



# Treasury Inspector General for Tax Administration (TIGTA) Success Story

## Background

The Treasury Inspector General for Tax Administration (TIGTA), a division of the US Treasury Department, was established under the IRS Restructuring and Reform Act of 1998 to provide independent oversight of IRS activities. TIGTA promotes the economy, efficiency, and effectiveness in the administration of the internal revenue laws. It is also committed to the prevention and detection of fraud, waste, and abuse within the IRS and related entities.

As an auditing entity, TIGTA is staffed with attorneys and other legal council to provide a system of checks, balances, and fairness for the American people. Up to seventy cases per year are pursued by this office.

## The Pain Point

Prior to the introduction of Decos, TIGTA staff had outgrown their system for managing case information. There was a need for more robust reporting capabilities, full functionality and the ability to manage the entire lifecycle of the working cases from 'assignment' to 'retention'. Collecting data in file folders which referenced case state and status helped them retain information but left them with manual processes and lots of paper.

## The Need

TIGTA required a system to capture and record metadata relating to their cases. The right solution would store all documents in any format along with notes and emails relating to any given case in a manner easily tracked and retrieved at a later date. TIGTA needed case lifecycles managed through automated workflows in order to retain case status, assignment and performance targets. The workflows needed to allow ultimate functionality for scheduled archival, retention and destruction of case files based on predetermined business rules, for reporting, alerts, alarms and notifications. TIGTA needed a fully scalable solution that would grow with them and offer unlimited functionality based on configuration and automation customized to their process needs instead of complying to predetermined concepts of how they should operate.

## TIGTA

**Industry**  
Government

### Organization logo



### Business challenges

- ✓ Expanding office load surpassed current office practices
- ✓ Use of separate systems for case data, status, and document management
- ✓ Stress surrounding Compliance Regulations

### Business benefits

- ✓ Ability to streamline case management data
- ✓ Instant access to the right information
- ✓ Automation of time consuming business processes
- ✓ Improved control over documents & document oriented processes
- ✓ Reduction of paper handling & error prone manual processes
- ✓ Reduction of paper storage
- ✓ Improved and automated reporting



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**TODAY** for a D5 DEMO

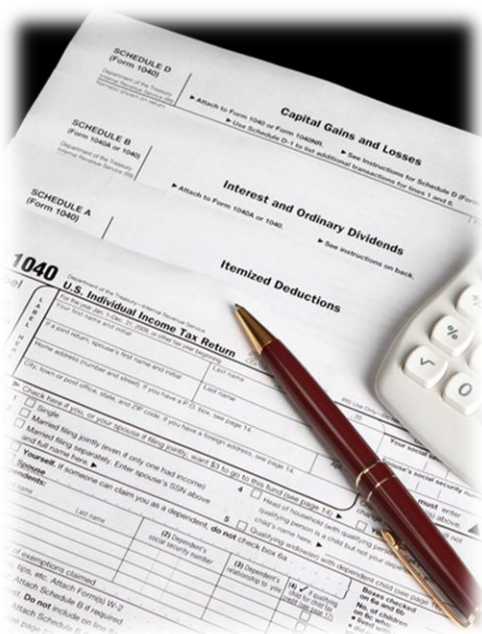


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## The Solution: DECOS D5

Decos D5 case management solution brought TIGTA an enterprise management system able to store, index, cross index and make searchable all standard document types common in offices today. Decos D5 allowed seamless retention of email messages into the document management store. Decos D5 gave TIGTA the ability to tag their documents with metadata capturing valuable information without altering content. Capturing the metadata increased their reporting abilities enabling a bird’s eye view for upper management. Customized workflows automated business processes and alerts, alarms and notifications now prompt users to the next step. Absences are covered by assigning alternate users responsibility for processes when a team member is ill or away from the office. Processes no longer stop mid stream but continue towards fruition because of better collaboration. Full Microsoft Office integration and a familiar look and feel made user adoption easy and training times were minimized.

- Decos D5 provided an advanced workflow platform to control the case lifecycle including the status and state of the case. Thru Workflow the attorneys were able to assign and collaborate on a case as well as route it to management when cases effected policy decisions. Users are alerted or pending tasks or events via the provided portal or email.
- Decos D5 provides customizable reports for tracking the case flows. Reports can be proactively sent via email as columnar reports or excel spreadsheets.
- Decos D5 also provided scanning/capture capabilities to aid in the uploading of material evidence.



## The Implementation

MetaLogix implemented a comprehensive system to streamline case management data, workflow, and document management allowing high levels of reporting in an easily accessed yet secure web based system. TIGTA now has completely searchable electronic case records with documents attached. The fully customizable solution provides deeper levels of security and has automated their business processes and reporting needs.

## Benefits

The feed back after implementation was exciting, to say the least. TIGTA gained many business benefits: fully compliant, case transparency, routing control, event driven processes, reduced case time, improved report ability, simplified reassignment process, improved efficiency and complete scalability.

*Just another DECOS D5 success story. Just another happy client.*



**TIGTA**  
**Treasury Inspector General  
for Tax Administration**  
*Promoting integrity in the administration of internal revenue laws*

