

## **PSSDC Information-Sharing Template – September 2018**

*Information Sharing was prepared for the PSSDC Meeting of September 2018 and not to be shared outside of the Council*

<b>JURISDICTION: Canada Revenue Agency (CRA)</b>		<b>Contact</b>
<p><b>1. Accomplishments:</b> Briefly highlight major service delivery accomplishments, progress, and/or significant milestones achieved in your jurisdiction over the past 6-12 months.</p>	<p><b>Making the tax filing experience easier</b> The <b>Auto-fill my return</b> secure service enables individuals, business owners and authorized representatives using certified software to automatically fill in parts of their return. Over 9.9M individuals and 76K business owners have filed their returns using the service this filing season until July 31, 2018. Canadians can use the <b>Express NOA</b> service to view their notice of assessment in their software right after filing, providing taxpayers with increased reassurance that their tax affairs are in order, thereby reducing the need to call. More than 415K notices were issued with the service this filing season. Launched in 2017, <b>ReFILE</b> is an online service that lets individuals and tax service preparers send online adjustments for income tax and benefit returns using certified software. Over 125K Canadians used the service this filing season. Historically, the CRA used to receive over 1M requests for adjustments which were mostly by paper. Since February 2018, eligible Canadians with low or fixed income can now file their return over the phone using the <b>File my Return</b> service by answering some simple questions with an automated service. 1M Canadians were invited to file this year, ensuring they receive the credits and benefits they are entitled to. The CRA is committed to serving Canadians better by making it easier to do their taxes, regardless of how they choose to file. This year, the Agency sent <b>guides and forms books</b> directly to the homes of approximately 2M clients who file on paper. This service facilitated client access to the forms they needed to meet their tax filing obligations.</p> <p><b>Outreach to vulnerable populations &amp; Community Volunteer Income Tax Program</b> The CRA developed a Strategy for Reaching and Supporting Vulnerable Canadians 2018-19 to 2020-21. This strategy will guide the implementation of the Community Volunteer Income Tax Program (CVITP) and the Outreach Program over the next three years and provide a framework that will guide the delivery of Federal Budget 2018 commitments to significantly increase the size of the CVITP, provide additional year-round tax and benefit clinics, and conduct more outreach activities to vulnerable population segments.</p> <p>CRA Outreach Officers conducted 1,383 outreach activities in 2017-2018. Close to 250,000 information products were distributed to over 73,000 outreach activity participants.</p> <p>In collaboration with Service Canada, the Outreach Program conducted 632 in-person visits to Indigenous communities between September 2016 and February 2018. These visits provided information on benefits and credits such as the Canada Child Benefit (CCB), the importance of tax filing to establish/maintain benefit and credit entitlement, and the CVITP.</p>	<p>Tessie Jokinen, Director General, Individual Returns Directorate (<i>Silvano Tocchi, PSSDC member</i>)</p> <p>Michael Honcoop, Director General, Horizontal Integration Directorate (<i>Silvano Tocchi, PSSDC member</i>)</p> <p>Karen Butcher, Director General, Benefit Programs Directorate (<i>Silvano Tocchi, PSSDC member</i>)</p>

