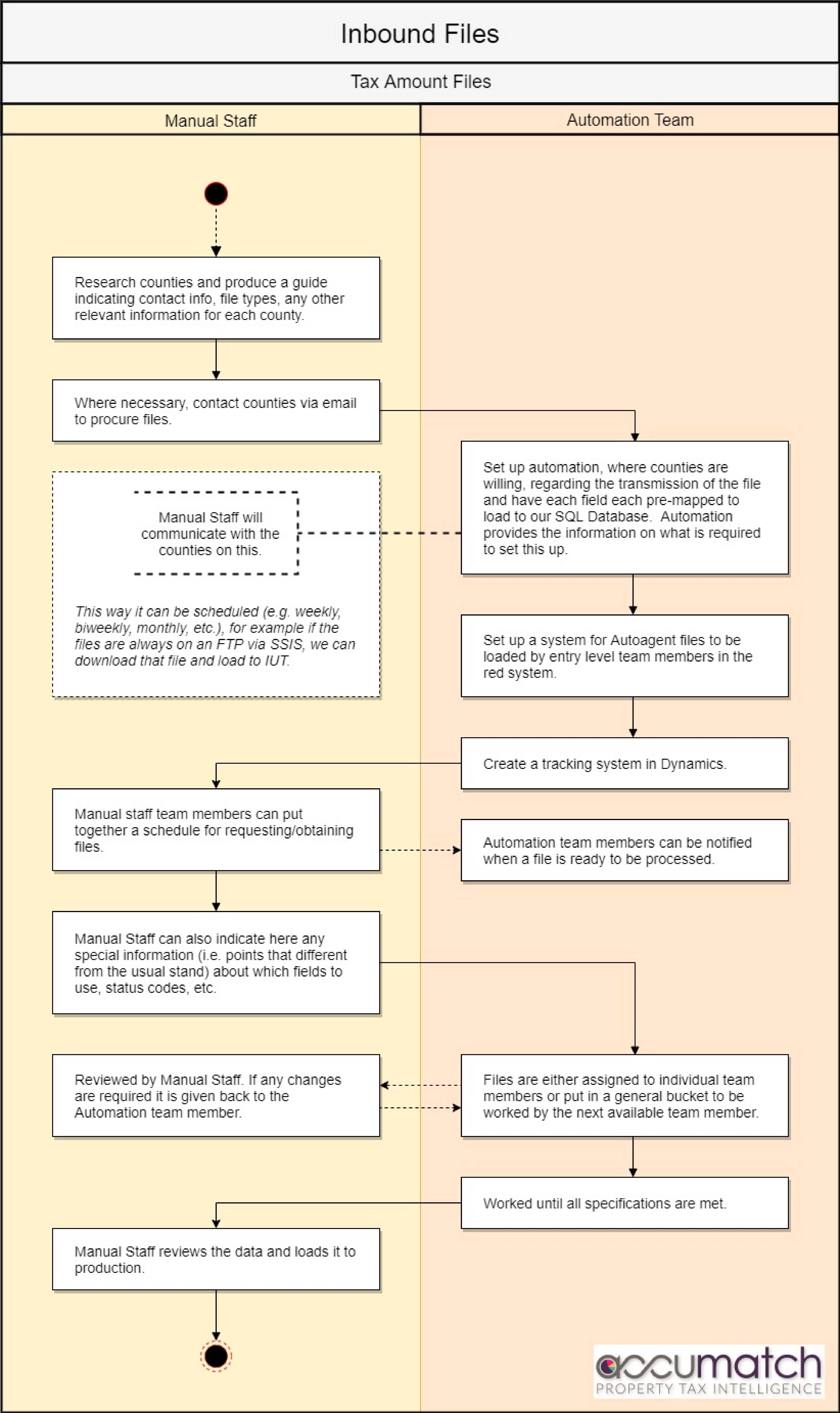
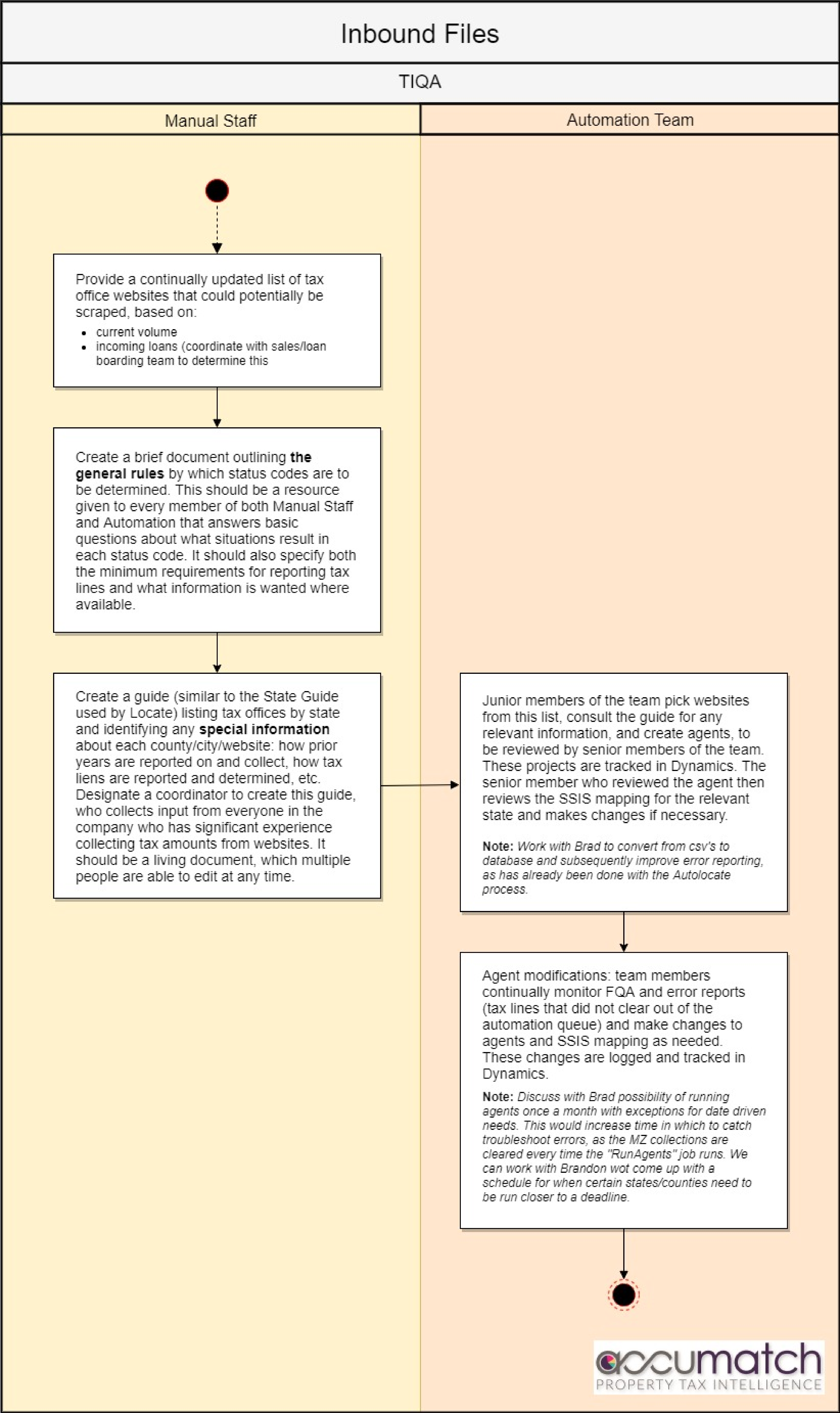

Inbound Files
Tax Amount Files
Manual Staff
Automation Team
Research counties and produce a guide indicating contact info, file types, any other relevant information for each county.
Where necessary, contact counties via email to procure files.
Set up automation, where counties are willing, regarding the transmission of the file and have each field each pre-mapped to load to our SQL Database. Automation provides the information on what is required to set this up.
Manual Staff will communicate with the counties on this.
