

PSSDC Information-Sharing Template – September 2019

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JURISDICTION: Canada Revenue Agency (CRA)	Contact
<div data-bbox="107 274 422 548" data-label="Section-Header"> <p>1. Accomplishments: Briefly highlight major service delivery accomplishments, progress, and/or significant milestones achieved in your jurisdiction over the past 6-12 months.</p> </div> <div data-bbox="453 274 1646 1377" data-label="Text"> <p>Improving our Digital Services</p> <p>Digital Services Strategy and Roadmap In 2019, the CRA launched a new <i>Digital Services Strategy and Roadmap</i> that describes how the Agency will address the increasing integration of technology into its digital services delivery while also focusing on the needs and expectations of Canadians.</p> <p>The strategy and roadmap identify digital service priorities based on client needs and expectations gathered through detailed analysis and validation of client feedback. It also identifies infrastructure and organizational priorities necessary to deliver the easy, seamless digital service experience that Canadians expect from a world class tax service.</p> <p>Chatbots and voice-enabled technologies The CRA is exploring the use of new Artificial Intelligence (AI)-powered technologies such as chatbots and voice-activated devices (e.g., Google Assistant, Amazon's Alexa). When integrated with the CRA's existing service channels, these technologies have the potential to respond to Canadians demands for better, faster, easier communications with the CRA.</p> <p>The CRA launched its first cloud-hosted beta chatbot, Charlie, in March 2019. Charlie offers predefined responses to a variety of questions for the selected topic, and the initial results are promising. Charlie has answered over 40,000 questions since its initial launch, and feedback tells us that it anticipated the most common user questions. Building on this pilot, a series of trials are planned for 2019-2020, allowing for the incremental exploration into further integration of the technology and content with the existing digital services.</p> <p>Launch of a Beta Environment for External Users In July 2019, the CRA released its first-ever beta environment. This is a separate, controlled area of the production environment that allows the Agency to evaluate the responses of a selected user population to changes in design, interface or application.</p> <p>In this first instance, the users see a redesigned overview page for representatives. Users can explore, perform tasks and respond to a user feedback survey about the revised design. The CRA is tracking metrics including user opt ins, opt outs, and responses.</p> </div>	<div data-bbox="1671 274 1990 407" data-label="Text"> <p>Silvano Tocchi, Director General, Digital Services Directorate (PSSDC member)</p> </div>

	<p>Making the Tax Filing Experience Easier</p> <ul style="list-style-type: none"> • File my Return allows eligible Canadians with low or fixed income to file their return over the phone by answering a series of questions through an automated service. In 2019, 1.28M Canadians were invited to use the service, ensuring they receive their credits and benefits. • Direct mailing of new and improved income tax package to 1.7M individuals who filed on paper the previous year ensures paper filers will have what they need to file their 2019 income tax and benefit return, in a clear and easy-to-use format, and no one is left behind as digital services progress. • Auto-fill my return enables individuals, business owners and authorized representatives using certified software to automatically fill in parts of their return. During the 2019 tax filing season, over 11.6M individuals used the service. The CRA is continuing to improve this service with new types of information. • Express NOA lets individuals view their notice of assessment in their software right after filing. As of August 2019, more than 655K notices were viewed through the service. • ReFILE lets individuals and tax preparers send online adjustments for income tax and benefit returns using certified software. As of August 2019, over 254K individuals have used the service this year. 	<p>Robert Greene, Director General, Individual Returns Directorate (<i>Silvano Tocchi, PSSDC member</i>)</p>
<p>2. Priorities: Briefly describe what your organization sees as its top service delivery priorities/initiatives over the next 12 to 36 months.</p>	<p>Improving the Client Experience in our Digital Services</p> <p>Secure Portals Re-engineering (SPR) with User-Centric, Optimized Designs This project is a multi-year initiative that will merge the current secure online portals - My Account, My Business Account and Represent a Client - into a single, modern, innovative and user-centric portal. By applying user-centric design principles, the new single portal will be easy to learn, easy to remember, easy to use on any device and error tolerant.</p> <p>By including extensive user-testing through multiple iterations, user “tasks” are streamlined with simplified processes within the portals. For October 2019, the process of making a payment in both My Account and My Business Account will be integrated with viewing account balances, filing returns, and more. The My Business Account welcome page will be redesigned and will implement a business profile page that resembles the My Account profile page. May 2020 will see a redesigned process for submitting documents, followed by phase two of the payment task in October 2020.</p> <p>Progress Tracker Initiative The Progress Tracker will provide Canadians with a self-serve tracking service that mirrors the client’s journey from the point where their request is initiated to the point when a final response is delivered. The service will allow the user to know with confidence that their file has been received, that it is progressing and, ultimately, when it will be completed. It is anticipated the tracking service will be available within the secure portals by May 2021.</p>	<p>Silvano Tocchi, Director General, Digital Services Directorate (<i>PSSDC member</i>)</p>