	<p>The Outreach Program began a project to map the process of applying for and receiving the CCB from an Indigenous person's perspective. The goal of this journey mapping project is to better understand the barriers and challenges that negatively affect the client experience, and develop solutions to improve this experience and increase uptake of the benefit. Research visits to Indigenous communities began in June 2018.</p> <p>The CRA continues to support the expansion of the CVITP, which assists modest-income individuals with simple tax situations by completing their returns free of charge. This past year saw notable increases in many key CVITP metrics compared to the last year, including:</p> <ul style="list-style-type: none"> <li>• 9% increase in participating organizations (over 3,100)</li> <li>• 6.5% increase in volunteers (over 17,700)</li> <li>• 0.1% increase in the number of individuals helped (over 703,000)</li> <li>• 2.4% increase in the number of returns filed (over 786,000)</li> <li>• 27% increase in the number of Indigenous focused organizations participating in the CVITP (over 340)</li> </ul> <p><b>Reaching our call centre agents</b> Further to the findings of the fall 2017 report of the Auditor General on the CRA's call centres, we launched a three-point action plan focused on modernizing call centre technology, improving quality and accuracy through a new approach to call centre agent training, and updating service standards. We hired more agents and extended wait times in the agent queues, thus allowing more callers to reach our call centres rather than being faced with a busy signal. We reduced the number of call attempts needed to reach an agent from an average of 3.3 in 2015-2016 to an average of 2.1 in 2017-2018. The CRA's interactive voice response system was enhanced in February 2018 to add a new feature that allows callers to confirm their account balance and last payment details without needing to speak to an agent.</p> <p><b>Improving digital services</b> Using <b>Account Alerts</b> enables registrants to be notified when there has been a change to their address or direct deposit information or when mail has been returned to the CRA. They are now also notified when a representative has been added/deleted/modified on their secure account. Since its introduction in February 2017, the CRA's Account Alerts service has had over 904,000 Canadians register and over 1.1 million alerts issued via email. Of note, the address change alert is the most often triggered alert, with more than 553,000 email notifications issued as of June 2018.</p> <p>To continue building on the <b>Online mail</b> service, new correspondence was added including: Acknowledgement and response letters for the Appeals Service Complaints, and Cannabis Tax and Carbon Tax letters. Between February and July 2018, the CRA had over 1.3M new registrants. In response to comments from business clients, the account alerts and online mail services for businesses were combined and renamed to "<b>Notification Preferences</b>" to make managing their online mail easier.</p>	<p>Gillian Pranke, Director General, Call Centre Services Directorate (<i>Silvano Tocchi, PSSDC member</i>)</p> <p>Christopher Bowen, Director, Digital Projects Division (<i>Silvano Tocchi, PSSDC member</i>)</p>
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<p><b>2. <u>Priorities:</u></b> Briefly describe what your organization sees as its <b>top service delivery priorities/initiatives over the next 12 to 36 months.</b></p>	<p><b>Secure Portals Re-engineering Project</b> The Secure Portals Re-engineering (SPR) Project is a multi-year initiative that will transform the way the CRA provides digital service to Canadians. The current secure online portals - My Account, My Business Account and Represent a Client - will be merged into a single, modern, innovative and user-centric portal. Using User-Centric Design principles, the team applies the agile approach to design the service under the following four usability goals: easy to learn, easy to remember, easy to use and error tolerant.</p> <p>An early, public-facing deliverable of the project will be launched in October 2018 for My Account to make it easier for Canadians to find what they are looking for by re-designing, with user's input, the main functions of the portal so it is easier for Canadians to find what they are looking for.</p> <p><b>Digital Services Reboot</b> CRA is integrating client experience techniques into its analysis to update the Digital Services Roadmap. This includes engaging with clients to gather insights early in the design process and by exploring the client's journey from beginning to end. Client-centered design helps pinpoint the needs of the people who use the digital service and includes considering the client's behaviour. These insights will allow us to be more responsive to client needs and ensure that we are building digital services that meet their expectations.</p>	<p>Christopher Bowen, Director, Digital Projects Division (<i>Silvano Tocchi, PSSDC member</i>)</p> <p>Dawn Lawson, Director, Strategic Service Initiatives and Partnerships Division (<i>Silvano Tocchi, PSSDC member</i>)</p>

