



Multistate tax agency uses Cleo to securely share audit files too large for email



Company:
Multistate Tax Commission
Headquarters:
Washington, D.C.
Founded: 1967
Industry: Government
Employees: 50
Business need: Secure file sharing for large files

Business Need

The Multistate Tax Commission (MTC) is an intergovernmental state tax agency whose members are the directors of the state revenue departments in various states. The organization typically has one or more representatives from these agencies that participate in committees, programs, and meetings. MTC provides members with services including research and analysis of tax issues, joint audits, multistate settlement of tax liabilities, litigation support, and training. The public also participates in certain programs of the commission, including work drafting uniform laws and regulations.

With most of its workforce remote, exchanging audit information – while adhering to IRS security rules – was a cumbersome process. MTC sought for an easy, secure way to send files that were too large to be sent by email.

Multistate tax agency uses Cleo to securely share audit files too large for email

IT Challenge

The tax commission depends upon a couple of scenarios that require secure file transfer capabilities. MTC staff members exchange documents with other MTC staffers, and MTC staffers share files with MTC program members. But the commission's staff is comprised of numerous remote workers, which put a wrinkle into project workflows that required constant collaboration. If an MTC staff member completed a large assignment and sought internal approval, for example, the staff member couldn't just put the assignment on the network share and have his/her supervisors approve it.

"We did not have an MFT (managed file transfer) system for sharing these files," said Chris Lane, network administrator at Multistate Tax Commission. "If files were too large to be sent by email, we would burn an encrypted DVD and send it via USPS, UPS, or FedEx. If it was time sensitive, we would break the file into pieces and send it via our secure mail system. None of it was ideal."

And because these documents contained sensitive personal information, MTC required an on-premise solution to govern and control the files.

"A solution like Dropbox, OneDrive, etc. did not fulfill our needs," Lane said.

When Lane received an email introducing Cleo's MFT capabilities, he inquired about a possible fit.

The Growing Problem with Growing File Sizes

The file sharing and collaboration challenges that Multistate Tax Commission experienced are all-too-common in a business world where file sizes and types, as well as remote workforces, are ever-increasing.

Businesses must be able to share files large and small inside and outside the company securely, easily, and with a complete auditable history, but their legacy data movement solutions can't always deliver on these needs.

Companies no longer have to find creative ways – breaking down files, overnighting burned discs, and even using cloud-based consumer-grade solutions – to share large files.



Multistate tax agency uses Cleo to securely share audit files too large for email

The Solution

The Multistate Tax Commission deployed Cleo Integration Cloud and leveraged its secure file sharing capabilities. With Cleo, staff members can now upload the file(s) to Cleo Integration Cloud and add his or her supervisor as a collaborator. The assignment can then be downloaded, reviewed, marked up, and re-uploaded to the Cleo platform when the supervisor is finished. Additionally, MTC personnel can create folders to easily obtain substantiating documents from program members when they are needed to complete an assignment.

“The ‘Activity’ tab is great because you can tell when the collaborator has downloaded the file(s),” Lane said.

MTC team members are no longer burning encrypted DVDs and sending them via registered mail or courier delivery services, which means significant time and monetary savings for the organization – and for its clients.

“The Cleo software also has streamlined the transfer process for when our customers send files to us,” Lane said, “and this provides time and monetary savings for them as well.”



“Cleo delivered exactly what we needed: secure file sharing for files too large for email. Cleo does a WHOLE lot more than that, and in the future, I hope to leverage those things should the need arise.”

– **Chris Lane**,
network administrator
at Multistate Tax
Commission

