



Canada Revenue Agency's Digital Journey

Speaker

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Canada Revenue
Agency

Agence du revenu
du Canada

Canada 

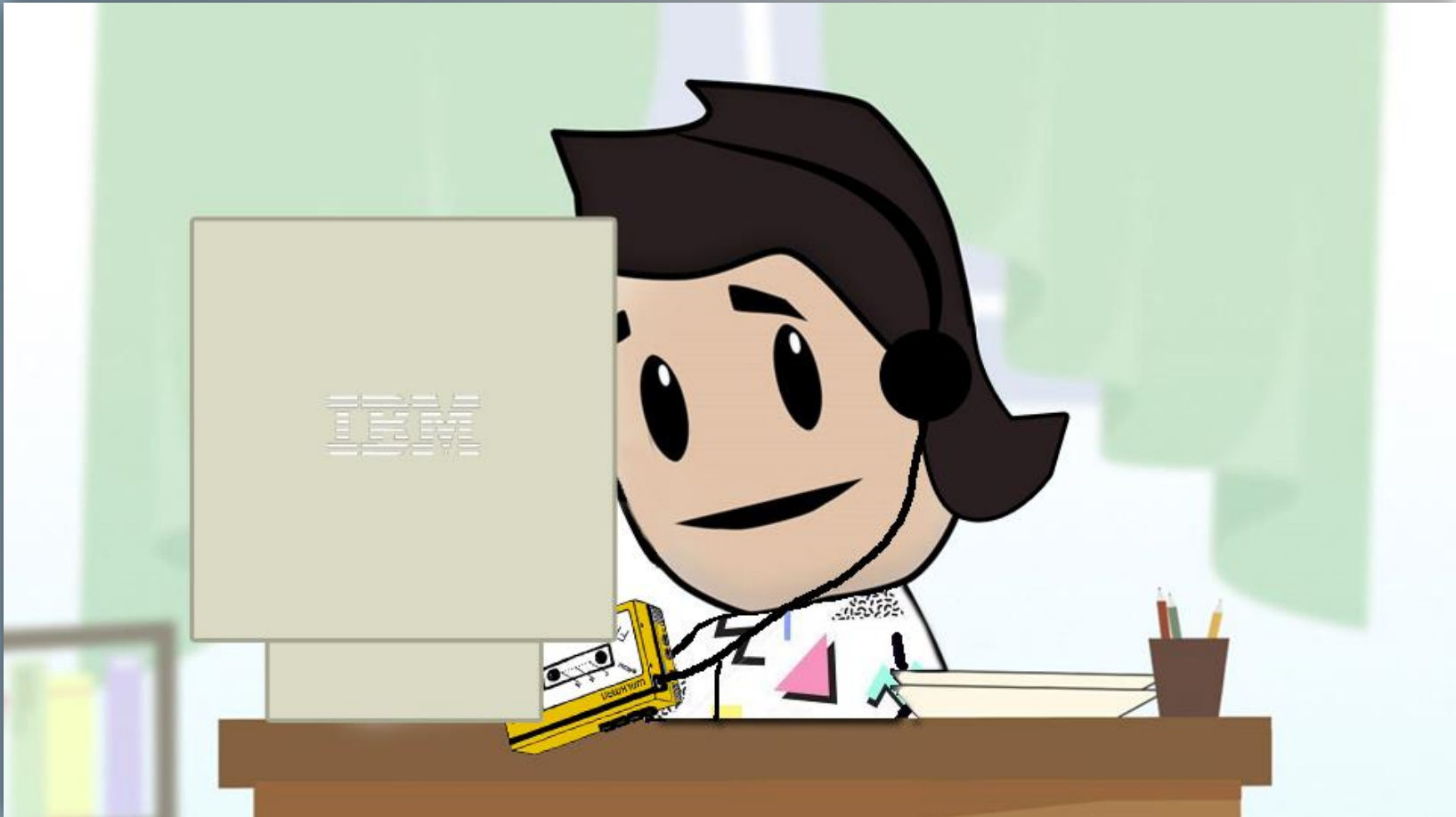
About CRA

Mission, vision, promise, and values



Our journey

Back in the day



Our journey

The vision



- People started to file tax and benefit returns online (move to paperless);
 - ✓ Needed to build the tools to support them
 - ✓ Needed to balance ease with security requirements
 - ✓ Needed to build from client perspective

Easy as...

