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Qualitative and real time consulting

Tax declarations - simple and satisfying

With ELO^{professional}, the Basel-City Tax Administration (Steuerverwaltung Basel-Stadt) has implemented electronic tax records. This has optimised throughput times and significantly reduced the time spent on managing tax records. In addition to increased worker productivity, taxpayers will primarily also benefit from an improved quality of service.

The aim of the tax office in the Basel-City Canton in Switzerland is to make tax declarations as simple as possible. The Tax Administration, which is responsible for collecting cantonal taxes and the direct federal tax, decided to fundamentally improve its service and organisation with a document management system (DMS). The aim is to automate the collection of income and personal tax from natural persons. The primary result should be to increase customer satisfaction through qualitative and real time consulting according to the motto "Tax declarations made easy".

„Faster access to tax records in particular has led to a noticeable increase in customer satisfaction, and can be traced back to rapid information provision using electronic tax records.“

Mr Binggeli, Project Manager
at Basel-City Tax Administration

Solution

an additional benefit



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Highly functional and user-friendly

Overview

Country: Switzerland
Industry: Public administration

Company

The Tax Administration for the Basel-City Canton is responsible for collecting cantonal taxes and the direct federal tax. The Tax Administration employees 226 people. This canton, with the third largest city in Switzerland, has 188,000 inhabitants.

Challenge

Every year 140,000 tax declarations are processed, which equates to 7 million pages a year. The administrative workload and associated costs were enormous. Searching in the tax records was therefore very time-consuming.

Solution

ELOprofessional as the document management system forms the basis for electronic tax records. Forms are scanned in, the values recorded and further processed automatically with **ELO**. **ELO** retrieves the data recorded via the interface to CaptureTax and imports this into the **ELO** archive. The data can now be simply and quickly processed in **ELO** by employees.

Benefits

File storage is now more reliable and more convenient with **ELO**. Throughput times have been optimised. Productivity has been dramatically increased. When making enquiries on the phone, taxpayers receive real time and improved service quality. Time and effort for storing and managing tax files could also be significantly reduced.

Cost savings through fully automated processing

Before introducing the DMS, the tax records passed through a conventional procedure, predominantly on paper. After filing, they began their traditionally long route through the individual specialist departments. Here the values were typed up on a typewriter and analysed, the records registered, transported to and fro, divided up and grouped together again in order to finally be archived in huge filing stores. Searching in the old tax records was thus very time-consuming, the costs of storage and labour very high and efficiency correspondingly low. Employees had little time left for the important core tasks. Back in 2004, the Tax Administration has already made the first step towards "Tax declarations made easy" with new transparent and easy to understand forms. The next logical step was the introduction of **ELOprofessional** as a DMS solution. This optimised throughput times and formed the basis for being able to provide taxpayers with better information more quickly. Time and effort for storing tax records could also be significantly reduced.

Why ELO?

"To simplify the working life of customers and above all employees, the user-friendliness of the new DMS was a basic requirement for the Tax Administration", says the project manager at the tax office Mr Binggeli, "the easy-to-use interface is one of the excellent strengths of **ELOprofessional**." With the range of functions provided in the standard version, the Stuttgart-based solution was able to stand up to the competition.



Future requirements in particular, e.g. workflow management, are now offered as standard in **ELO** and do not need to be individually programmed for the Tax Administration.

Efficient, cost-effective and consistent management

With **ELOprofessional**, the tax declarations for the Basel-City Canton are taking a new direction. Using the CaptureTax scanning software, the forms are scanned, the values recorded and automatically further processed with **ELO**. **ELO** retrieves the data recorded via the interface to CaptureTax and imports this into the **ELO** archive. The data can now be simply and quickly processed in **ELO** by employees as electronic tax records.

The interface to the Nest tax administration software enables direct access to the archived data in **ELO** via a button in the Nest assessment dialogue. The tax case displayed in NEST forms the basis for the search in **ELO**. The corresponding search criteria are copied over automatically. The output from NEST is prepared for printing and packaging via OMRMarker. The PDF files created in this way are saved in the **ELO** archive so that employees in Tax Administration can access the invoice, reminders, etc. sent at any time.

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Mr Binggeli, Project Manager
at Basel-City Tax Administration



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Reliable and convenient file storage

„File storage is now more reliable and more convenient with ELO. Worker productivity has been dramatically increased. As a result of the tax records being immediately available electronically, the information content and the time taken to provide it during telephone enquiries from taxpayers have been significantly improved.“

Mr Binggeli, Project Manager
at Basel-Stadt Tax Administration

Tax declarations made easy

From paper to electronic records – for Tax Administration employees, this was indeed a huge adjustment, but the user-friendliness of ELO and the faster provision of information meant that it was quickly accepted by all. Mr Binggeli summarises: “File storage is now more reliable and more convenient with ELO. Worker productivity has been dramatically increased. As the tax records are available electronically immediately, the information content and the time taken to provide it during telephone enquiries from taxpayers have been significantly improved.” This results in an optimised service quality and efficiency. All according to the slogan: Tax declarations made easy.