

## PSSDC Information-Sharing Template – January 2019

*Information Sharing is collected for the purpose of the PSSDC Meeting of February 2019.*

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JURISDICTION: Canada Revenue Agency (CRA)		Contact
<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><b>Making the tax filing experience easier</b></p> <p>The <b>Auto-fill my return</b> service enables individuals, business owners and authorized representatives using certified software to automatically fill in parts of their return. Over 10.3M individuals and 76K business owners have filed their returns using the service this filing season until December 31, 2018.</p> <p>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. By December 31, 2018, more than 434K notices were issued with the service.</p> <p>Launched in 2017, <b>ReFILE</b> lets individuals and tax preparers send online adjustments for income tax and benefit returns using certified software. Over 146K Canadians had used the service by December 31, 2018.</p> <p>In February 2018, eligible Canadians with low or fixed income were invited to file their return over the phone using the <b>File my Return</b> service by answering a series of questions through an automated service. Just under 1M Canadians were invited to use the service in 2018, ensuring they receive the credits and benefits they are entitled to.</p> <p>To serve Canadians better, as it did in 2018, the CRA will once again mail the Income tax package to 1.7M individuals who filed on paper the previous year. With this service, paper filers will have what they need to file their 2018 Income tax and benefit return. The new all-in-one tax package will include :</p> <ul style="list-style-type: none"> <li>• A letter from the Minister and Commissioner</li> <li>• A consolidated Federal Income Tax and Benefit Guide, the Provincial or Territorial Information Guide, with the income tax return and all federal and provincial (does not apply to Quebec) forms and schedules</li> <li>• Pre-addressed return envelope</li> </ul>	<p>Tessie Jokinen, Director General, Individual Returns Directorate (<i>Silvano Tocchi, PSSDC member</i>)</p>
	<p><b>Outreach to vulnerable populations &amp; Community Volunteer Income Tax Program (CVITP)</b></p> <p>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</p>	<p>Kathleen Butler, 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>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>The Outreach Program undertook 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 was 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. The research visits to Indigenous communities have concluded, the findings have been shared with stakeholders, and the project report is being finalised.</p> <p>Further to the Minister of National Revenue's August 2018 announcement, the three new Northern Service Centres in the territorial capitals of Whitehorse, Yellowknife and Iqaluit will open in February 2019. These service centres will improve the support offered to territorial residents, Indigenous communities, and businesses. In addition to maintaining a physical presence in the territories throughout the year, the CRA will expand outreach and CVITP activities in the territories, as well as, the Liaison Officer service offered to businesses and self-employed individuals.</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 previous 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>Hosted Contact Centre Service (HCCS)</b></p> <p>The new Hosted Contact Centre Service (HCCS) and the computer infrastructure that supports the Government of Canada's contact centres were successfully implemented for the CRA's telephone enquiries lines as of the following dates</p> <ul style="list-style-type: none"> <li>• Nov 13, 2018 – Business lines</li> </ul>	<p>Michael Honcoop, Director General, Call Centre Services Directorate (<i>Silvano Tocchi, PSSDC member</i>)</p>
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- Dec 3, 2018– Benefits lines
- Dec 10, 2018 – Individual Tax lines

We're already seeing service improvements with this new platform technology;

- Virtually all calls are making it to the queue (with no busy signals), however, wait times to get an agent continue to be long depending on the time of day.
- Callers now get an estimated wait times to speak with an agent, so that they can make an informed decision on whether to wait in the queue, call back later, or use self-serve options.
- Previously, callers would have to wait for an available agent at the call site they had reached. Now, calls are routed nationally to the next available agent across the country.

New performance standards will be identified in the 2018-2019 portfolio and will be published on the Canada.ca website by the end of the fiscal year.

## Improving digital services

In February 2019, the CRA will merge **Online mail** and **Account Alerts** and launch an improved email notification service. The new service notifies individuals and business via email when eligible correspondence is available to view electronically in one of the CRA's secure online portals or mobile web apps or when there are important changes made on an account such as an address change, a direct deposit update, or a representative has been added, deleted or changed.

The CRA continues to expand on the types of correspondence available electronically. A few recent additions include acknowledgement and response letters for Appeals Service Complaints, and Cannabis Tax and Carbon Tax letters. In total, over 21 million letters will be delivered electronically this year to the almost 8 million users enrolled in the service.

## Payments made easier

The CRA's electronic payment strategy focused on leveraging third parties in offering choice to Canadians. This has facilitated the introduction of several new electronic payment options, such as PayPal, e-transfer, AMEX, and China Union Pay. The CRA offerings such as Pre-authorized debit (PAD) and My Payment are now included in the new CRA BizApp for mobile users. Enhancements were also made to allow for additional garnishment payments via EDI (Electronic Data Interchange).

## Business Number Adoption

Following the project phase, the CRA continues in its service provider role to Innovation, Science and Economic Development (ISED) by providing Other Government Departments (OGDs) access to the Business Number (BN) Web Validation service. ISED continues in its outreach and engagement, and support role to OGDs for federal adoption of BN. The Treasury Board Secretariat (TBS) has produced a *Directive on the Business Number*, effective April 2018, which requires federal departments that have business facing programs

