

# Tax Refund Process Automation

## Process Overview

The process involved validation and processing of Refund (only 'Tax Refunds' type) on Airline's PSS (Passenger Service System) basis standard and defined business rules/policies. The airline's finance team had to manually calculate the tax refund amount for each PNR basis the 'Fee Code' logic and validate with the amount sent by call centre team in an excel.

## Automation Need

The major reasons that led to the need for automating this process were:

- Manual errors due to misinterpretation, oversights or inaccurate calculation leading to revenue leakages
- Non-adherence to SLAs due to high volumes, especially during peak season or disruptions, manual validation and processing
- Dependency on skilled staff as the tasks involved could only be completed by few skilled resources
- Extra attention to avoid fines or penalties for non-compliance
- Slow turnaround causing backlogs and volume spikes

## About the Client

The client is an Asian low cost carrier that provides scheduled air service to 27 destinations in Asia with a fleet size of 24. The airline's main hub at Hong Kong International Airport uses a fleet that consists exclusively of the Airbus A320 family.

## Solution

- IGT Solutions (IGT) assessed the process to identify the scope and potential for RPA based automation. A POC (Proof of Concept) solution was designed that emulated the manual steps required to process a 'Refund' request while using PSS APIs for fetching fees and taxes associated with a PNR.
- A bot was configured basis a decision matrix built for eligible PNR scenarios.
- Bot filtered the 'Tax Refund' cases in the excel input received from the contact centre team and checked the PNR eligibility basis passenger status in the PSS. For eligible PNRs, Bot fetched the fees and taxes leveraging integration with PSS APIs and then calculated the refund amount, which was compared with the amount in the input excel.
- Post amount validation, the bot changed the status of the flight/s in the 'Flight Operations System' and deleted those flight segment(s) required for refund processing at the PSS.
- The bot chose the same payment method, entered the refund amount and approved it for payment release basis defined business rules.
- For any fallouts that required human intervention, exceptional scenarios were recorded and notified to be managed manually.

## Benefits

- **50% reduction** in the time taken to complete a refund transaction
- Better quality with 99.9% accuracy
- Around **50% reduction** in workforce expenses; manual effort was only required for bot fallout or exception cases
- Round the clock operation solving issues of backlog caused by time lag, quality or speed of processing
- Able to meet tighter regulatory compliance SLAs thus lowering business risk

## Applications in Scope

- Navitaire PSS and Go Now Flight Operations System
  - MS Excel
  - MS Outlook
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## Automation Tool Partner

- UiPath