This way it can be scheduled (e.g. weekly, biweekly, monthly, etc.), for example if the files are always on an FTP via SSIS, we can download that file and load to IUT.
Set up a system for Autoagent files to be loaded by entry level team members in the red system.
Create a tracking system in Dynamics.
Manual staff team members can put together a schedule for requesting/obtaining files.
Automation team members can be notified when a file is ready to be processed.
Manual Staff can also indicate here any special information (i.e. points that different from the usual stand) about which fields to use, status codes, etc.
Reviewed by Manual Staff. If any changes are required it is given back to the Automation team member.
Files are either assigned to individual team members or put in a general bucket to be worked by the next available team member.
Worked until all specifications are met.
Manual Staff reviews the data and loads it to production.
accumatch
PROPERTY TAX INTELLIGENCE


Inbound Files
TIQA
Manual Staff
Automation Team
Provide a continually updated list of tax office websites that could potentially be scraped, based on:
- current volume
- incoming loans (coordinate with sales/loan boarding team to determine this
Create a brief document outlining **the general rules** by which status codes are to be determined. This should be a resource given to every member of both Manual Staff and Automation that answers basic questions about what situations result in each status code. It should also specify both the minimum requirements for reporting tax lines and what information is wanted where available.
Create a guide (similar to the State Guide used by Locate) listing tax offices by state and identifying any **special information** about each county/city/website: how prior years are reported on and collect, how tax liens are reported and determined, etc. Designate a coordinator to create this guide, who collects input from everyone in the company who has significant experience collecting tax amounts from websites. It should be a living document, which multiple people are able to edit at any time.
