



Making taxes less taxing.

San Francisco City and County Tax Office uses Adobe Experience Manager Forms to deliver a self-service portal to make paying taxes easier for citizens and businesses.



"Integrating Adobe Experience Manager Forms helps us improve customer service by sending timely, automated communications to taxpayers with the status of their requests."

Tajel Shah, Chief Assistant Treasurer, Office of the Treasurer & Tax Collector

SOLUTION

Adobe Experience Cloud, including Adobe Experience Manager Forms within Adobe Marketing Cloud
Adobe Professional Services

RESULTS

10% MORE taxpayers use the new self-service tax portal



Improved **COMMUNICATIONS** about waivers and reprocessing



REDUCED time to create and send property tax bills by nearly half



FASTER billing summaries



City and County of San Francisco, Office of the Treasurer & Tax Collector

San Francisco, California

www.sftreasurer.org

CHALLENGES

- Simplify and centralize city and county tax filings
- Improve online tax services and reduce office visits by citizens
- Reduce late fees and waivers

USE CASE

- Digital Enrollment and Communication

“With Adobe Experience Manager Forms, we offer taxpayers better visibility into what they owe and help them avoid unnecessary penalties.”

Tajel Shah, Chief Assistant Treasurer, Office of the Treasurer & Tax Collector

Serving taxpayers in one of the largest cities in the U.S.

Approximately one million people live and work in the city and county of San Francisco. Taxes paid by the residents and businesses in this thriving city fund services that have helped it become the center for culture, business, and innovation that it is today.

Making it easier for individuals and organizations to pay taxes not only reduces stress for payers, but encourages timely compliance with tax payments. The Office of the Treasurer & Tax Collector for the City and County of San Francisco has long been comfortable with innovation, becoming one of the first organizations to embrace online payments on a large scale.

“Over the years, we’ve upgraded systems, customized components, and redesigned experiences to evolve our business with the times,” says Tajel Shah, Chief Assistant Treasurer, Office of the Treasurer & Tax Collector. “In 2008, with the downturn in the housing market and shrinking budgets, we were forced to rethink tax forms to boost efficiencies. That type of thinking has carried forward into what we’re achieving today.”

The Office identified payment of property taxes as being particularly complicated. Taxpayers needed to visit up to four portals to handle all payments, which could include supplemental payments for renovations or permits. The process was confusing, and taxpayers would often unintentionally miss payments. The Office began looking for solutions that could help it simplify workflows and scale to meet the needs of all taxpayers.

“We’re responsible for collecting and managing approximately \$9 billion for the city and county—the stakes are high and we need to do our job as accurately and efficiently as possible,” say Shah. “The Forms capability within Adobe Experience Manager is an important component to help make that happen.”

Self-service portal for efficient online services

The Office of the Treasurer & Tax Collector transformed its front-end systems by redesigning landing pages for taxpayers and consolidating the four separate tax payment portals into a single system powered by Adobe Experience Manager Forms.

“With Adobe Experience Manager Forms, we offer taxpayers better visibility into what they owe and help them avoid unnecessary penalties,” says Shah.

When a taxpayer enters information into the payment portal, Adobe Experience Manager Forms feeds data to back-end systems that identify the taxpayer and connects any additional tax information to that individual or business. Adobe Experience Manager Forms then outputs payments and payer data into a customized PDF billing statement that is printed and mailed to taxpayers for an instant record of unpaid balances. Another example is a change of address request that automatically generates a customized PDF, emailed to both the new and old mailing address to confirm the changes.

“With an expected additional 10% growth in use, along with new efficiencies gained by leveraging additional Adobe Experience Manager capabilities, the sky is the limit to what we can do.”

Tajel Shah, Chief Assistant Treasurer, Office of the Treasurer & Tax Collector

SOLUTION AT A GLANCE

Adobe Experience Cloud, including:

Adobe Marketing Cloud

- Adobe Experience Manager
- Forms

Adobe Professional Services

For more information

www.adobe.com/experience-cloud.html

www.adobe.com/experience-cloud/service-support/professional-services.html

www.adobe.com/marketing-cloud/experience-manager/forms-document-management.html



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“A lot of time and resources are spent processing requests for penalty waivers where the individual or business either isn’t aware of additional taxes that needed to be paid or didn’t get the additional notification in time,” says Shah. “Integrating Adobe Experience Manager Forms into the waiver process helps us improve customer service by sending timely, automated communications to taxpayers with the status of their requests.”

Igniting a transformation

The Office of the Treasurer & Tax Collector reached out to Adobe Professional Services to accelerate deployment of the new technology and encourage best practices.

“To continue to scale and perform efficiently in the future, it’s important that we learn to manage projects internally and become self-sufficient,” says Shah. “Working hand in hand with Adobe Professional Services was an invaluable component to our early success. In future engagements, our internal teams will handle work themselves, but Adobe will continue to provide expert advice that will help us remain successful.”

As a result of the migration from Adobe LiveCycle to Adobe Experience Manager Forms, the City is able to expand the output of communications from 200,000 to more than 1 million interactions with citizens and businesses. Due to the successful implementation, the Office is encouraged to expand its deployment of Adobe solutions, looking to leverage additional capabilities within Adobe Experience Manager Forms within its tax portal and for taxpayer-facing forms.

Paying taxes in ‘the now’

Since the new tax portal launched, the Office of the Treasurer & Tax Collector increased efficiencies and automation, cut costs, and is communicating more effectively with taxpayers. The Office has nearly halved the time needed to create and send property tax bills while eliminating errors through automation. And by clarifying payments, taxpayers are filing fewer waivers and delivering more payments on time.

Taxpayers are also encouraged by the new tax portal. The Office has seen a 10% increase in tax portal users year-over-year and fewer in-office visitors. “Self service through the portal is the fastest, most efficient way for our office and for taxpayers to work together,” says Shah. “With an expected additional 10% growth in use, along with new efficiencies gained by leveraging additional Adobe Experience Manager capabilities, the sky is the limit to what we can do.”