	<p><b>Death Registration and Notification</b>  CRA and ESDC continue to work together to facilitate solutions for data accuracy and review of conflicting policies to establish the trust factor.  The jurisdictions are reviewing the recommendations from the Client Journey Mapping report and defining elements for the development of the Bereavement Bundle.  The prototype of the Bereavement Bundle will take place in British Columbia. In the fall, a status update of the Bereavement Bundle will be presented to the clerks and Cabinet Secretaries.</p> <p><b>Business Number Adoption</b>  ISED continues in its outreach and engagement, and support role to OGDs for federal adoption of BN.</p> <ul style="list-style-type: none"> <li>• Prince Edward Island and Alberta will be adopting the BN using the BN Web Validation service and Authoritative source to create and update service solutions in the 2018/2019 fiscal.</li> <li>• Other provincial/territorial jurisdictions (Newfoundland, Northwest Territories, and Québec) have expressed interest in using the BN.</li> <li>• Consultations with provincial partners are still ongoing.</li> <li>• A new Authoritative Source Create and Update service was made available in October 2017. This includes a set of six services that allow provinces to request the creation of BN, and provide updates to certain corporation information, including legal and operating name, event information, owner information, and amalgamations.</li> </ul> <p><b>Direct Deposit and Address Information Sharing Initiative (DAISI)</b>  This multi-phase project will allow the CRA and Employment and Social Development Canada (ESDC) to share client's address and direct deposit information (consent based) thereby allowing clients to only tell us once when there has been a change.</p> <ul style="list-style-type: none"> <li>○ The first phase was introduced in November 2017 and includes sharing of direct deposit information for all CRA Social Insurance Number based programs and ESDC's Canada Pension Plan program. MyCRA mobile web application and NETFILE service channels were added.</li> <li>○ Future phases will build on the existing infrastructure to include the sharing of direct deposit and address information for all CRA Social Insurance Number based programs and ESDC's Canada Pension Plan and Old Age Security programs.</li> </ul> <p>The initiative is a pathfinder for Canada's Digital Interchange and streamlines updating of personal information between the two organizations.</p> <p><b>OneGC</b>  The CRA is co-chair with Treasury Board Secretariat on the OneGC council. The council's mandate is to drive change so Canadians can access any government program using the platform of their choice. A total of 13 individual clusters, led by core departments such as ESDC, IRCC, ISED, CBSA, VAC and TBS, were created with unique mandate. The clusters</p>	<p>Karen Butcher, Director General, Benefit Programs Directorate  <i>(Silvano Tocchi, PSSDC member)</i></p> <p>Vince Séguin, Director, Business Number (BN) Policy and Operations Division  <i>(Silvano Tocchi, PSSDC member)</i></p> <p>Christopher Bowen, Director, Digital Projects Division  <i>(Silvano Tocchi, PSSDC member)</i></p> <p>Silvano Tocchi, Director General, Digital Services Directorate <i>(PSSDC member)</i></p>
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	<p>will each look at various aspects of service, whether it is a technology enhancement such as the use of Application Programming Interface (API), policy and legislative considerations as well as client-centric design.</p> <p><b>Hosted Contact Centre Solution (HCCS)</b>  The CRA working in partnership with Shared Services Canada (SSC) and other government departments to evaluate and develop a new telephone platform, replacing our aged infrastructure that will connect Canadians with agents more efficiently. The new system is not yet in place, however the infrastructure that supports the Government of Canada's contact centres will be implemented in phases, which is expected in 2018-19.</p> <p>New performance indicators are being developed and will focus on client-centric indicators such as call accessibility and caller satisfaction. Indicators will be updated by the end of 2018-2019 based on the outcomes of service level pilots and a Public Opinion Research.</p> <p><b>Outreach to vulnerable populations &amp; Community Volunteer Income Tax Program</b>  In line with commitments in Budget 2018 and the Strategy for Reaching and Supporting Vulnerable Canadians, the Outreach Program will increase outreach activities to all vulnerable segments (Indigenous peoples, newcomers, seniors, youth, persons with disabilities, housing insecure individuals, and modest-income Canadians) by ten percent relative to 2017-2018 levels in 2018-2019. To support the increased outreach activities, the Outreach Program will develop more communication products to be distributed to individuals, some of which will be translated into Indigenous and third languages. The Outreach Program will also develop information products to share with third parties who support vulnerable populations, with the goals of increasing their capacity to provide accurate information about CRA programs and services and helping more individuals.</p> <p>The CVITP will continue to strengthen existing partnerships with community organizations and develop new partnerships. The CRA will work with these partners to expand the program's geographical coverage and to facilitate more clinics outside of the traditional tax filing season.</p>	<p>Gillian Pranke, Director General, Call Centre Services Directorate  <i>(Silvano Tocchi, PSSDC member)</i></p> <p>Karen Butcher, Director General, Benefits Directorate  <i>(Silvano Tocchi, PSSDC member)</i></p>
<p><b>3. Showcase/Sharing:</b>  Are there any resources in your jurisdiction such as applications, processes etc. that other jurisdictions may have an interest in applying or implementing in their own jurisdiction?  <i>(This information will help in agenda planning for future meetings.)</i></p>	<p><b>Verified.Me</b>  CRA is leveraging Public Services and Procurement Canada's (PSPC) Build in Canada Innovation Program (BCIP) to test a new service being developed by SecureKey Technologies called Verified.Me. The Verified.Me service would allow users to share attributes of their digital identity in a secure environment by obtaining verifiable information from banks, telecommunications companies ("Telco's"), as well as provincial/territorial governments. The CRA has entered into an Innovation Transfer and Evaluation Agreement (ITEA) with PSPC in order to proceed with the testing of this technology as a Proof of Concept (POC).</p>	<p>Micheline Leduc, Director, Digital and Operational Transformation Division  <i>(Silvano Tocchi, PSSDC member)</i></p>



