



PROSERV/FINSERV IDP

Streamlining case management with
intelligent document processing

OVERVIEW

A national tax support provider partnered with 11:59 to build a custom intelligent document processing solution to streamline their financial document intake. During peak season, the manual process consumed thousands of hours. To improve efficiency and accuracy, the client needed a solution that could process documents quickly and securely—then pass that data into their case management system for downstream use.

CHALLENGE

The client handles tens of thousands of financial documents annually. To better support their customers, they needed a system that could reliably handle a wide variety of inputs, including digital and scanned documents, photos, and personal identification.

AI-POWERED INTAKE

11:59 built a serverless Intelligent document processing solution in AWS using Lambdas, Step Functions, Textract, and Bedrock. When a document is uploaded, the system reads and extracts key information, then sends it to the client's case management system via API. This data is used to automatically update the relevant case file—saving time and accelerating case management.

SOLUTION

Approach

We began with a focused proof of concept, delivered in eight weeks. Once the client validated those results, two follow-on phases were planned to refine and expand the solution. Document types were prioritized based on volume to ensure each new feature delivered immediate operational value.

Outcome

The solution is now live in the client's production environment and undergoing extensive testing and refinement to ensure it meets their success criteria. 11:59 continues to support integration and enhancements with the client's case management system.