Junior members of the team pick websites from this list, consult the guide for any relevant information, and create agents, to be reviewed by senior members of the team. These projects are tracked in Dynamics. The senior member who reviewed the agent then reviews the SSIS mapping for the relevant state and makes changes if necessary.
Note: *Work with Brad to convert from csv's to database and subsequently improve error reporting, as has already been done with the Autolocate process.*
Agent modifications: team members continually monitor FQA and error reports (tax lines that did not clear out of the automation queue) and make changes to agents and SSIS mapping as needed. These changes are logged and tracked in Dynamics.
Note: *Discuss with Brad possibility of running agents once a month with exceptions for date driven needs. This would increase time in which to catch troubleshoot errors, as the MZ collections are cleared every time the "RunAgents" job runs. We can work with Brandon wot come up with a schedule for when certain states/counties need to be run closer to a deadline.*
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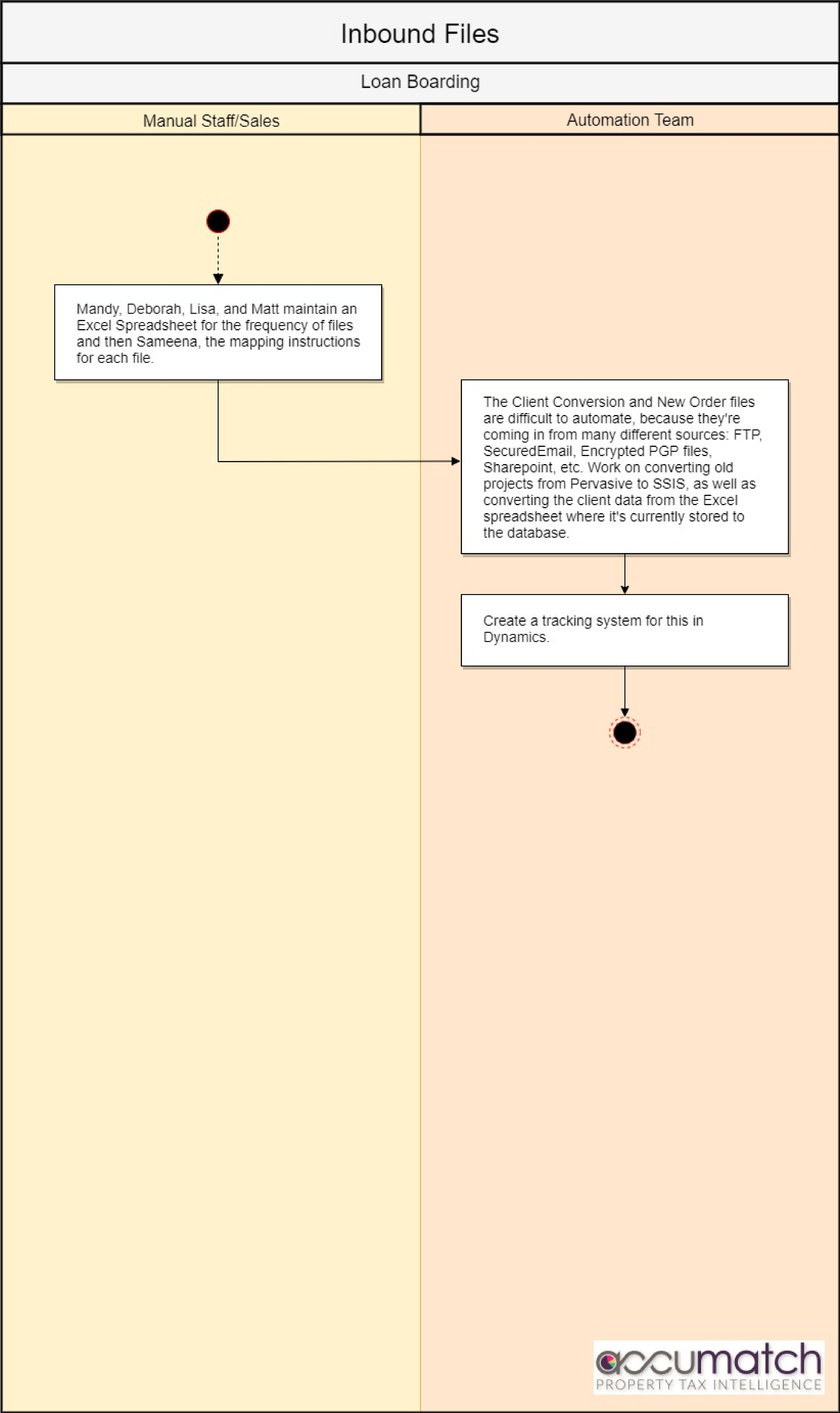
Inbound Files
Loan Boarding
Manual Staff/Sales
Automation Team
Mandy, Deborah, Lisa, and Matt maintain an Excel Spreadsheet for the frequency of files and then Sameena, the mapping instructions for each file.
The Client Conversion and New Order files are difficult to automate, because they're coming in from many different sources: FTP, SecuredEmail, Encrypted PGP files, Sharepoint, etc. Work on converting old projects from Pervasive to SSIS, as well as converting the client data from the Excel spreadsheet where it's currently stored to the database.
Create a tracking system for this in Dynamics.