1 2 3

The text 'Easy as...' is in a large, bold, black font. To its right are three overlapping circles. The first circle is purple and contains the number '1'. The second circle is teal and contains the number '2'. The third circle is grey and contains the number '3'. The circles overlap in a Venn diagram style.

Our journey

The strategy



- Government of Canada's Online Strategy
 - Deliver key federal programs and services online;
 - Encourage end-to-end electronic service delivery.

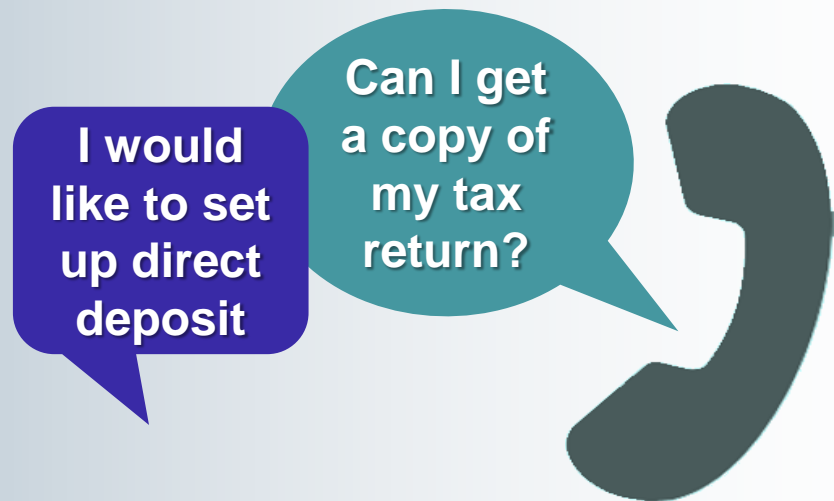


Our journey

Understanding our clients' needs



- My Account sought to create a self-serve option for common telephone call requests
- CRA examined which processes (telephone, paper mail) could be made into digital self-serve



Our journey

My Account highlights



My Account is available to taxpayers



**Set up payment &
apply for child benefits**



Online mail



2003



2004



2005



2007



2010



2015



**Change
my return**



**View direct
deposit**

**View tax
information slips**

Our journey

The development of My Account



Development followed a fairly standard industry method for project management.



Our journey

Assessment tools for My Account



Can taxpayers find the information and complete the tasks they want to?



Public opinion research

- Usability testing
- Focus testing



Client feedback

- Surveys
- Comments
- Telephone agents



Web statistics



Today at a glance

Statistics



Data from our last filing season (2015 tax year)



157M website visits and **20M** forms and publications downloaded, of which **23M** enquiries answered through agents and automated services.



84% individual returns filed online & **86%** corporation income tax returns filed online.



\$469B in taxes and duties processed and **\$255B** collected through source deductions.



31M individuals and businesses interacted with the CRA of which **\$52B** in outstanding tax debt resolved



\$22B paid to 12M benefit recipients, **135 benefit and credit programs** administered on behalf of provinces, territories and federal government.