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	to be using the BN by April 2020. The number of federal departments using the BN Web Validation service has been increasing steadily since the rollout of this service in May 2017.	
<b>2. Priorities:</b> Briefly describe what your organization sees as its top service delivery priorities/initiatives over the next 12 to 36 months.	<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>A redesign of My Account was launched in October 2018 that allows users to quickly view their tax and benefit information and easily update their personal information with the CRA. By re-designing with users' input, SPR is providing a user-centered, task oriented portals and simplifying jargon and processes allowing users to find what they are looking for and complete their goals efficiently.</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><b>Death Registration and Notification</b>  CRA and Employment Services and Development Canada (ESDC) continue to work together to facilitate solutions for data accuracy and review of conflicting policies to establish the trust factor. A meeting/workshop with the provinces is set to take place at the end of January 2019.</p> <p><b>Business Number Adoption</b></p> <ul style="list-style-type: none"> <li>• ISED continues in its outreach and engagement, and support role to OGDs for federal adoption of BN.</li> <li>• As of fall 2017, British Columbia is subscribed to the owner update message from the Authoritative Source set of messages.</li> <li>• In 2018, Ontario started using the BN Web Validation service for a number of their business facing programs that were not already using the BN.</li> <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> </ul>	<p>Melanie Ringrose, 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>Karen Butcher, Director General, Benefit Programs Directorate  <i>(Silvano Tocchi, PSSDC member)</i></p> <p>Vince Séguin, Director, Business Number (BN) Division  <i>(Silvano Tocchi, PSSDC member)</i></p>

	<ul style="list-style-type: none"> <li>• Other provincial/territorial jurisdictions (Newfoundland, Northwest Territories, and Québec) have expressed interest in using the BN.</li> <li>• Consultations with provincial partners are ongoing.</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. The initiative is a pathfinder for the larger Government of Canada Tell-Us-Once Initiative.</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><b>OneGC</b>  The CRA is co-chair with Treasury Board Secretariat (TBS) 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, Immigration, Refugee and Citizenship Canada (IRCC), ISED, Canada Border Services Agency (CBSA), Veterans Affairs Canada (VAC) and TBS, were created with unique mandates. The clusters 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>The CRA is also participating in a use case that will see the BN Web Validation service API reside in the Government of Canada API Store (being led by ISED).</p> <p><b>Personal Identification Number (PIN) for telephone authentication</b>  The purpose of the Personal Identification Number (PIN) Authentication project is to simplify the confidentiality process for callers on the Individual and Benefit lines in order to make it easier for them to access the CRA's telephone service. In future, callers will enter their PIN to authenticate themselves through the call centres. This change will reduce call length for agent-assisted calls and improve the success rates for callers who are attempting to self-serve in our automated telephone services.</p> <p><b>Outreach to vulnerable populations &amp; Community Volunteer Income Tax Program (CVITP)</b></p>	<p>Melanie Ringrose,  Director, Digital Projects  Division  <i>(Silvano Tocchi, PSSDC member)</i></p> <p>Silvano Tocchi, Director  General, Digital Services  Directorate <i>(PSSDC member)</i></p> <p>Michael Honcoop,  Director General, Call  Centre Services  Directorate  <i>(Silvano Tocchi, PSSDC member)</i></p>
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	<p>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 and refugees, 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. Recognising the importance of third-party partnerships to both the Outreach Programs and the CVITP, the CRA established the Strategic Partnerships team to improve the efficiency and effectiveness of BPD partnership development efforts. The CRA will work with both new and existing partners to expand the Outreach Program and the CVITP's geographical coverage to reach more vulnerable Canadians, and to facilitate more clinics outside of the traditional tax filing season.</p>	<p>Karen Butcher, Director General, Benefits Directorate (<i>Silvano Tocchi, PSSDC member</i>)</p>
<p><b>3. Showcase/Sharing:</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? (<i>This information will help in agenda planning for future meetings.</i>)</p>	<p><b>Verified.Me</b> CRA has leveraged Public Services and Procurement Canada's (PSPC) Build in Canada Innovation Program (BCIP) to test a new service 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 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). The CRA has explored three main use cases that could 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 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> <li>• As a vehicle to fulfill income verification requests when third parties (such as financial institutions) require information, such as a proof of income (Option 'C' print), from a taxpayer.</li> </ul>	<p>Piero Urgolo, A/Director, Digital and Operational Transformation Division (<i>Silvano Tocchi, PSSDC member</i>)</p>

	<p>The POC testing and analysis was completed in October 2018. At the formation of the project, the CRA established objectives to frame evaluation of Verified.Me to determine its capability (utilizing the three use cases outlined above), to improve client experience, realize operational efficiencies, and extend reach to new clients – while ensuring that privacy, security, and legal concerns had been addressed. It was determined that the conduct of the project met those objectives.</p> <p>Analysis of the completed POC concluded that the innovation has the potential for streamlining existing CRA processes while providing a more real-time service model within the digital space for the three use cases analysed. In this regard, the CRA will review its strategy for expanded use of digital services and a more “end-to-end” digital service experience for taxpayers. We will also engage TBS to determine if and how this innovation aligns with the Government of Canada’s vision on digital identity management.</p> <p><b>Online Mail</b>  With approximately 26% of Canadian taxpayers registered for online, 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 8 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><b>Forms</b>  The CRA is in the early stages of a forms redesign project aimed at improving usability through the application of concise and simple terminology, simplified calculations, and improved logical structure and design.</p>	<p>Melanie Ringrose,  Director, Digital Projects  Division  <i>(Silvano Tocchi, PSSDC member)</i></p> <p>Kathleen Butler, Director  General, Horizontal  Integration Directorate  <i>(Silvano Tocchi, PSSDC member)</i></p>
<p><b>4. <u>Issues and Needs:</u></b>  Briefly describe any <b>service delivery issues you would like to share</b> with the Council and what assistance you might be seeking from PSSDC.</p>	<p><b>Outreach to vulnerable populations &amp; Community Volunteer Income Tax Program (CVITP)</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 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>Karen Butcher, Director  General, Benefits  Directorate  <i>(Silvano Tocchi, PSSDC member)</i></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>At this time assistance is not being sought from PSSDC.</p>	
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