TECHNOLOGY
INNOVATION
<GOVERNMENT>

Automating
Forms and Document
Processing

Boosting Performance, Efficiency and Effectiveness

INSIDE

Case Study: Commonwealth of Pennsylvania/Department of Revenue

▶ Legacy text system migration, replacing the use of IBM/DCF
▶ Best practices of forms/data design and automation
▶ Timely response to legislative changes

Commonwealth of Pennsylvania Department of Revenue

With use of Papyrus, the Bureau of Information Systems has shown leadership within the Department of Revenue.

The mission of the Pennsylvania Department of Revenue is to administer the tax laws of the Commonwealth in a fair and equitable manner. The Department of Revenue also administers the State Lottery, which generates funds for programs that benefit Pennsylvanian senior citizens.

■ Facts and Figures

The Department has approximately 2000 employees and is responsible for collecting Personal Income Tax, Sales and Use Tax, all corporate taxes, Inheritance Tax, Realty Transfer Tax, Motor Fuel Taxes, and all other state taxes. In addition, the Department collects the Local Sales Tax for Allegheny and Philadelphia counties, the Public Transportation Assistance (PTA) Tax, and funds for the Pennsylvania Intergovernmental Cooperation Authority (PICA).

Exceeding their responsiveness to request-or goals/time frames for Forms Changes eliminating backlog of change requests.

The Department also administers the Property Tax/Rent Rebate program and the Public Utility Realty Tax reimbursement, prepares the tax expenditure portion of the Governor's Budget, licenses small games of chance, distributors and manufacturers.

■ The Situation

The Department of Revenue centrally manages several hundred electronic forms, each with countless revisions. Many changes are legislated, others are initiated by user Bureaus to maintain currency of information.

You have a quality product and we are very pleased with the usability and results we are seeing!" Ms. Hollace Kahley, Manager, Bureau of Information Systems, Business Systems Division

The Department of Revenue is committed to AFP for production documents. About 80% of the output is forms/data oriented and were originally generated using the old IBM PMF (Print Management Facility) and PPFA source coding. The other 20% are dynamic formatted documents that were generated by the IBM DCF (Document Composition Facility).

■ The Challenge

Antiquated tools had made creating and changing forms difficult and time consuming. There was no viewing and WYSIWYG design capability. Conditional processing was very limited. Data handling was very work intensive and Corporate Identity for forms could not be enforced.

■ Key Requirements

The key requirement was to be responsive to legislative changes impacting bureau notices - in particular for forms changes. Previously it took weeks, now they can consistently do this within a matter of days if not even hours.

■ Customer Focus

The customers are Pennsylvania corporations and taxpayers and also other state agencies. The use of Papyrus is key to enhancing Corporate Identity and deliverables to facilitate better communication resulting in more accurate fillings and collections.

MOTIVATIONS *for* INNOVATIONS	
Motivation:	Improve responsiveness for forms changes
Innovation:	Enhancing corporate identity and deliverables for better communications resulting in more accurate filings and collections
Solution:	Papyrus Document Solution for corporate forms and document applications

■ The Project

Within the Department of Revenue there are two Application Development entities:
Business Systems - deals with Corporations; Sales, Employer, etc...
Individual Systems - deals with taxation for individual taxpayers (income tax, inheritance, etc..) and a variety of miscellaneous taxes such as Motor Fuels, etc...

"With Papyrus we have been able to move processing into the 21st century from old legacy solutions of the 1980's". Robert Spayd, Application Developer Supervisor

Business Systems Division is involved in a major project to replace the legacy Corporation Tax systems with the Keystone Integrated Tax System-2. KITS2 is a multi-tier, object-oriented, in-house solution, written with 5 GL tools. DCF was the document composition tool integrated in the original KITS. Papyrus DocEXEC is the document composition solution for KITS2. Upgrading the composition capabilities was a primary stimulus for acquiring Papyrus.

■ Delivering an enterprise-wide document development tool

Choosing Papyrus as the enterprise document system enabled the Department to discontinue new development with IBM PMF, source coding of PPFA and in the future IBM DCF. The document developers appreciate the Papyrus WYSIWYG Design capabilities, accuracy of design and final print results, the use of shared access to common resource libraries and the flexible data handling. All of it resulting in substantial time savings.

They were soon able to eliminate the backlog of change requests and clean up document formats to meet more stringent USPS service regulations. The capability to quickly enhance existing AFP resources was a crucial requirement when choosing the Papyrus suite of products. A common standard for logos across documents was easily enforced and a consistent look and feel to documents was ensured. They moved from typical fixed pitch legacy documents to typographical fonts, which studies show are 60% more readable.

"The ISIS tools are excellent. I have been able to take developers with no formal AFP training and get them productive with the AFP architecture in a relatively short period of time." Bill Alward, AFP Reengineering Project Manager

Hundreds of Notice applications have been developed or updated since starting use of Papyrus in September 2003. Over 1.25 million pages are generated per month. The printing of all documents is done centrally on the mainframe to InfoPrint 2000's using PSF.