Lessons learned

The good and the bad



1 Adopt a holistic business strategy

2 Relentless Incrementalism

3 It pays to compare

4 Don't need to lead the parade

5 Know your pain points



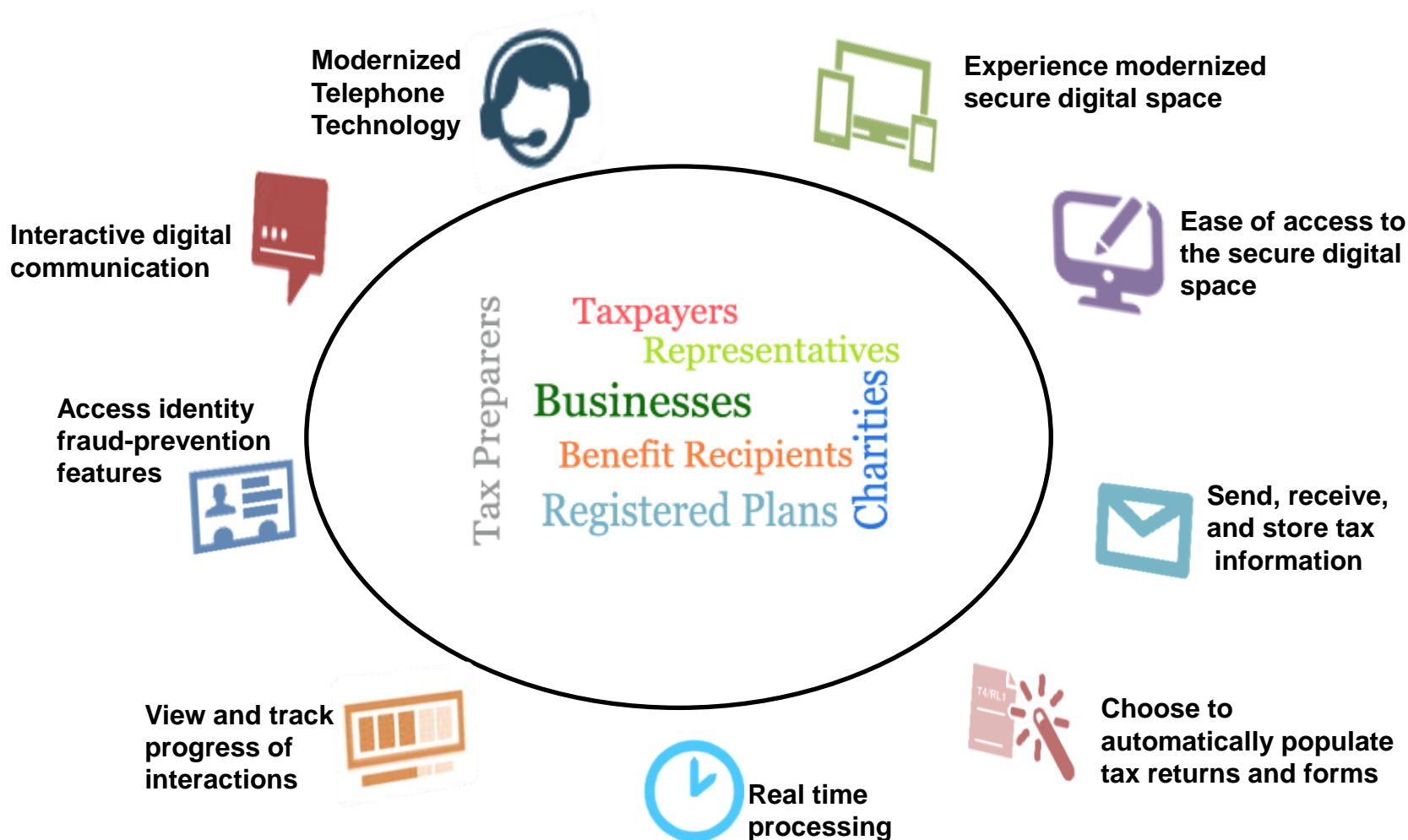
Our journey, moving forward

Simpler, faster and secure



e-Interactions – Our way forward

The e-Interactions Strategy is the CRA's commitment to identify ways to improve services to Canadians through the use of modern technology.



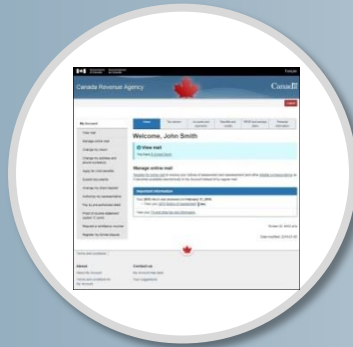
Experience modernized secure digital space

From 2015

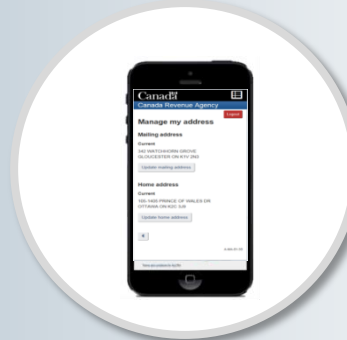
- ✓ Desktop only
- ✓ Basic portal
- ✓ Different user experience

To...