	<p>At this time, the CRA is exploring three main use cases that can leverage Verified.Me for the purposes of the POC:</p> <ul style="list-style-type: none"> <li>• As an identity validation tool whereby registrants for CRA's online services could confirm their identity through the Verified.me service, thereby eliminating the need for a mailed or emailed CRA security code.</li> <li>• As a vehicle to fulfill income verification requests when 3rd parties (such as financial institutions) require information, such as a proof of income (Option 'C' print), from a taxpayer.</li> <li>• As a vehicle to update a taxpayer's Direct Deposit information at the CRA with information received from his or her financial institution using the province of British Columbia as an authoritative source for identity validation.</li> </ul> <p>All foundational work has been completed (implementation planning, requirements, meetings, wireframes and business flows). Infrastructure continues to be installed and preparation for testing the POC has begun.</p> <p><b>Online Mail</b>  With approximately 26% of Canadian taxpayers registered for online mail as of June 2018, we continue to identify ways to increase the number of people registered and expand the service to onboard new correspondence. This has resulted in Canadians getting access to their correspondence quickly and securely and it allows the CRA to offer the type of digital services that our clients expect. It has also allowed the CRA to reduce our paper usage and save on postage. CRA's online mail service has now delivered over 38 million pieces of correspondence to over 6.9 million taxpayers since the service was launched in 2015 until July 31, 2018.</p> <p><b>Correspondence</b>  The CRA simplified the correspondence it sends to Canadians, making it easier to read and understand, including new, simple, and easy-to-read notices of assessments for individuals and businesses. To date, 92% of the correspondence the CRA sends to Canadians has been transformed in this easy-to-read format. The CRA will have simplified virtually all correspondence by May 2019.</p> <p>The CRA is in the early stages of looking at a forms simplification project. The plan will be to apply the same methodologies and practices used in the correspondence simplification project while planning and implementing the forms project.</p>	<p>Micheline Leduc,  Director, Digital and Operational Transformation Division  <i>(Silvano Tocchi, PSSDC member)</i></p> <p>Michael Honcoop,  Director General, Horizontal Integration Directorate  <i>(Silvano Tocchi, PSSDC member)</i></p>
<p><b>4. Issues and Needs:</b>  Briefly describe any service delivery issues you would like to share with the Council and what</p>	<p><b><u>Outreach to vulnerable populations &amp; Community Volunteer Income Tax Program (CVITP)</u></b>  Budget 2018 calls on the CVITP to significantly increase the size of the program, provide additional year-round tax and benefit clinics, and calls for more outreach activities to vulnerable segments of the population. As such, the new funding will be used to increase</p>	<p>Karen Butcher, Director General, Benefits Directorate  <i>(Silvano Tocchi, PSSDC member)</i></p>

<p>assistance you might be seeking from PSSDC.</p>	<p>the number of individuals helped through the CVITP by 50 percent (to 1.05 million individuals) over the next five years to ensure that vulnerable individuals receive benefits and credits to which they are entitled.</p> <p>Beyond the initiatives funded through Budget 2018, the CRA announced that it will increase Outreach and CVITP services in the Territories, including Indigenous communities, through its Northern Service Improvement Strategy. Providing this enhanced in-person service is costly relative to the number of people helped. In this context, reaching the target of increasing the number of individuals helped to 1.05 million by 2023 will require a more targeted approach, including a renewed focus on urban centres. To these ends, the programs will balance their commitment to increase services to northern and remote communities with their commitment to help a higher number of vulnerable individuals through the CVITP.</p> <p>As this time assistance is not being sought from PSSDC.</p>	
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