

TASC Uses High Performance Smart Document Capture Technology

Total Administrative Services Corporation ([TASC](#)) has provided superior administrative services for more than 40 years to customers throughout the United States. These services include tax savings for farmers and small business owners; employee benefits administration; compliance services; and human resources activities. TASC offers more than 20 innovative service offerings and has revenues exceeding \$100 million. Their team of dedicated professionals is made up of 7,600 field representatives and more than 900 associates in the Madison, Wisconsin campus and remote locations.

Challenges

One of TASC's largest customers is the United States Office of Personnel Management (OPM) Combined Federal Campaign ([CFC](#)), which supports the charitable giving initiatives for the Federal Government and for all federal employees worldwide. The CFC is dedicated to promoting and supporting philanthropy through a program that is employee focused, cost-efficient and effective in providing all federal employees the opportunity to improve the quality of life for all. It is also the world's largest and most successful annual workplace charity campaign, with almost 200 CFC campaigns throughout the country and overseas raising millions of dollars each year. All applications, forms, tax and financial paperwork from approximately 25,000 charities were being manually entered, which was extremely time consuming and expensive. TASC began its search for an automated, advanced document capture (including OCR) system to streamline the high paper volume.



Customer

Total Administrative Services Corporation

Industry

Public Sector and BPO

Application

Tax Documents & Forms

Results

- Saved countless manual data entry hours and expenses
- Initially processed 1.5 million pages in 10 weeks
- Additional 1 million pages of audit forms for about 25,000 total files
- Efficient, streamlined process
- High performance levels monitored by Advanced Reporting module



Solution

TASC knew eliminating tedious manual processes and automating data entry would help transform OPM CFC. Tom Flitter, Director of Information Technology & Integration at TASC, and his team began researching different vendors, ultimately deciding on Ephesoft. “What set Ephesoft apart from other vendors was its service level agreement, cost and unlimited number of pages we could process. Also, Ephesoft had impressive customers in the government sector and experience with FedRAMP,” explained Amanda Barott, Manager of Applications & Integration at TASC, who spearheaded the search. “Ephesoft had a depth of experience with integrations to other systems and the possibility to expand internally when the time comes,” added Flitter.

In December 2016, TASC implemented Ephesoft Transact as the advanced data capture technology platform. Flitter and his team determined there were seven tax document types and forms that OPM needed for processing. About one-third of the documents captured ranged from 10 to 50 pages each. These categories would serve as the different types of classification so OPM could easily find and use the data after it was captured.

As part of the solution, Ephesoft’s Professional Services team was brought in to set up the user interface and configuration of the seven document types. The system, with its patented machine learning algorithms, needed only a few samples of each form in order to learn the type of information to be extracted. TASC and OPM required Ephesoft Transact to be able to process approximately 1.5 million pages within a 10-week period. Additionally, the system had to process at least one million pages of audit report financial forms, based on an average of 30 pages per file

over an estimated 25,000 total files. For any financial audit documents, Ephesoft Transact read nine words or phrases while 22 index fields were extracted. For other documents, 16 index fields were extracted.

A web application was used to upload the documents and images into Ephesoft Transact. The platform classified each document based on its type and extracted the correct metadata to populate the required index fields. TASC ran the software in batch mode only, so the data captured was exported. Any data not exported could be reviewed and validated at the next stage. Ephesoft Transact exported the metadata into OPM’s database along with all associated PDFs for future access. Standard reporting and advanced reporting modules were also installed for monitoring and improving the data flow and performance levels.

After the system learned and classified the document types, it would alert the user to review and validate any questionable instances that did not meet the tolerance thresholds. TASC and OPM set an 80% confidence level on the form types without going for verification or manual intervention. If any of these documents were not able to be verified with at least 80% confidence, they went into a manual review process. Once all documents were validated, the metadata was exported back into their database. This process made all unstructured data actionable for OPM to use.

Darlene Bernarde, Business Analyst at TASC, monitors Ephesoft’s platform for OPM. She explained, “Our peak season for processing is December through February. The performance levels are good and the system is easy to use. We use a load balanced approach that runs on a 24-hour clock to maximize volume.”





Next Steps

Ephesoft's platform has helped many government organizations, from top intelligence entities to cities, municipalities and courts, use advanced document capture to better manage their data and make it actionable. TASC's customer OPM works hard to make the federal government America's model employer. We look forward to helping expand TASC's advanced document capture platform to provide continued efficiency and accuracy for OPM.

“Understanding and servicing our clients is what we do. OPM had millions of pages of documents that were manually being processed. They needed a sophisticated, but easy solution that could capture, classify, validate and export data into their system automatically – and Ephesoft was clearly the best fit. Ephesoft's platform has saved countless manual labor hours.”

— **Tom Flitter, Director of Information Technology & Integration at TASC**



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