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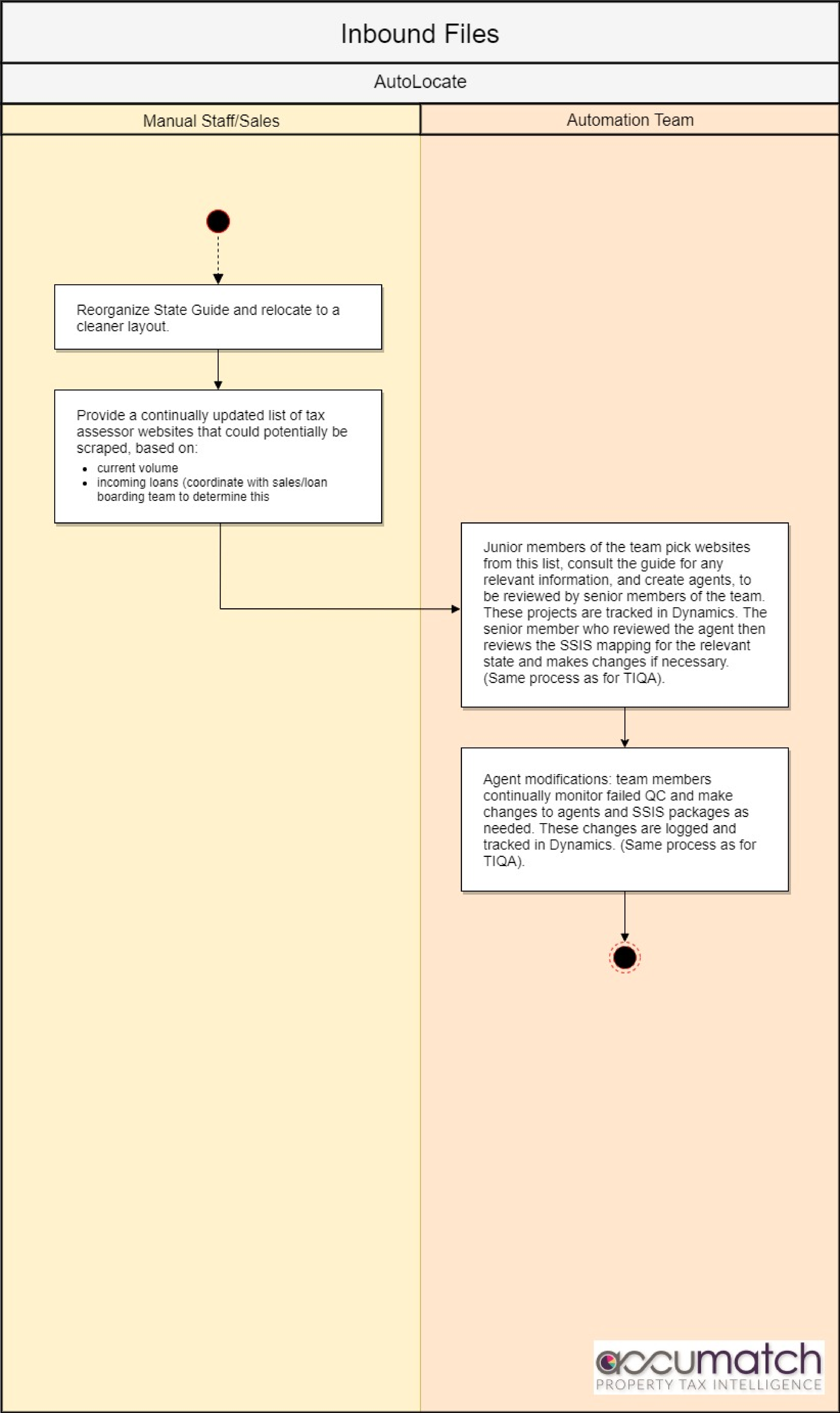
Inbound Files
AutoLocate
Manual Staff/Sales
Automation Team
Reorganize State Guide and relocate to a cleaner layout.
Provide a continually updated list of tax assessor websites that could potentially be scraped, based on:
- current volume
- incoming loans (coordinate with sales/loan boarding team to determine this
Junior members of the team pick websites from this list, consult the guide for any relevant information, and create agents, to be reviewed by senior members of the team. These projects are tracked in Dynamics. The senior member who reviewed the agent then reviews the SSIS mapping for the relevant state and makes changes if necessary. (Same process as for TIQA).
Agent modifications: team members continually monitor failed QC and make changes to agents and SSIS packages as needed. These changes are logged and tracked in Dynamics. (Same process as for TIQA).
