huge backlog were the primary reason the office went looking for new software, the imaging accessibility has been nothing less than serendipitous. When a customer needs assistance, any staff member (whether in the Tax Collector's main office in downtown Ft. Myers, or in any of

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the six branch offices) has the option of running an index search or, if necessary, a full text search to locate necessary information. Data searches that formerly involved time-consuming manual labor are now done electronically in seconds.

For example, if a customer questions whether taxes were paid in full, he or she only has to provide accounting with the number and date of the check. A quick search of the LaserFiche database with indexes created using OCR for Forms reveals the receipt number, payment amount and various other transaction details. This quick electronic response vastly improves customer service, both over the phone and in the office.

One of OCR for Forms' most avid enthusiasts at the Lee County Tax Collector's office is Heather Darlin. In her position as image technology coordinator, she headed the scanning and indexing — which required six dedicated staffers before the acquisition of OCR for Forms. Now she's the

only person responsible for imaging, and she no longer considers the job laborious.

"Scanning and indexing used to be a force to be reckoned with, but now they're a non-issue," she declares. "OCR for Forms has made life much easier." Darlin has been assigned other duties to fill the time formerly spent dealing with a 2,000-image deficit per day. She currently is learning some of the intricacies of working the Help desk.

The Lee County Tax Collector's office is exploring other ways to better serve the public with the help of OCR for Forms. One idea is to integrate information searches into its web site. Such a move would, for instance, allow customers to look up details on back taxes without having to call or visit the office at all.

Taxes will never be painless. But, in Lee County, at least, they're not as taxing as they used to be.



Microsystems Technology, Inc.  
401 East Jackson Street, Suite 1200  
Tampa, Florida 33602  
U.S.A.  
Tel 813.222.0414 Fax 813.222.0018

[www.mti-info.com](http://www.mti-info.com)

Microsystems Technology GmbH  
Baarerstrasse 10  
CH-6300 Zug  
Switzerland  
Tel 041 41 729 63 33 Fax 041 41 729 63 34