

## PSSDC Information-Sharing Template – February 2018

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

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	<ul style="list-style-type: none"> <li>• New service implemented in October 2017 <ul style="list-style-type: none"> <li>○ CRA BizApp (a mobile application for small businesses).</li> <li>○ Auto-Fill for T2 returns (corporations will have the opportunity to automatically populate their T2 returns with data held by the CRA).</li> </ul> </li> <li>• New and enhanced services ready for implementation in February 2018 <ul style="list-style-type: none"> <li>○ Expanded Auto-Fill (individuals will have access to more tax information to complete their tax return automatically).</li> <li>○ File My Return (returns for low income Canadians with simple tax situations will be completed by the CRA for free, with their confirmation by telephone).</li> <li>○ Express Notice of Assessment (tax preparers and Canadians will receive their Notice in their tax preparation software within seconds of filing their tax return).</li> </ul> </li> </ul> <p><b>Accounts Alerts</b></p> <ul style="list-style-type: none"> <li>• Since its introduction in February 2017, the CRA's Account Alerts service has had over 700,000 Canadians register and almost 250,000 alerts issued via email.</li> </ul> <p><b>Online Mail Service</b></p> <ul style="list-style-type: none"> <li>• For online mail, between February and August 2017, the CRA: <ul style="list-style-type: none"> <li>○ Had nearly 1.6 million new registrants.</li> <li>○ Issued more than 10.5 million pieces of correspondence, including 3.9 million benefit-related correspondences in the month of July alone.</li> </ul> </li> </ul> <p><b>MyBenefits App</b></p> <ul style="list-style-type: none"> <li>• As of May 2017, a provincial breakdown of benefit and credit information was added to the app. This functionality was added to support CRA partnerships and allow users to easily identify contributing provincial benefit Pprograms.</li> </ul> <p><b>Outreach to vulnerable populations:</b>  The goal of the CRA Outreach program is to provide education on benefit and credit entitlements to vulnerable segments of the Canadian population to increase their participation in the tax and benefit system.</p> <p>The CRA proactively reaches out to various individuals to remind them of key dates and benefits through nudge letters. For example, in May 2017, CRA became aware that approximately 3,500 newcomers had not filed their tax return and were in danger of losing their benefits. Nudge letters were sent to these individuals, and 1,814 (52%) have since filed a return. In 2018, the CRA is planning nudge letters to new mothers who registered for the Automated Benefit Application but did not file a tax return, 19-year olds who may be eligible for the GST/HST tax credit, and seniors who are eligible for the CVITP and Guaranteed Income Supplement, and late-filers.</p>	<p>Micheline Leduc,  Director, Digital and  Operational  Transformation Division  (Silvano Tocchi, PSSDC  member)</p> <p>Christopher Bowen,  Director, Digital Projects  Division  (Silvano Tocchi, PSSDC  member)</p> <p>Brenda Watkins,  A/Director General,  Benefits Directorate  (Silvano Tocchi, PSSDC  member)</p>
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	<p>In addition, Service Canada and the CRA are collaborating, as part of a pilot, to increase awareness and uptake of the Canada Child Benefit and other benefits available to Indigenous people on-reserve and in Northern Communities.</p> <p>As of November 30, 2017:</p> <ul style="list-style-type: none"> <li>• 100% of communities engaged (698/698)</li> <li>• 618 communities visited (65 did not wish to receive outreach)</li> </ul> <p><b>Community Volunteer Income Tax Program:</b></p> <p>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 tax filing season, including:</p> <ul style="list-style-type: none"> <li>• 18% increase in participating organizations (over 2,800)</li> <li>• 11% increase in volunteers (over 16,500)</li> <li>• 1.5% increase in the number of individuals helped (over 702,500)</li> <li>• 2.5% increase in the number of returns filed (over 768,000)</li> <li>• Doubled number of CVITP community organizations holding clinics on reserves to 193</li> </ul>	<p>Brenda Watkins, A/Director General, Benefits Directorate (Silvano Tocchi, PSSDC member)</p>
<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>BN Adoption</b></p> <ul style="list-style-type: none"> <li>• PEI and Alberta will be adopting the BN using the Government of Canada (GC) solution in 2018.</li> <li>• Other provincial/territorial jurisdictions (Ontario, Newfoundland, Alberta and North West Territories) have expressed interest in using the GC solution.</li> <li>• Consultations with provincial partners are still ongoing.</li> <li>• A new Authoritative Source Creates and Updates service will be available to allow for update and delete functionality to the BN system as of October 2017.</li> <li>• Exploring future enhancements to the BN Web Validation service in collaboration with ISED.</li> </ul> <p><b>Digital Services Modernization Strategy</b></p> <ul style="list-style-type: none"> <li>• The CRA priorities remain focused on client-centricity, digital services, collaboration and partnerships, and value for money;</li> <li>• Client-driven design and delivery – meets client needs and preferences;</li> <li>• Easy online services – including paving the way for a GC single window, secure and simple;</li> <li>• Seamless delivery – integrated service channels, bundled service offerings, partner with other jurisdictions.</li> </ul>	<p>Vince Séguin, Director, Business Number (BN) Policy and Operations Division (Silvano Tocchi, PSSDC member)</p> <p>Micheline Leduc, Director, Digital and Operational Transformation Division (Silvano Tocchi, PSSDC member)</p>