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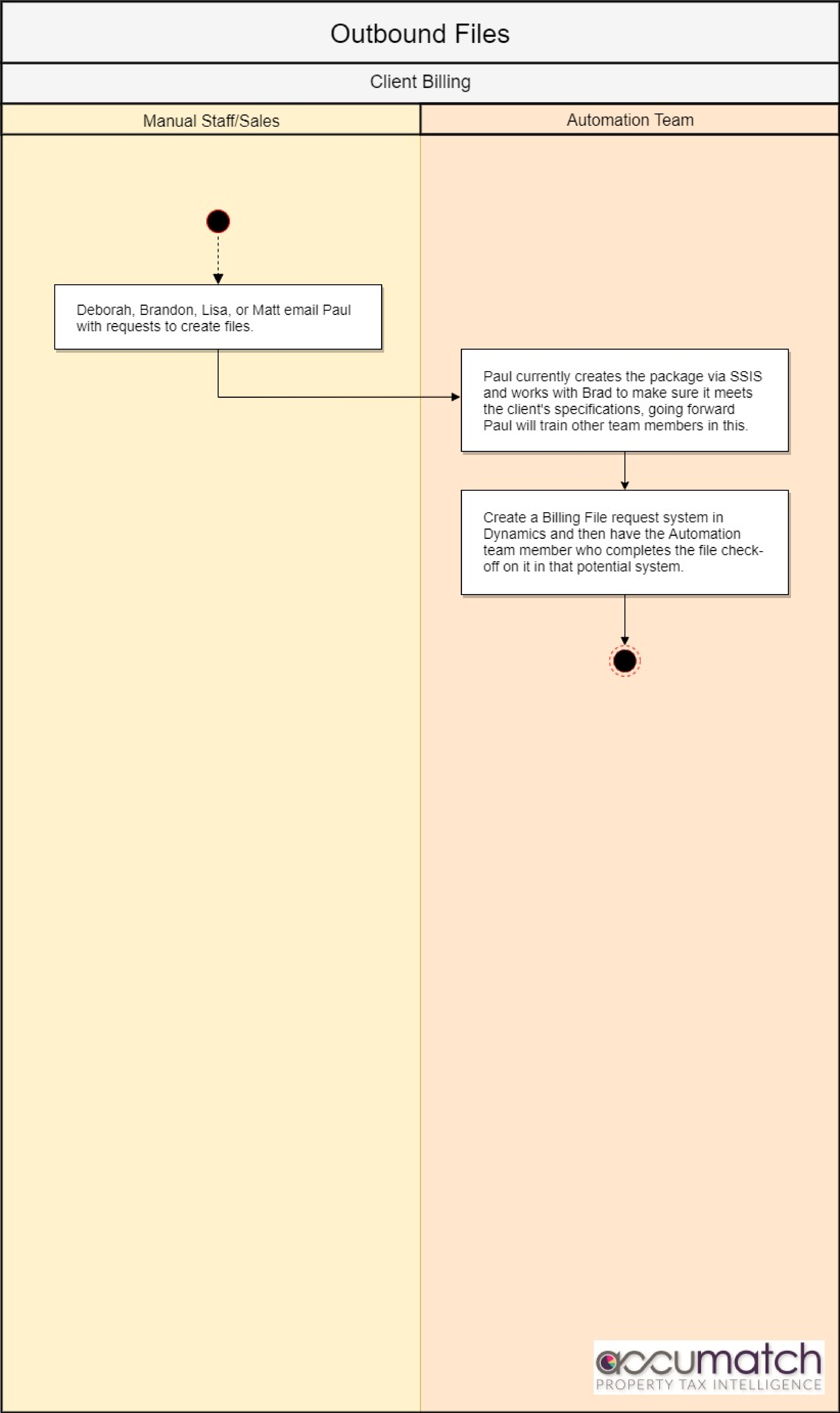
PROPERTY TAX INTELLIGENCE


Outbound Files
Client Billing
Manual Staff/Sales
Automation Team
Deborah, Brandon, Lisa, or Matt email Paul with requests to create files.
Paul currently creates the package via SSIS and works with Brad to make sure it meets the client's specifications, going forward Paul will train other team members in this.
Create a Billing File request system in Dynamics and then have the Automation team member who completes the file check-off on it in that potential system.