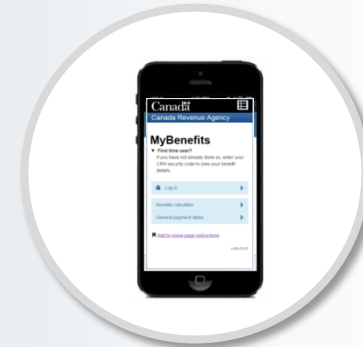
Portal modernization



MyCRA



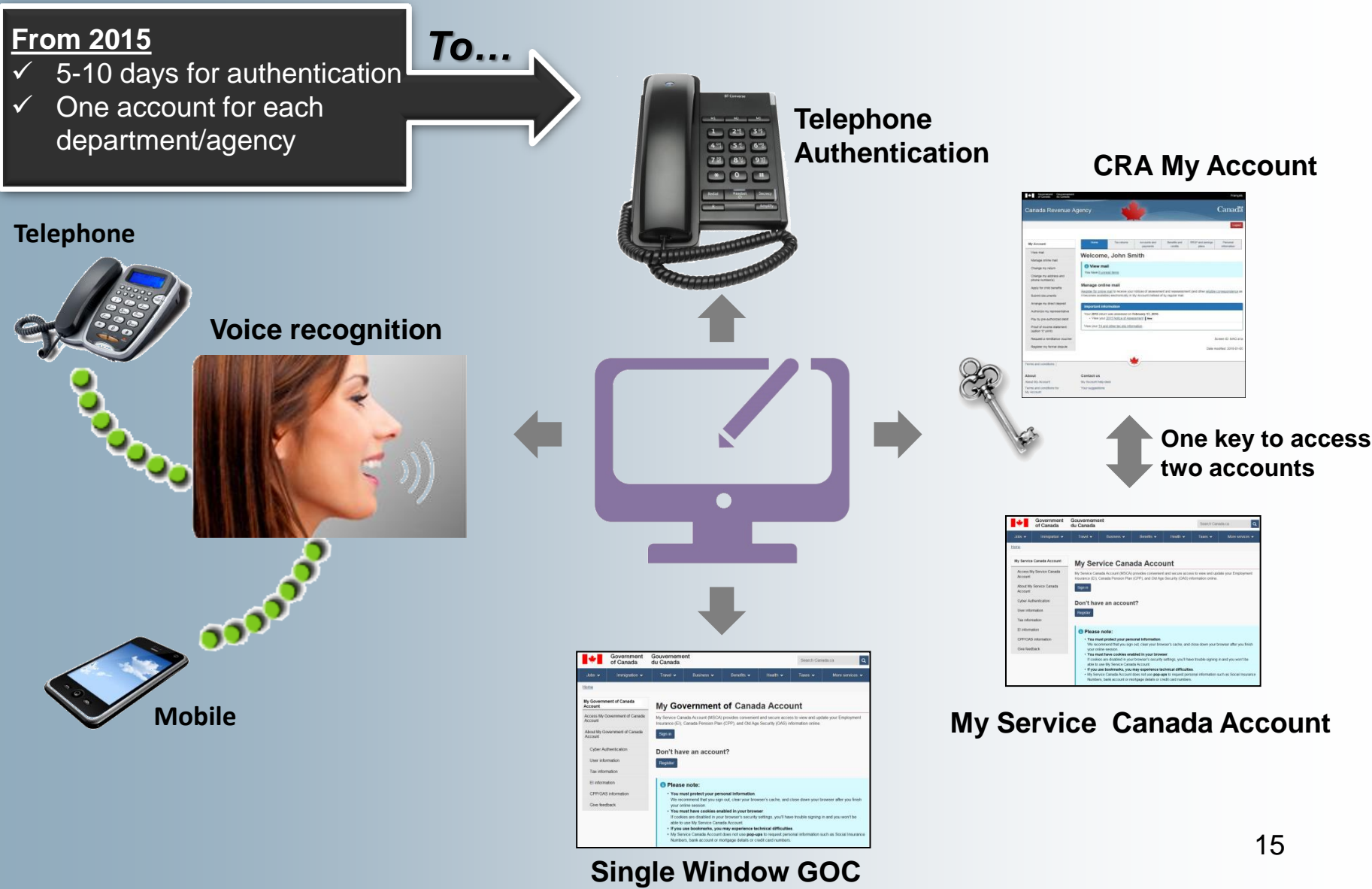
MyBenefits CRA



MyBusiness



Ease of access to the secure digital space



Send, receive, and store tax information

From 2015

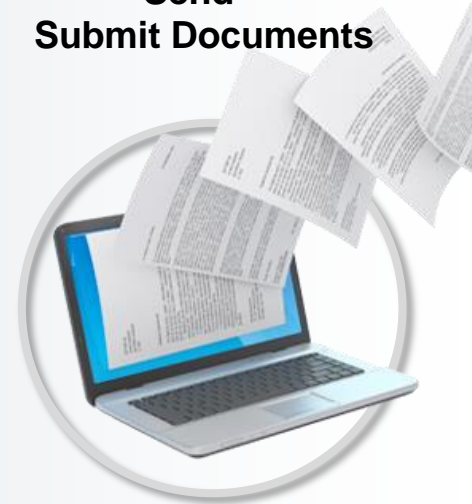
- ✓ 130 million pieces of outgoing mail
- ✓ Millions of incoming mail and faxes
- ✓ Storing paper receipts of all shapes and sizes

To...