	<p>OneGC The CRA is co-chair with Treasury Board of Canada 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. Separate clusters, led by core departments such as Employment and Social Development Canada (ESDC), Immigration, Refugee and Citizenship Canada (IRCC), Innovation, Science and Economic Development (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>BC Digital Identity for Federal Services The CRA, ESDC, and the Province of British Columbia (BC) are working together to provide Canadians who hold a BC Services Card (BCSC) with immediate digital access to the federal government services and programs offered through the CRA's My Account and ESDC's My Service Canada Account (MSCA). BC citizens will be able to use the same user ID and password from the BCSC to log in to their My Account and their My Service Canada Account. This will streamline the federal registration process for BC residents by relying on an approved provincial Trusted Digital Identity based on BC's conformance to the Pan-Canadian Trust Framework, instead of a federal credential and identity validation process. This initiative is an important step towards the creation of an ecosystem of digital identities that can be leveraged by all GC departments/agencies and other jurisdictions in Canada.</p> <p>Death Registration and Notification The CRA and ESDC are working together to facilitate solutions to streamline and simplify the current Death Notification process for Canadians.</p>	<p>Heather Daniels, Director General, Benefits Directorate <i>(Silvano Tocchi, PSSDC member)</i></p>
<p>3. Showcase/Sharing: 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>Verified.Me SecureKey Technologies' Verified.Me service allows users to share attributes of their digital identity in a secure environment by obtaining verifiable information from banks, telecommunications companies, and provincial/territorial governments. The CRA conducted a Proof of Concept with three use cases:</p> <ul style="list-style-type: none"> • 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. • As a vehicle to update a taxpayer's direct deposit information at the CRA with information received from their financial institution using the province of British Columbia as an authoritative source for identity validation. 	<p>Silvano Tocchi, Director General, Digital Services Directorate <i>(PSSDC member)</i></p>

	<ul style="list-style-type: none"> As a vehicle to fulfill income verification requests when third parties (such as financial institutions) require information from a taxpayer. <p>Verified.Me met the Agency's objectives to improve client experience, realize operational efficiencies, and extend reach to new clients while also ensuring that privacy, security, and legal concerns were addressed. The CRA will review its strategy for expanded use of digital services and a more "end-to-end" digital service experience for taxpayers as part of engaging with TBS to determine if and how this innovation aligns with the Government of Canada's vision on digital identity management.</p> <p>Email Notification Service This service merged two of CRA's previous services: Online Mail and Account Alerts. This new service now informs users when they have Online Mail to view in My Account or My Business Account, and alerts users when important changes are made on their account. Users who receive an alert, but have not authorized any changes, are advised to contact the CRA immediately, thereby increasing the security of their information.</p> <p>With approximately 26% of Canadians registered for email notifications, the CRA continues to identify ways to increase registrations as we onboard new correspondence. Online Mail has so far, allowed the CRA to reduce our paper usage and save on postage. As of July 31, 2019, our service has delivered over 63M pieces of correspondence to over 9 M taxpayers since the service was launched in 2015.</p>	
<p>4. <u>Issues and Needs:</u> Briefly describe any service delivery issues you would like to share with the Council and what assistance you might be seeking from PSSDC.</p>	<p>Business Intelligence (BI) / Client Feedback Data Analytics In 2017, the CRA launched client satisfaction surveys in each of its three secure online portals. As of July 31, 2019, we have received over 225,000 completed surveys and over 194,000 open text comments and suggestions from all three portals. These surveys are planned to continue for another two years (minimum) to allow us to track trends and to design and deliver new and improved digital services.</p> <p>We have prepared our first series of reports for each portal by manually reading and classifying the comments into client feedback themes. As this approach is not sustainable long-term, we are exploring methods to text-mine the data using various technologies and methods as the open comments do not naturally lend themselves to existing methods.</p> <p>At this time, the CRA is interested to learn from PSSDC members.</p>	<p>Silvano Tocchi, Director General, Digital Services Directorate (PSSDC member)</p>