

**CASE STUDY
STATES OF GUERNSEY INCOME TAX**

“We have achieved a real business change by implementing this EDRM system. Our strong relationship with Fujitsu, which has supported us through the whole of the solution development, has made this change as smooth as possible. The Fujitsu approach of sharing ideas has helped us develop the processes and skills to deliver a first class service to our customers.”

Andrea Dyer, Tania Sargent and Peter Webb
Guernsey Income Tax



Customer’s Challenge

States of Guernsey Income Tax handles 85,000 live tax files containing three million documents, which require storage and manual filing and routing around the five storey Guernsey Income Tax building. There are an additional three million documents which are ‘old’ or ‘deleted’ but still require storage.

Guernsey Income Tax was facing several key issues, primarily centred around its processes being paper-based:

- The manual system of passing files around the building made it difficult to track progress and respond to any customer queries quickly. In addition, the paper based system lacked a clear audit trail and it could be hard to find files.
- With all documents being filed in a central location the risk of loss in the event of a fire, flood or similar disaster was very high. Loss of the paper files would result in business being held up and it would be very difficult to replace the lost information.
- The available onsite storage for the live paper files was reaching capacity and off site storage was being used increasingly for deleted files.

Guernsey Income Tax generates 80% of the States’ income through the assessment and collection of income tax so a much improved solution was critical to its successful service delivery.

Guernsey Income Tax realised that it should embrace new technology and replace the paper based storage system and so began to look seriously at the merits of electronic document management. An internal group was formed to consider IT systems strategy and examine the market to increase their knowledge. They appointed consultants and started the procurement process.

Fujitsu Solution

Fujitsu proposed a fully integrated, electronic document and record management (EDRM) solution. In addition, Fujitsu proposed a workflow solution that enables Guernsey Income Tax to track and automate the processing of tax returns and correspondence. This solution combines Meridio EDRM software, Metastorm eWork BPM software and Kofax Ascent scanning software.

SUMMARY OF KEY FACTS

Organisation:
States of Guernsey Income Tax

Service/s Delivered:
Case handling and tracking system composed of fully integrated EDRM, workflow system and front end scanning.
Fujitsu HostTalk integration to the Guernsey Income Tax mainframe (ITAX) and support agreement.

- Benefits:**
- Greatly reduced requirement for storage and administration of paper files, and associated costs.
 - Access to documentation is immediate saving time and improving efficiency.
 - Improved customer service in terms of query handling and availability of information.
 - Full disaster recovery back up available on all electronic items.
 - Audit trail available for all work handled through the system.

CASE STUDY

STATES OF GUERNSEY INCOME TAX

This solution enables all tax returns to be scanned on arrival at Guernsey Income Tax and to be managed electronically thereafter. All incoming correspondence is also scanned and attached to the relevant file. The tax assessors use a 'viewer' to write on, highlight, tick and mark the tax returns in exactly the same manner as they previously did with the paper returns. In addition, workflow routes the tax returns around the assessors according to predefined business rules. Similarly, workflow routes correspondence to the appropriate people.

Benefits to our customer

The benefits of the solution to Guernsey Income Tax are already being realised during the transition from the old paper system to the new electronic system.

The physical movement of paper files from one desk to another will no longer be necessary as staff gain access to documents electronically from their own desktop computer. Key data is retrieved directly from the (ITAX) legacy system, eliminating the need for tax assessors to access ITAX repeatedly to look up information.

All documents are fully secured and back ups are made accordingly to ensure that in the event of a fire, or other disaster resulting in paperwork damage, work can resume almost immediately and minimal information is lost.

Guernsey Income Tax no longer faces the challenges of storage as all new documentation is scanned and held electronically, and the quantity of old paper files will reduce as it moves the old documents from live to archive status and eventually destroys them. The EDRM system has enabled Guernsey Income Tax to define a file retention policy that meets its actual needs for data retention, and ensures compliance.

Customers can now expect a greatly improved service when they contact Guernsey Income Tax. Their letters are scanned and attached to the relevant tax file through electronic workflow, enabling a faster response. Likewise, previously for telephone queries, an officer would have had to gather the relevant files and then return the call; now they can be responded to immediately. As a result outgoing telephone charges will be greatly reduced.

The automation of routing and electronic storage will result in the reduction of the clerical team required to file, manage and update the information of the paper files. These staff can be redeployed in alternative areas of Guernsey Income Tax or the wider civil service and their skills can be better developed.

Andrea Dyer, Central Services Manager,

"The volume of filing has always been a big headache. The need to keep paper files up to date has meant some staff being required to carry out very mundane duties"

The solution has also provided the basis for Guernsey Income Tax to consider developing a web application so that tax returns can be completed online. It is anticipated that an initial take-up, which may be as high as 50%, will generate additional cost saving benefits. For example, Guernsey Income Tax receives the vast majority of taxpayers' tax returns during the first three months of the tax year - just opening the post takes 12 man-hours each day.

Peter Webb, IT Manager,

"Only the fact that we have the successful edrm system in place allows us to contemplate embarking on the web application project."

Our Approach

Fujitsu favours the partnership approach when working with all its customers and with Guernsey Income Tax this was mutual, and extremely effective. As Fujitsu worked onsite at Guernsey Income Tax, the development of the system was visible to staff. This approach, along with Fujitsu's ability to understand the customer's processes and requirements, and a gradual handover, greatly enhanced the understanding and acceptability of the changes to come.

Tania Sargent, Personnel & Development Officer,

"One of the biggest challenges we faced was convincing the staff of the ultimate benefits of the system. As they are given access to additional functions, the more they see of it the more they like it."

Our Expertise

Fujitsu is one of the leading organisations providing IT services in the Document, Content, Records and Knowledge Management and the Business Process Management arena, with in excess of 15 years experience and some 100 specialists to hand.

Longstanding relationships with key suppliers, such as Meridio and Metastorm, and the ability to understand customer processes and requirements mean that Fujitsu can offer best of breed solutions specific to the customer's business.

Similar solutions to that of Guernsey Income Tax have been implemented at Weymouth and Portland Borough Council, Highland Council and the Home Office, providing Fujitsu with an excellent background in understanding how the software meets business needs and working with government organisations.

ASK FUJITSU...

Contact us on +44 (0) 870 242 7998 or
askfujitsu@uk.fujitsu.com or visit uk.fujitsu.com