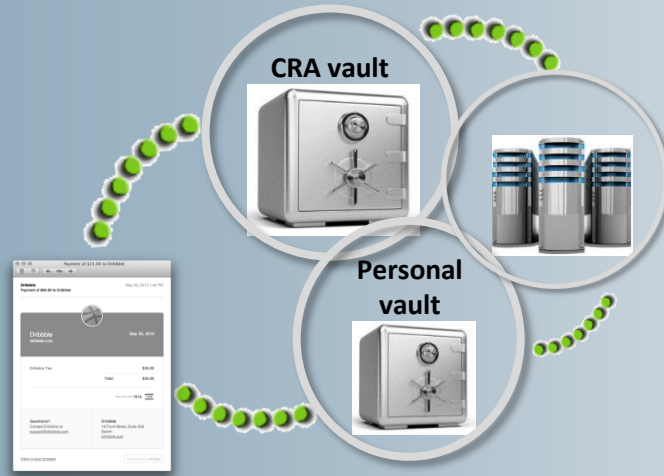


**Receive –
You've got mail!**

**Send –
Submit Documents**

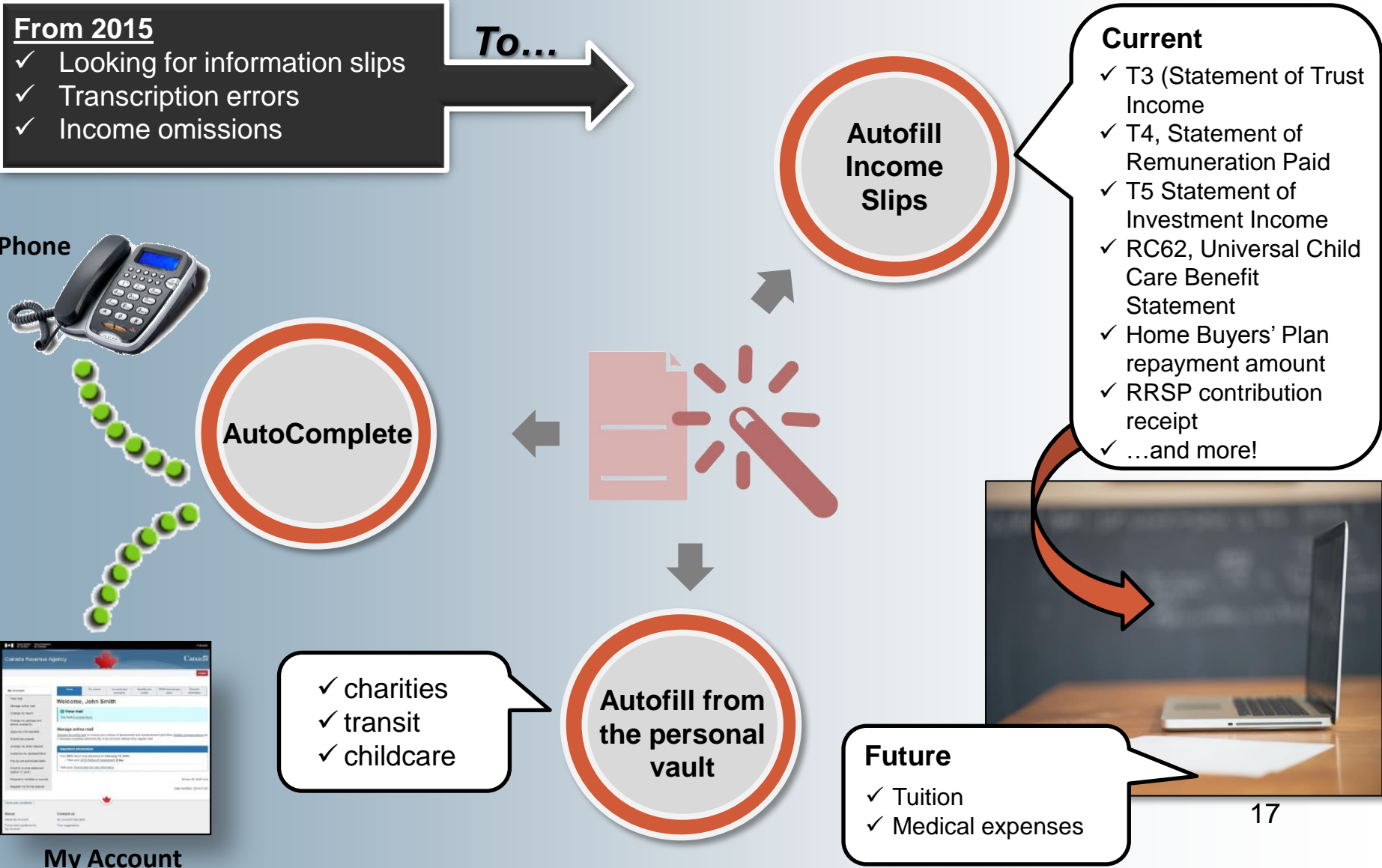


Store –



Standardized Electronic Receipts

Choose to automatically populate tax returns and forms



Real time processing

From 2015

- ✓ 6 weeks wait time for paper
- ✓ Taxpayers asked to submit documents months after filing
- ✓ Calling CRA for help



