

# CUSTOMER SPOTLIGHT

ROANOKE, VIRGINIA

## INTEGRATED SYSTEM PROVIDES EFFICIENCY, IMPROVES TAXPAYER EXPERIENCE

Located in Roanoke Valley and nestled in the Blue Ridge Mountains, Roanoke, Virginia, is affectionately known as the Star City of the South. The city was established as Big Lick in 1852, and offers a rich colonial history that can be experienced through the city's landmarks, shops, and numerous outdoor explorations. A mid-sized but robust city with a population of 96,714, Roanoke's residents and visitors alike enjoy its charm and hospitality.



### THE CHALLENGE: FINDING AN INTEGRATED PROPERTY TAX SOLUTION



This growing, scenic city, named as one of "America's Most Livable Cities," has used an aggressive economic

strategy to ensure robust business development. And to keep up with this growth, the city needed a property valuation solution that could accurately handle the data and ensure efficiency.

Roanoke's City Treasurer Evelyn Powers and Director, Real Estate Valuation Susan Lower searched for a solution to the city's outdated valuation processes. Powers explains the challenges the city was facing: "We were on an old legacy system that was written in-house. The goal was to pick a system that would include cashiering so that all of the pieces of collecting would be within the same system."

While the existing platform served its purpose for a time, there was a need to make the processes more efficient. The varied departments couldn't easily share taxpayer information and cashiering was separate from collecting. The legacy system wasn't automated and required time-consuming tasks; permits were printed out by hand, and if a taxpayer had a credit on an account, one department would have to physically cut a check to deposit to another department, rather than simply transferring the account data and

funds. Operating in this fashion resulted in lengthy turnaround time, thereby increasing costs to manage the tax needs for the city. In the end, this affected the quality of service the city wished to deliver for taxpayers.

Another consideration was that departments couldn't easily share information. This made it challenging for employees to understand one another's business modules and the unique needs and challenges that came with them.

In an effort to find an overall solution, Roanoke successfully implemented the standalone ProVal system in 2000. It offered relief for management, but the city was eager to move to the next level of integration, and set out to find an integrated solution that enabled the Assessor, Commissioner of Revenue, and Tax Collection offices to seamlessly interact.

In 2007, the search began for a system that would pull all tax types together into a central location that could be accessed by any department. Important in this search was a system that would allow for the migration of existing data as seamlessly as possible.

Adding to the challenge was that Roanoke's system has always been different from other cities' processes. "We had a hard time finding a vendor who understood our unique Virginia requirements," said Lower. "And trying to find the integration we needed seemed daunting."



**THE SOLUTION:****THOMSON REUTERS AUMENTUM**

After evaluating several options, Powers and Lower found that Thomson Reuters Aumentum would best meet their needs.

This included an upgrade to the city's ProVal system that would integrate with Aumentum

Tax. "We decided to start with cashiering and real estate and add more tax types as soon as we can ensure a smooth integration," said Powers.

The upgrade in ProVal provides Roanoke with a complete range of appraisal tools using the latest advancements in GIS, sketching, and workflow. It enables staff to easily and confidently access information immediately for improved customer service.

Through Aumentum Tax, payments could be processed immediately, instead of waiting overnight. It also made the abatement system easier to manage.

"What made this whole process easier was the accessibility of the Thomson Reuters team to help us through it from beginning to end. In fact, our strong, positive relationship with the ProVal experts helped us in our decision to move to the integrated system," said Lower.

**THE BENEFITS:****LESS HASSLE, LOWER COSTS**

Susan Lower welcomes the improved efficiency that Aumentum has brought the city. "We're now better able to manage taxes for the elderly, land use, veterans, etc. I like that everything is

centralized in one place, user friendly, tabular, and easy to find. And staff better understands what each department does."

Costs for mailing bills have been lowered as now billing information can be printed so that all information is shown in a window envelope rather than printing labels. Advanced payments can now be posted immediately in the software and applied to a resident's account, ready for viewing any time instead of being held until the payment needed to be applied.

City officials never have to leave their office — all information is now downloaded into a pdf file that's accessible to the personnel that prints them. No more walking checks throughout the building. And manually keying in information is history; a SQL database enables automatic data population.

Evelyn Powers appreciates the benefits of automation and looks forward to continued improvement.

"Cashiering is much easier. We can pull up all of the tax types a taxpayer wants to pay and put the payment all on one receipt. We can reallocate payments and process tax charge corrections through the system in a real-time environment. It is more efficient and has made training easier because everything is in the same place."

The city hopes to soon add the same benefits to both personal property and business revenue.

Adds Lower, "We look forward to working with the Aumentum staff to help us integrate additional or new upgrades that give us the ability to serve our constituency to the best of our ability."

