



# Technology Advisory Case Study

**Industry:** State and Local Tax (SALT)

**Services:** Document Processing, Automation

**Technologies:** Microsoft .NET, Azure AI Document Intelligence

# Situation

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The SALT department at MarksNelson, a Springline company, periodically needs to process a large number of documents that are publicly available on county websites across the U.S. This department faced significant inefficiencies in its document processing workflow, which relied on manual intervention and lacked any type of automation. These limitations hindered operational effectiveness and increased the risk of errors, impacting the overall quality and timeliness of the department's work. The need for a robust, scalable, and intelligent automation solution became apparent to support evolving business requirements and improve service delivery.

# Solution

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The team implemented a solution that completely automates the process of obtaining the documents from as many county websites as the SALT department may require. Using software bots, the system can accommodate any website and will be able to scale in the future to support other document sources. Once the documents are collected, the system uses AI to extract the data SALT requires. Rather than rely on old OCR systems that require tedious programming methodologies and are prone to fail even with small document changes – and because each county uses completely different document formats to present the same information – the system relies on AI models trained to recognize and extract the same data from multiple document formats.

# Results

The SALT department is now able to obtain and process thousands of documents automatically in a matter of hours. Work that used to take weeks and multiple team members to accomplish is now completely automated, repeatable, and scalable. In addition, this system is not limited to county tax documents but can also be applied to nearly any type of document from multiple sources, such as JPEG, PNG, PDF, and TIFF formats, as well as other Microsoft Office documents like Word, Excel, and PowerPoint.