With the use of Papyrus, BIS has been able to meet/exceed their responsiveness to requestor goals/time frames and also do work for a number of other agencies.
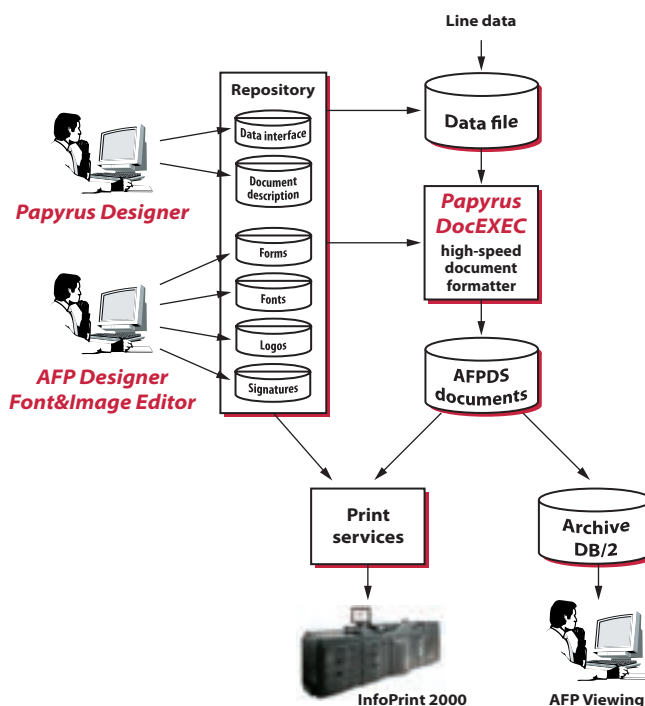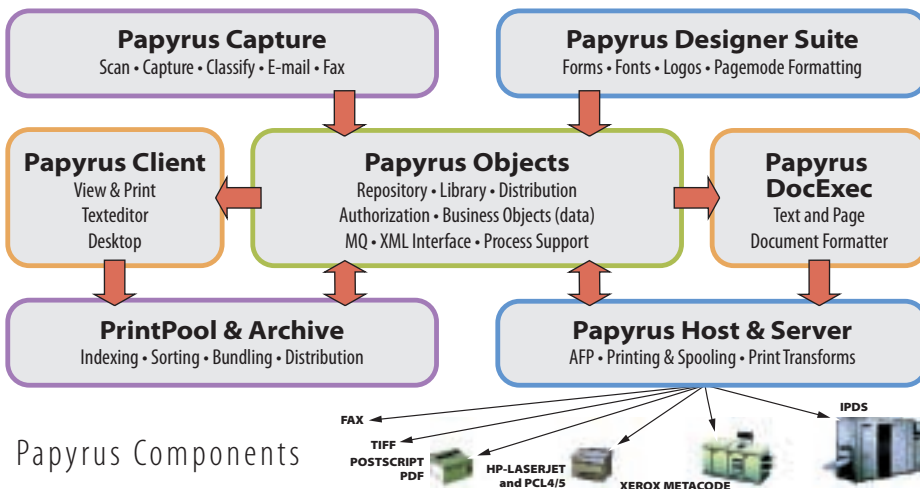
Business Systems Document Workflow

A **comprehensive and scalable solution** for centralised management of document applications, print and output operations that span web, client server and host environments.
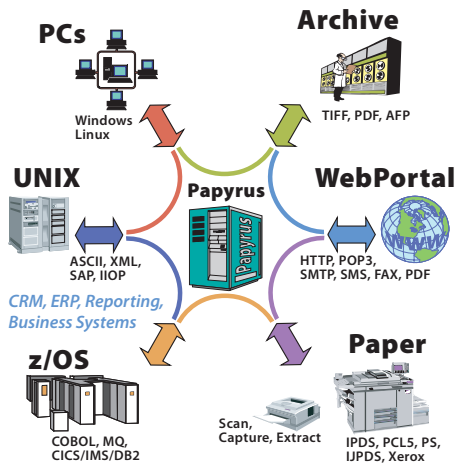
Papyrus Document Frameworks

- Automated Document Factory
- Enterprise Application Integration
- Enterprise Output Management
- Enterprise Content Management
- Business Process Management
- Portal and Web Applications
- Change Management
- Correspondence
- Campaign Management
- Print Management
- Capture/Classify/Extract
- E-mail, Fax

Organizations can **define, measure, and manage** output management across complex heterogeneous environments from centralised control points.

Papyrus Components

Public Sector uses Papyrus

Austrian National Library **Austria** • Centre Informatique de L'Etat **Luxembourg** • Chamber of Commerce **Austria** • City of Vienna **Austria** • Clackamas ESD **USA** • Commonwealth of Pennsylvania Department of Revenue **USA** • Comune di Milano **Italy** • BIT/VBS **Switzerland** • Dept. of Transportation Salem, Oregon **USA** • EDS (Department of Social Security) **UK** • EDS (OneCCV Job Seeker) **UK** • European Patent Office Riyswijk **Netherlands** • Finanzdirektion Zuerich **Switzerland** • INCM (Imprensa Nacional Casa da Moeda) **Portugal** • INSS (Instituto Nacional de la Seguridad Sodial) **Spain** • Land Transportation Authority **Singapore** • Landeshauptstadt Duesseldorf **Germany** • Landwirtschaftsverband Hannover **Germany** • Ministere des finances **France** • Ministry of Education Singapore **Singapore** • OSZE, general vote in Bosnia-Herzogovina **Bosnia-Herzogovina** • San Diego City Schools **USA** • State Governments of Georgia, Idaho, Nebraska, S. Dakota **USA** • State of California: DMV, Calpers **USA** • State of Wyoming **USA** • Texas Department of Public Safety **USA**