

# formscan

## CSL use 'OCR for Forms' to improve efficiency at London Borough of Croydon

### Background

CSL are current providers of all Financial Services for the London Borough of Croydon. The Financial Services contract dictates stringent Service Level Agreements with the Authority, which has made high levels of operational efficiency a critical success factor for CSL, in delivering quality services within budget. IT solutions have played a crucial role in this efficiency drive, and in 1996 CSL invested in a Document Management administrative support system for the Housing Benefits and Council Tax Divisions, which incorporated the OCR for Forms data capture software.

### Review Form Success

OCR for Forms was immediately utilised for 'review form' processing within Housing Benefits and Council Tax. The Council Tax review forms are specifically targeted at single person discount and exemption claimants. A 'tick-box' form is required to be completed by each claimant on a number of occasions throughout the year, to confirm the accuracy of the Authority's client record details. Up to 10,000 Council Tax forms are automatically processed, through the OCR for Forms system, and until recent changes in legislation, 3,000 Housing Benefits review forms were also processed through the system. This culminates in the production of an output file to update central client databases with any necessary changes.

Today, using OCR for forms, the processing of Council Tax Review forms is managed by fewer staff, with faster turn-round

### Expansion of System for Time Sheet Administration

Once the initial application was successfully established, and realised true business benefits, further uses for OCR for Forms were explored. In parallel, the Payroll department was already seeking a more efficient method of managing its weekly time sheet administration for all non-teaching staff. All time sheet details for the 2,400 non-teaching employees within 138 schools had been manually input to the mainframe payroll system, with the task taking an operator 3 full days to complete each week.

Mike Runge – Project Analyst, IT Support Unit commented: *"Manually processing this volume of data was proving very time consuming and prone to error, therefore a more efficient and cost effective solution was essential."* *"With our experience of the benefits of data capture technology, we felt OCR for Forms would offer an ideal solution for timesheet processing."*

### Business Process Review

CSL's IT Unit worked closely with the Payroll Department on a complete review of the time sheet procedure, in order to identify the most appropriate improvements. On completion of the review two recommendations for change were made: Firstly that a database application be produced to record all 'standard' pay information for each employee, as much of the data for input did not vary from week to week. A report would then be sent to each school containing employee's standard pay details, for completion only with variable information (i.e. hours and minutes worked each week, by each employee). All forms would then be returned to the Payroll department, completed by hand with changeable timesheet information. The second recommendation was to utilise the OCR for Forms data capture system to scan all completed forms. This approach would offer the required increase in both speed and accuracy for the weekly data input operation, with less manual intervention.

## **The Implementation Process**

In early 1998 the new project commenced with Microsoft Access being selected as the database to produce the standard time sheet forms. The IT Support Unit worked with the Payroll department to define the necessary information to be captured, and create a style of form best suited for the inclusion of handprint and subsequent scanning by the OCR for Forms system.

## **Pilot Scheme Established**

The Payroll Manager then set about identifying a number of schools to pilot the new timesheet system, with 12 schools being ultimately selected. Both the Payroll Manager and the Payroll Controller worked closely with all schools concerned to advise on best methods of form completion for scanning purposes, in order to ensure high levels of scanning accuracy. To achieve this, one individual per school was nominated to complete all forms with hand written hours and minutes worked, per employee.

## **Time sheets being processed in a third less time**

Payroll clerks were trained to scan documents into OCR for Forms, and were very quickly able to trial sample data from the participating schools. Within a few months the pilot Timesheet System established live operation, and almost immediately the processing of timesheets was improved by one third. As a result of the dramatic improvement, further schools have subsequently been added to the scheme, with a plan to rollout to all remaining schools by the end of 1999.

Mike Runge commented on the success of the system: *“By allowing us to quickly and easily capture data at source, with minimal human intervention, OCR for Forms has delivered significant business benefits to CSL, and to the service we provide to our customer, the London Borough of Croydon.”*

## **The Future**

The simplicity and effectiveness of OCR for Forms has now been proven, and CSL have a practical demonstration of OCR for Forms technology to improve efficiency, reduce administration, and meet deadlines. As a result of this dramatic success, further uses for OCR for Forms will also be explored to bring similar benefits in other areas of administration.

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