



## Tax Return Processing Automation The SBS Approach with Docunym Tax™

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It's tax season again and the glut of paper and electronic tax filings are about to deluge your revenue office staff. Business as usual dictates that you call your local staffing company and bring on temporary personnel that you have to house, equip, and train, not to mention the additional human drama. Then there is the tension building up in your staff, knowing that long hours and errors will result because of manual processes and inadequate management tools. In addition, Treasury is asking you to do more with less, so how are you supposed to do that?

Whether you currently have an imaging solution or service or not, do you have a process automation tool? A powerful workflow application that can help to improve efficiency and assist management decisions while reducing human error? If none of these situations sound familiar, then congratulations, you're one of the fortunate few. But for most tax departments we can show you an easier way, a more efficient and cost effective process to tame the returns processing tsunami that spills into the department on a regular basis.

### **Off the Shelf & Customizable**

Specialized Business Software (SBS) has created a dynamic process improvement document imaging/workflow application after our experience in developing a custom tax processing solution for a major metropolitan city. Utilizing superior technology only gets you so far if your new application forces you to adapt to it rather than the software adapting to your processes. Docunym provides the flexibility to conform and improve your processes.

### **Implementation Options**

Regardless of your department's situation with technological support, there is a Docunym™ implementation for you. For those with ready access to qualified technological staff and resources, we offer an on premise implementation whereby you would host the application. For others without the necessary resources or who would rather not host the application, we also offer the ability for the application to be hosted off-site in a secure cloud environment. This implementation allows for immediate startup as well as less overhead.

### **Safe & Secure**

Whichever implementation of Docunym Tax™ you choose; you can rest assured that you have a safe and secure application. Multiple password options, dynamic role based security, audit trails and end to end encryption are just some of the rights and security benefits available to your department with the Docunym Tax™ system.

### **Acquisition & Indexing**

Docunym Tax™ supports decentralized or centralized scanning, including individual, small, and large batch capabilities, and can capture documents sent as an e-mail attachment. In addition, uploading multiple files and file types are a breeze with Docunym™. With multiple acquisition options available, you can choose when and how to index your documents to create the most efficient process. Documents or files can be indexed at the time of acquisition or anytime after you bring them into the system. The system also provides user defined drop down tables and OCR lasso for data entry integrity and speed. Document images are easy to access and maintain with Docunym™'s image manipulation.



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### **Familiar & Friendly**

Learning to use and navigate the application is a breeze with Docunym™'s Windows type look and feel. Once in the system, Docunym™ features a familiar Windows Explorer style document organization, and tabbed interfaces enables multiple document viewing for multitasking within the system.

### **Workflow**

Once in Docunym™, on the fly criteria based concurrent workflow features allow for automating the data entry, work up, audit, and review of your tax payers' returns. Docunym™'s dynamic table-driven business rule workflow engine allows for a smooth ride with its criteria-based automatic routing and e-mail notification of workflow actions/events.

### **Search & Retrieve**

Searching and retrieving for just what you need has never been easier. Docunym™ provides an easy to use Google type search enabled by the full-text OCR as well as all index fields. A more powerful advanced search of documents in the system is also available allowing users to refine their search to certain index fields and values. Saving of searches is also available to allow for quick access to frequently used queries.

### **Collaborate & Manage**

Collaboration is enhanced by Docunym™, as returns can be viewed and worked on by multiple personnel at a time. Documents are also easily distributed via email, printed, or saved within the system. Managers will soar above the swells, having a birds' eye view by user or process and can make adjustments with real-time personnel workload management views.

### **Integration**

Integrating Docunym™ with your existing systems is as close as a double click away. Docunym™ features our "Easy Integration" tool allowing users to tie-in to existing applications without the need for professional services. In addition, full integration with MS Office allows for access of files within and saving of files to Docunym™ without ever leaving the office suite. All files loaded to the system are stored in their native formats preventing compatibility issues with their use later on.

### **A Complete Solution**

Docunym™ is only part of the solution that SBS can offer. Because SBS is an applications development firm as well as a document management company we can develop custom or hybrid solutions to meet your specific needs. Backfile conversion of existing paper files, electronic tax files import, Check21 Remittance processing, and document scanning equipment and consulting round out the complementary solutions SBS can provide. So no matter what your tax processing needs, SBS has the right solution for you.