Florida's Orange County Tax Collector Reduces Costs and Simplifies Payment Processing Thanks to OPEX and Informa Software

Tax collection season is the busiest time of year for any municipal tax collection department. Tens of thousands of envelopes that contain checks and payment coupons arrive each week, all of which need to be processed in a timely manner. Traditionally, processing this high volume of payments has required many hands to open, review and process each payment. This labor-intensive task is extremely time-consuming and often requires the addition of temporary employees to complete the job. To put it in perspective, the Orange County (FL) Tax Collector (OCTC) hires up to 40 temporary workers during November and December to help manage their entire process.

An Avalanche of Envelopes

Prior to 2000, OCTC used a completely manual system to process their local tax payments. Workers would begin by sorting the inbound mail and then opening the stacks of envelopes to remove the contents. Next, the staff would compare the dollar amount on the coupon to the amount on the check and then place the contents into one of four piles: over-payment, under-payment, multiple payments or exact matches. Then the check and the coupon would be scanned by the imaging department in order to enter the information into the system. Finally, all the payments would undergo a tabulation process to ensure that the total amount of payments matched. While the system worked, it was a lengthy process that was costly and required quite of bit of staff support.

Thinking that the process could be improved, Joe Giovanelli, Application Support Manager at OCTC, went in search of a technology partner that could provide a better solution. "I spoke with a number of technology vendors and came to the conclusion that we needed a hardware solution that could automatically open each envelope, capture an image of the envelope's contents, and then sort the contents. We also needed a software solution that could extract important data from the image of the envelopes' contents." Giovanelli met with representatives from OPEX and immediately saw how the entire process could be improved.

OPEX and Informa Software Delivered

OCTC selected the OPEX AS3690™ integrated with a Model 51 Rapid Extraction Desk™ and combined it with Informa Software's A2iA software to streamline the entire payment processing activity. As envelopes arrived at the OCTC facility they were automatically opened by the OPEX AS3690i and the check and payment stubs were removed. The contents were scanned and Informa Software's A2iA software captured and routed the images and data throughout the system. If the amount on the check matched the payment coupon, the payment was processed. If the amount on the check was different than the amount listed on the coupon, it would be reviewed by an operator and corrected.

Prior to implementing the technology from OPEX and Informa Software, the physical checks would be transported to the local bank for deposit which could often take two to three days to process.

But with the implementation of Informa's software, OCTC simply sent the image file to the bank and the funds were deposited electronically by the end of each day.

According to Giovanelli, "Using OPEX and Informa Software's technology has dramatically improved how we process tax payments. With the image processing and cash letter system we have in place with our bank, we haven't had a single bank correction in eight years. This has saved us and our finance department a tremendous amount of time. In terms of getting the money deposited in the bank, we've cut that process down from three days to one day."

In addition, reducing the number of temp workers has saved OCTC quite a bit of money. "The cost savings from not hiring as many temps was well worth the investment. Previously we hired 30 temps for six weeks and an additional 10 temps for eight weeks to get us through our busiest months. Once we implemented the two OPEX AS3690's to open and sort the mail, we only needed to hire two temps. Those two temps made sure that the amounts on the checks matched the amounts on the payment stubs. The combined technology from OPEX and Informa Software had a positive impact on our bottom line."

OPEX and Informa Delivered, Again.

In 2012, OPEX and Informa Software began working with Giovanelli on a technology upgrade which included an operating system refresh. In addition, "the OPEX systems we originally installed had outlived the lifespan for such technology. Due primarily to OPEX's great service, these units were still running great but we realized that advances in the technology had come along and we needed to upgrade," said Giovanelli.

Along with offering many new features, OPEX's new universal document imaging and payment processing units were designed to run on OCTC's updated operating system which helped simplify OCTC's payment processing system. "By the summer of 2014, we had fully implemented the updated Informa Software platform and our new OPEX FalconRED™ units and saw immediate benefits."

The new user interface greatly simplifies how payments are processed. When the envelope is opened the payment stub's barcode is scanned and the payee's identification information and payment are processed immediately. Previously, the data would have to be entered by hand.

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"Words cannot describe how much time and effort has been saved by using OPEX and Informa Software's technology," said Giovanelli. "In the past, we could not process all of November's incoming mail until the middle of December. Now, with the new technology we're using, we're caught up at the end of each week."

To put the volume in perspective, in November 2014 the OCTC processed over 81,600 transactions. By using the technology from OPEX and Informa Software, the OCTC has reduced its operating costs and made its operation run more efficiently.

As Giovanelli put it, "All of the technology from OPEX and Informa Software has integrated seamlessly. We've developed new internal processes and even new dashboards to monitor our efforts. I can't say enough good things about how both companies came together to develop a solution that fit our needs and reduced our costs."

About OPEX Corporation

OPEX Corporation at its core is all about optimizing business processes. As a recognized global technology leader in document imaging and high-speed mailroom automation since 1973, OPEX systems have provided performance enhancing workflow solutions and cost-effective results to thousands of organizations worldwide. Today, OPEX systems are installed in financial services, healthcare, government, non-profit, utility, service bureau, insurance, telecommunications and university/educational marketplaces around the world. For more information, visit www.opex.com

About Informa Software

Since 2001 Informa Software has provided business productivity solutions including content management, document imaging, data capture and business process automation. Informa focuses on three main business solution offerings — software product development, partner solution integration (DocuSign, Microsoft, HP, OpenText), and systems application consulting. We offer the tools, personnel, and business expertise to allow companies to reduce operating costs, manage risk, and maximize productivity. Our subject matter expertise as well as our business process design experience allows us to help our customers quickly get to the root of their problems and implement timely and cost effective solutions. As a premier technology solution partner, Informa provides a single source for technology products, services, integration, configuration, deployment, installation and infrastructure support. For more information, visit www.informasoftware.com

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