	<p><b>Digital Mailroom</b></p> <ul style="list-style-type: none"> <li>• An Options Analysis is currently underway with the goal of recommending an Agency Digital Mailroom solution to senior management in March 2018.</li> <li>• The vision of the Digital Mailroom is to: <ul style="list-style-type: none"> <li>○ Scan incoming paper documents, faxes and electronic documents;</li> <li>○ Extract data from the documents based on business rules; and</li> <li>○ Send the data for processing and making the electronic images available for use in a central repository.</li> </ul> </li> </ul> <p><b>Secure Portal Engineering</b></p> <ul style="list-style-type: none"> <li>• Is a project to reengineer the infrastructure for the CRA's three secure online portals;</li> <li>• Includes creating a page within the portal where all identification and account information (e.g. address, marital status, representative, etc.) will be listed; and</li> <li>• Update the landing page to highlight the key sources of information for users.</li> </ul> <p><b>CRA BizApp</b></p> <ul style="list-style-type: none"> <li>• Released in October 2017, the CRA BizApp is a mobile web application for small business owners and sole proprietors. The app will offer secure access to view balances, accounting transactions and returns information. It will also include an integrated process for paying outstanding balances that aims to simplify the user experience and eliminate misallocated payments.</li> </ul> <p><b>Mobile Strategy</b></p> <ul style="list-style-type: none"> <li>• A mobile strategy is currently in development for the Agency, with the purpose to: <ul style="list-style-type: none"> <li>○ Set the strategic direction for the mobile service channel, and;</li> <li>○ Provide a foundation for evidence-based decisions pertaining to mobile services and products.</li> </ul> </li> </ul> <p><b>DAISI</b></p> <ul style="list-style-type: none"> <li>• This multi-phase project will allow the CRA and Employment and Social Development Canada 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. <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 the Canada Pension Plan program. Service enhancement are planned for February 2018.</li> </ul> </li> <li>• Pathfinder for Canada's Digital Interchange.</li> <li>• Streamlines updating of personal information between the two organizations.</li> </ul>	<p>Christopher Bowen, Director, Digital Projects Division (Silvano Tocchi, PSSDC member)</p>
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	<p><b>Outreach to vulnerable populations:</b> CRA will continue providing tailored outreach services to the following six vulnerable population segments to increase their participation in the tax and benefits system:</p> <ul style="list-style-type: none"> <li>• Indigenous peoples</li> <li>• Newcomers</li> <li>• Seniors</li> <li>• Youth</li> <li>• Persons with disabilities</li> <li>• Models-income Canadians</li> </ul> <p>Between now and 2018-2019, outreach efforts will focus on northern and remote communities to increase their tax and benefit filing capacity to ensure sustained uptake of the Canada Child Benefit and other benefits delivered through the tax system. This will be achieved through the ongoing Service Canada – CRA outreach partnership and the following initiatives:</p> <ul style="list-style-type: none"> <li>• Simplifying the Canada Child Benefit application process <ul style="list-style-type: none"> <li>○ CRA now accepts a letter from a band council to demonstrate a client's Canada Child Benefit eligibility</li> <li>○ CRA is developing a checklist and Q&amp;A document to assist in tax filing and benefit application</li> </ul> </li> <li>• Making it easier to file tax returns <ul style="list-style-type: none"> <li>○ CRA continues to work with communities to build internal CVITP capacity</li> <li>○ Expand the Automated Benefits Application to the Yukon and North West Territories (Fall 2017).</li> <li>○ Improve targeted outreach through the use of recent Indigenous Public Opinion research study results and linkage rate data based on the 2015 tax year and 2016 Census (Winter 2017).</li> <li>○ Implement the “File my return” pilot, where eligible taxpayers can have their returns completed over the phone by answering a few yes or no questions.</li> </ul> </li> <li>• Leveraging partnerships <ul style="list-style-type: none"> <li>○ Joint Outreach visits with Service Canada and Indigenous and Northern Affairs Canada.</li> <li>○ Statistics Canada improving their proxy for measuring tax filing and benefit uptake amount for Indigenous peoples (linkage rates).</li> <li>○ Liaising with key Indigenous organizations (i.e. Assembly of First Nations, National Association of Friendship Centres) for input on outreach efforts to Indigenous peoples.</li> </ul> </li> </ul>	<p>Brenda Watkins, A/Director General, Benefits Directorate (Silvano Tocchi, PSSDC member)</p>
