

# NOTICENINJA



## Case Study:

### TriNet Automates Handling Process for 80,000+ Tax Notices

When TriNet began its partnership with **NOTICENINJA**, they balanced between 60,000 and 80,000 written tax notices between 20 people. Knowing that number would only grow, they knew this setup was unsustainable.

So, when they searched for a solution and found **NOTICENINJA**, they could increase their efficiencies to stay on top of their workflow.

“We needed to be able to notate when it was that it came in, what we needed, and be able to track the process of it, which is exactly what ANTS does,” Bryce Thompson said. “It's essentially a workflow tracking system for the notices. So... the key thing was that we were going to be able to record a notice record. The detail that we needed about the notice and be able to track the progress of remediating.”



#### THE CHALLENGE

TriNet's issue was managing the extensive amount of documentation they had with the appropriate workflow, tracking the information provided to know what they needed to do and when to submit documentation on time. They handle tax processes with the Department of Revenue in all 50 states, 3 additional U.S. territories, and at the federal level—meaning they have a lot to manage.

While they had other software they were using to handle the workload previously, it wasn't able to handle the level of information they needed to store. The software was also quite slow.

All of these issues came to the forefront when TriNet made some acquisitions that doubled their number of clients, and doubled their notice volume with it.




#### THE SOLUTION

**NOTICENINJA** provided an all-encompassing software system allowing TriNet to scan every paper document into their system and automatically create a readable and editable file using **NOTICENINJA**'s optical recognition tool. Furthermore, they can add notation for every piece as it gets placed into the workflow.

#### AT A GLANCE:

- TriNet handles more than 80,000 payroll tax notices per year.
- Their previous software didn't allow them to store the amount of information they needed to handle their notices correctly.
- They needed to be able to record notices from taxing jurisdictions and work them through to their conclusion.



“I would certainly [recommend NOTICENINJA] for... the ease of use, being able to scan notices in, having everything in one place, and then the workflow function.”

— Bryce Thompson  
Senior Tax Analyst, TriNet



### THE SOLUTION, CTD.

Rate notices, address changes, liens, levies, and anything that comes in from the taxing jurisdictions, gets placed into its designated place for the company to check easily.

“The accuracy of having everything in one place in the advantages of having the workflow function and moving away from paper. That's the core thing,” he said. “No more stuff sitting on desktops or in drawers.”

TriNet had **NOTICENINJA** help them manage rate tracking. That’s not an out-of-the-box service offered, but **NOTICENINJA** developed an app to maneuver around changing insurance rates, like state unemployment insurance, and use that information to their benefit.

“It was a fairly large structural addition, and they turned it around pretty quickly and it's working great for us,” Mr. Thompson said. “There has been that flexibility that we've really appreciated. We've gotten it to the point where it really works very well specifically for what TriNet needs to have it do.”



### THE SUCCESS

TriNet improved its systems management drastically, since working with **NOTICENINJA**. The partnership has streamlined their process, saving them time and allowing for better control. With a paper-based process, they relied too much on one individual doing their job. But, with **NOTICENINJA**, they can manage the people who ensure the workflow succeeds for quality control and compliance.

The first step in their process is now to scan documents into **NOTICENINJA**. Their mailroom delivers pallets of documentation to a team of 5 people, who scan the documents into the database. It no longer sits in a desk with the potential to be lost—everything is in one place.

“The security and reliability of knowing that everything is in one place brings tremendous peace of mind,” he said.