

turning paper into power

A Customer Success Story from Scan-Optics

When Tax Returns Are All Wrong, a Software Solution Saves the Day

The Situation Scan-Optics processes tax forms for many state departments of revenue. Early in the 2008 tax season it was determined that one long-time revenue department client had inadvertently sent the wrong template for data entry of some of the forms. The template Scan-Optics' software engineering team received was a reduced scale version of the template given to more than 20 vendors who produce tax form software. Furthermore, print vendors used it to produce widely varying sizes of the forms. The problem surfaced when taxpayers printed their tax forms from any of these vendors and filed them with the State. When the forms arrived at Scan-Optics' Document Processing Center, the fields on the forms did not match the reduced size template that Scan-Optics intended to use to process the forms. In fact, the printed forms varied so much in size that literally no one size template would fit all. The problem was complicated by the fact that certain confidential taxpayer data, which must be transmitted to another site for keying, could not be extracted because the forms did not align correctly with any template. Since hundreds of thousands of these unreadable forms were already in the hands of taxpayers, there was no turning back.

The Scan-Optics Solution As the backlog of unprocessed tax forms grew, Scan-Optics' software development team worked quickly to analyze the problem and write software that would transform the scanned images to the size needed to work with the original template. The solution, named Advanced Image Registration Capability, uses Scan-Optics' proprietary AccuScore technology to detect primary and secondary target marks on the tax forms. It lines up these fields and sizes them so that data can be extracted correctly.

The Sequel Scan-Optics worked with the revenue department's technical team to establish standards and recommendations for the redesign of future forms, to make them more tolerant of variations in the printing process and ultimately more scannable. The Advanced Image Registration Capability that was developed to solve this crisis has been extended to different tax forms and other state forms to obtain both cost savings and more accurate results.