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	<ul style="list-style-type: none"> <li>○ Liaising with key refugee organizations (i.e. Immigration, Refugees and Citizenship Canada, the Canadian Council for Refugees) for input on outreach efforts to newcomers.</li> <li>○ Working with Chartered Professional Accountants Canada to enhance participation in CVITP Clinics.</li> </ul> <p>CRA is also exploring new ways to engage with Indigenous communities and is working on an Indigenous webinar (planned for March 21), an Indigenous-focused digital advertising campaign (during the 2018 filing season), and a co-creation pilot project to involve Indigenous communities in the development of an outreach product tailored to Indigenous peoples (timing TBD).</p> <p><b>Community Volunteer Income Tax Program (CVITP):</b> 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>	Brenda Watkins, A/Director General, Benefits Directorate (Silvano Tocchi, PSSDC member)
<p><b>3. <u>Showcase/Sharing:</u></b> Are there <b>any resources in your jurisdiction such as applications, processes etc. that other jurisdictions may have an interest in applying or implementing</b> in their own jurisdiction? (This information will help in agenda planning for future meetings.)</p>	<p><b>Digital Services</b> <b>CRA and ESDC Collaboration</b></p> <ul style="list-style-type: none"> <li>• <b>Linked eAccounts</b> – Initiative introduced one year ago. Over 2 million clients have used the new link so far in our respective portals.</li> <li>• <b>“Tell-Us-Once” (DAISI)</b>– Clients can consent to share direct deposit information <ul style="list-style-type: none"> <li>○ Canada Pension Plan clients first (implemented in fall of 2017).</li> </ul> </li> <li>• <b>Access Code Harmonization</b> - the integration of the code issuance, to integrate authentication and credential management services for CRA and ESDC.</li> </ul> <p><b>Accounts Alerts</b> Canadians can sign up for account alerts to get an email from the Canada Revenue Agency whenever there's a change made to their address or to their direct deposit information. We'll also send an email if paper mail that we sent gets returned to us, so the client will know that there may be a need to update their mailing address.</p> <p>Offering the service to Business in May 2018. It will be combined with the online mail service.</p> <p><b>Online Mail</b> Continue to identify ways to expand the number of people registered for the service and to onboard new correspondence.</p> <p><b>Mobile Apps</b></p>	<p>Micheline Leduc, Director, Digital and Operational Transformation Division (Silvano Tocchi, PSSDC member)</p> <p>Christopher Bowen, Director, Digital Projects Division (Silvano Tocchi, PSSDC member)</p>

	Applying user-experience (UX) principles and the agile framework in the development of the mobile apps has allowed the CRA to implement an informed, effective and iterative design approach that focuses on user needs and behaviours.	
<b>4. <u>Issues and Needs:</u></b> Briefly describe <b>any service delivery issues you would like to share</b> with the Council and what assistance you might be seeking from PSSDC.	<p><b>Outreach to vulnerable populations:</b>  In-person outreach to remote and northern communities is resource-intensive and travel costs can be high.</p> <p>To that end, enhancing and strengthening partnerships with other federal departments (e.g. Service Canada, Indian and Northern Affairs Canada, Immigration and Refugee Board of Canada, and Health Canada) provincial and territorial governments' presence, Indigenous groups, and not-for-profit and professional associations is important to enhance reach and provide more government of Canada services to vulnerable Canadians. This also entails focussing on leveraging community organizations networks and boots on the ground for Outreach and CVITP services.</p> <p>Regarding the CVITP, early communications with organizations and providing them with the tools necessary to recruit their volunteers and hold tax filing clinics is key to the ongoing expansion and success of the CVITP.</p>	Brenda Watkins, A/Director General, Benefits Directorate (Silvano Tocchi, PSSDC member)