**"Your return has been processed;
Refund: \$747.52"**

Real Time Results



Real Time Support
- Tax preparers



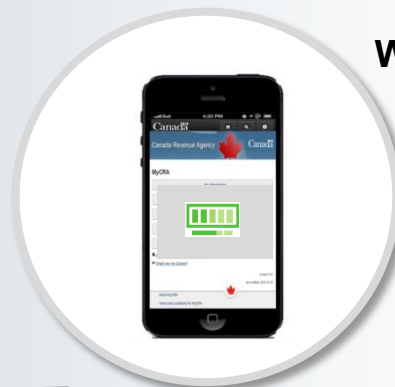
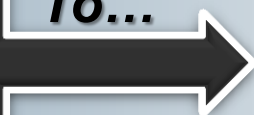
**Express
Notice of
Assessment**



View and track progress of interactions

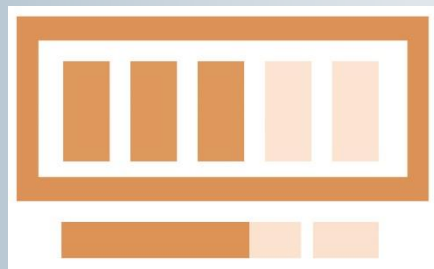
From 2015
✓ Calling CRA about status of return, where's my money?

To...



Where's my tax return?

Where's my Appeal?