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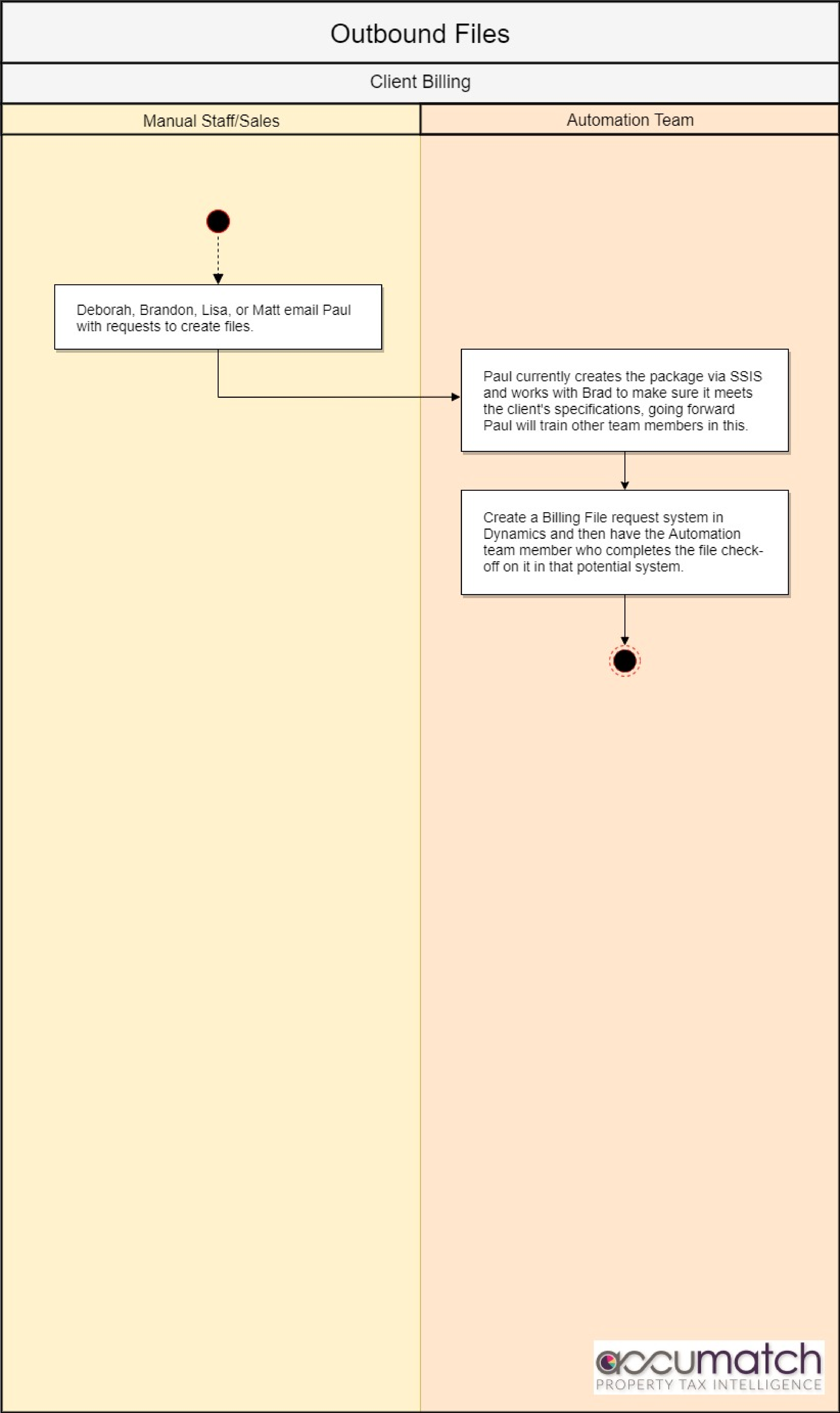
PROPERTY TAX INTELLIGENCE


Outbound Files
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Manual Staff/Sales
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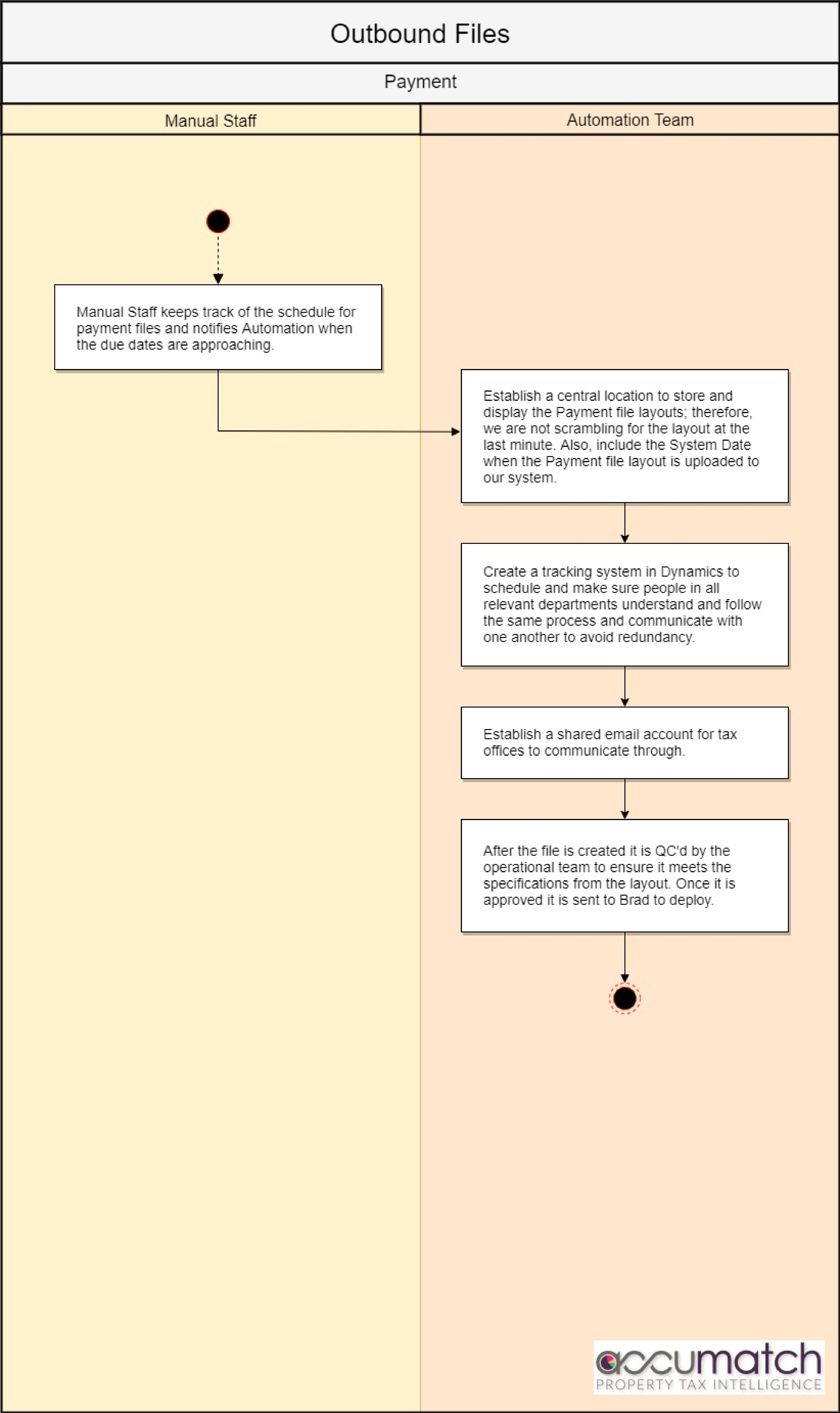
Outbound Files
Payment
Manual Staff
Automation Team
Manual Staff keeps track of the schedule for payment files and notifies Automation when the due dates are approaching.
Establish a central location to store and display the Payment file layouts; therefore, we are not scrambling for the layout at the last minute. Also, include the System Date when the Payment file layout is uploaded to our system.
Create a tracking system in Dynamics to schedule and make sure people in all relevant departments understand and follow the same process and communicate with one another to avoid redundancy.
Establish a shared email account for tax offices to communicate through.
After the file is created it is QC'd by the operational team to ensure it meets the specifications from the layout. Once it is approved it is sent to Brad to deploy.
accumatch
PROPERTY TAX INTELLIGENCE

Outbound Files