Redefining Tax Services with RPA

Use Case Overview:

Within the Public Sector, digital government services or E-government, have transformed the way citizens interact with their government. These services encompass a wide range of activities, from filing tax returns to obtaining driver's licenses or pet licenses. Traditionally, these services were delivered through in-person interactions, often involving multiple government departments and paper forms. However, the advent of digital services has revolutionized this landscape. Now, governments can deliver information and services to citizens through digital channels, anytime, anywhere, and on any platform or device.

Challenges/Pain Points:

1. Tax Reporting:
   - Manual data collection from multiple sources and financial accounts.
   - Use of Excel sheets for interim provision calculations.
   - Excessive reliance on emails for updates due to disconnected systems.
2. Tax Calculations:
   - The complexity of handling large volumes of tax-related data.
   - Continued use of manual spreadsheets, posing a risk of errors.
   - Potential financial losses due to errors in different tax systems.

Solution:

The solution to these challenges lies in the implementation of Robotic Process Automation (RPA) for tax-related processes in the Public Sector. By deploying RPA bots, government agencies can significantly enhance the efficiency of tax reporting and reduce the risk of errors. These bots can automate various tax-related tasks, ensuring compliance with predefined rules and rates while calculating taxes accurately.

For example, in the case of tax calculations for e-commerce businesses, RPA bots can be deployed across platforms like Mada, Sadad and Esal to collect and organize sales tax data. This automation guarantees that tax reporting requirements are met, rates are calculated accurately, and tax obligations are fulfilled on time.

Benefits:

1.Enhanced Speed and Accuracy:

RPA bots perform tasks faster and with a high degree of accuracy, reducing the risk of errors that occur during manual data entry.

2.Data Discrepancy Identification:

Bots can identify discrepancies in data to find missing and wrong data in the tax data and promptly notify relevant personnel, enabling swift resolution.

3.Improved Employee Focus:

Tax automation shifts the focus of employees from repetitive tasks to more intellectually demanding responsibilities such as judgments, estimates, and complex transactions, making human labor more valuable.

4.Increased Productivity:

Bots can complete work that typically takes hours for an employee to finish in a matter of minutes, boosting overall productivity.
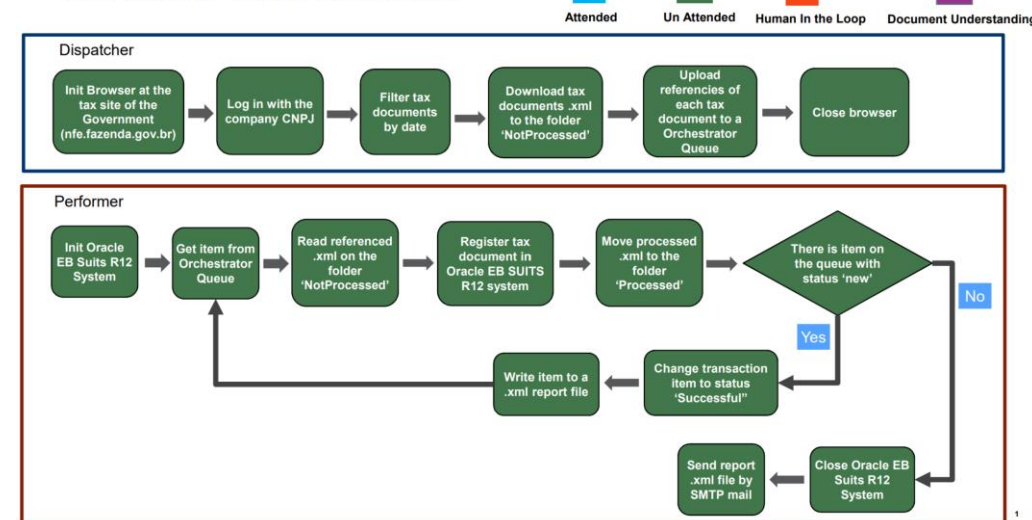
5.Handling Large Volumes:

RPA bots excel at processing vast amounts of documents, performing data extraction from sources like PDFs, OCR, and emails, making calculations, consolidating results, and generating updated reports in real-time.

6.Comprehensive Support:

Bots assist tax professionals in various services, including annual and interim tax provision, tax audit management, compliance, and offer just-in-time support, improving overall tax-related operations in the Public Sector.

By adopting RPA tools, the Public Sector can unlock the potential for streamlined, efficient, and error-free tax services, benefiting both government agencies and the citizens they serve.

To-BE Workflow – Entry of Tax Operations

Legend: Attended | Un Attended | Human In the Loop | Document Understanding

Dispatcher: Init Browser at the tax site of the Government (nfe.fazenda.gov.br) → Log in with the company CNPJ → Filter tax documents by date → Download tax documents .xml to the folder 'NotProcessed' → Upload referencies of each tax document to a Orchestrator Queue → Close browser

Performer: Init Oracle EB Suits R12 System → Get item from Orchestrator Queue → Read referenced .xml on the folder 'NotProcessed' → Register tax document in Oracle EB SUITS R12 system → Move processed .xml to the folder 'Processed' → There is item on the queue with status 'new' → (No / Yes) → Change transaction item to status 'Successful' → Write item to a .xml report file → Close Oracle EB Suits R12 System → Send report .xml file by SMTP mail

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