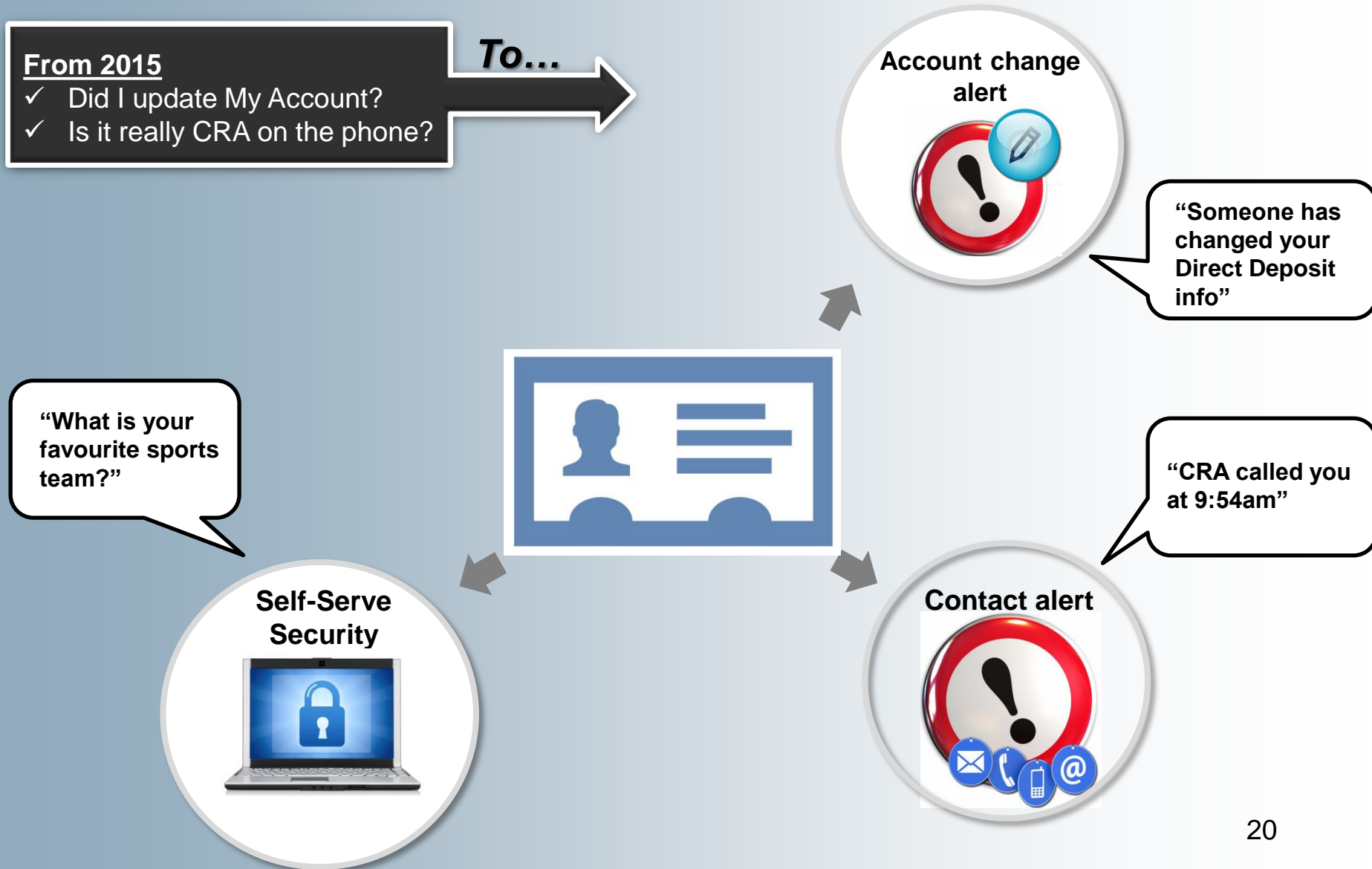
Where's my benefit?



Where's my Audit?



Access identity fraud-prevention features



Interactive digital communication

From 2015

- ✓ Unsecure email exchange
- ✓ Unsecure fax
- ✓ Cumbersome information exchange

To...



**Interactive secure
online chat**



My Audit



**Enhanced electronic
notification**



Modernized telephone technology

From 2015

- ✓ Can't find what I need
- ✓ Phones – Old technology
- ✓ Call someone else to get what need

To...



Our journey, moving forward

Enabling success through best practices





Thank you!