

## **PSIGEN PSI: Capture Mirrors Manual Workflow and Revolutionizes Document Processing for Tax Resources, Inc.**

Tax Resources, Inc. has been providing audit defense services for individuals and businesses since 1988. Experienced tax professionals defend taxpayers and handle all communication with the IRS or state. Many are former IRS employees and CPA's who are wise to the strategies used by tax examiners intended to stress and intimidate the average taxpayer. Tax Resources, Inc. provides comprehensive and professional representation at a nominal fee.

### **The Problem**

With 11,000 audit cases annually, each making up about 4 inches of paperwork, Tax Resources, Inc. is "a very highly document intensive enterprise. When each Audit Representation Case file is closed, it must be stored in a secure and readily accessible manner," said Mark Olander, Executive Vice President. Manual filing was time consuming and tedious, and storage space for archived documents was limited. "They do not make Public Storage facilities big enough to store even one year of closed case files, and even then offsite storage must be maintained. Documents needed to be retrieved even from closed case files with less than an eight hour turnaround," continued Olander. The overwhelming volume of paperwork led Tax Resources to a lower-end software for relief. Although this solution worked moderately, it was highly inefficient. Production was low, and "once the file is scanned, it is shredded so any errors made in the Document Retention Department cannot be resurrected, and the documents are lost forever," said Olander. There was also no ability to provide quality control, leaving the scan operator with the responsibility of proofing each document manually. The process of naming files was also manual, and with every one of the Company's 200 employees faced with this headache, it was nearly impossible to enforce standardization. "Prior to PSIGEN, we developed these workflow processes and did our best to make sure the processes were followed. However because the processes were manual in nature, the scanning production was never able to keep up with document creation," said Olander.

### **Solution Requirements**

Despite their initial efforts, Tax Resources, Inc. continued to be inundated with paperwork, and the need to find an alternate solution was undeniable. A program that could mirror their manual workflow process, render easy review of each image scanned, organize files for quick retrieval, and prevent document loss was key. "Our only real option was electronic storage," Olander concluded.

### **The PSIGEN Solution**

After reviewing other options, it was apparent that the flexibility and architecture of PSIGEN PSI: Capture would result in an easier, faster, and more efficient document processing. "The very first appealing quality of PSIGEN was how exactly it duplicated the manual workflow processes that we created. Plus with the options available on how the documents could be scanned, we were able to increase the scanning production from 20,000 per month to 100,000 per month within the first six months," noted Olander. Employee frustrations were alleviated as retrieving documents is now just a few clicks away, and storage and filing dilemmas are a problem of the past.



## Conclusion

Thanks to the streamlined workflow PSIGEN PSI:Capture provides, business operations became smoother and increased in speed. Employees are now able to spend their time on more constructive tasks than repetitive and manual scanning, quality assurance, and file naming. Production has dramatically increased and time is saved with the ability to search and retrieve documents in an organized, electronic archive.

## Solution Components in Summary

<b>Capture Software:</b>	5 PSIGEN PSI:Capture Enterprise Workstations
<b>Content Repository:</b>	OpenText Alchemy
<b>Scanners:</b>	5 Konica Minolta BizHub scanner/copiers, 1 Fujitsu scanner

## About PSIGEN Software, Inc.

PSIGEN is the innovative leader in advanced capture applications, and helps organizations convert content into managed digital assets. Our largest customers include service providers, business process out-sourcers, and major corporations. We have significant customer concentrations in financial services, health-care, manufacturing, retail, and energy. Our channel partners include document imaging value added resellers, major brand MFP dealers, Microsoft solution providers, and document management software vendors.

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