

PSSDC Information-Sharing Template – February 2020

Information Sharing is collected for the purpose of the PSSDC Meeting of February 2020.

Information contained in this document cannot be shared without the approval of the member jurisdiction (author).

Jurisdictions are kindly requested to limit information sharing to a maximum of 3 pages.

Jurisdiction: Canada Revenue Agency (CRA)		Contact
1. <u>Priorities & Accomplishments:</u> <ul style="list-style-type: none"> Briefly describe what your jurisdiction sees as its top 2-3 service delivery priorities/initiatives over the next 6-12 months, and steps you intend to take to address these priorities. Briefly describe any significant service delivery accomplishment, progress, and/or milestone achieved in these priority areas over the last 6-12 months. 	PRIORITY 1: Improving the Client Experience in our <i>Digital Services</i>	Silvano Tocchi, Director General, Digital Services Directorate (PSSDC member)
	1a. Chatbots and voice-enabled technologies A second pilot will be launched in March 2020 to provide responses to the most common non-account-specific enquiries, based on those received by our call centres. The goal is to redirect potential callers to the self-serve digital channel and this pilot will allow us to measure the impacts of this new service channel on existing service channels,. We are also expanding our experimentation with this technology by incorporating an existing call back service on a few topics.	Heather Daniels, Director General, Benefit Programs Directorate (Silvano Tocchi, PSSDC member)
	1b. Disability Tax Credit – Digital Application A digital version of the Disability Tax Credit (DTC) application is expected in summer 2020. This modernized DTC application will provide a more streamlined approach for medical practitioners completing the form on behalf of their patients. More guidance will be included in areas that have long been considered ambiguous (e.g., “inordinate amount of time”, “substantially all of the time”, “marked vs. significant restrictions”). The Disability Tax Credit – Client Experience Survey has also been redesigned with anticipated release in spring 2020.	Anthony Boonstra, Director, Service Strategies and Design Division (Silvano Tocchi, PSSDC member)
	1c. Deceased Person’s Files Project The CRA is creating a CX Process Model and Toolkit for application across the Agency. A horizontal project team is piloting these tools by reviewing the process currently in place when a person passes away. The project team is working with impacted internal and external stakeholders, such as funeral home associations, to create draft personas and client journeys. These tools will be used to highlight pain points and identify service improvement opportunities.	Silvano Tocchi, Director General, Digital Services Directorate (PSSDC member)
	1d. Blockchain, data, digital ID Following the success of the Verified.me proof of concept, a pilot will be used to test the capability to send a taxpayers’ “Proof of Income” statement directly from the CRA to their financial institution when requested. This would provide the client with more service options. This pilot will determine if the technology meets the IT security, legal and privacy thresholds required to transmit taxpayer data, as well as estimate for effort and cost for full implementation.	Allen Pink, Director General, Digital Design and Production Directorate (Silvano Tocchi,

Feedback on these changes has been very positive. This is an early step in a multi-year project to redesign our online information and transform the way the CRA provides service to Canadians.

1f. Uncashed Cheques Initiative

In February 2020, the CRA will launch a new feature in My Account and the MyCRA app that will display all uncashed T1 refund and benefit cheques issued to individuals that are older than six months and dating back to 1998. There are approximately 7.6M uncashed cheques valued at \$1B.

The individual, or their representative(s), will have the ability to view and request a duplicate payment. If there is an amount owing with the CRA, part or all of the payment may be applied to the debt and any remaining amount will be issued as a new payment.

ACCOMPLISHMENTS in the last 6-12 months:

- Successful launch of the BC Digital Identity for Federal Services (February 2020)
- Simplified processes for authorizing a representative (Feb 2020)
- Successful POC with SecureKey Technologies' Verified.Me service. (December 2019)
- Launch of the CRA's first cloud-hosted beta chatbot, Charlie. (March 2019)

PRIORITY 2: Improving the Client Experience in our *Phone Services*

2a. Callback solutions

The CRA is exploring a callback solution to provide Canadians with an alternative to waiting on hold to speak with an agent. The goal is to connect clients with agents more efficiently, and to further enhance the caller's service experience. The solution is expected to be rolled out in Spring 2021.

2b. Call centre telework pilot

In October 2019, the CRA launched a pilot for call centre telework. With the migration to a HCCS, agents from six different call centres can now work from home. They have been fit-up with required equipment and amenities. Security, infrastructure, and human resources considerations were taken to ensure the safety of information and the support of agents. Performance and quality are being closely monitored, including ensuring comparable CX to the call centre. Agent well-being, such as isolationism, is also being monitored by management. Preliminary results have been very positive and are improving work-life balance.

ACCOMPLISHMENTS in the last 6-12 months:

- Redesign of the call centre agent tools, based on UX, for 3000 agents in 8 nation-wide call centres.

PSSDC member)

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 Director General,
 Horizontal
 Integration
 Directorate
 (Silvano Tocchi,
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Michael Honcoop,
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 Directorate
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	<p>PRIORITY 3: Improving the Client Experience in our Outreach</p> <p>3a. Indigenous Service Partnership with Service Canada Building on CX research, the CRA is conducting a pilot in collaboration with Service Canada to simplify the process to apply for the Canada Child Benefit for Indigenous populations. This pilot will include a simplified form as well as providing clients with in-person guidance. Planned for April 2020 in a number of First Nations communities in SK and NL.</p> <p>ACCOMPLISHMENTS in the last 6-12 months:</p> <ul style="list-style-type: none"> The CRA created client journey maps in collaboration with Service Canada, which sought to better understand the challenges that negatively affect the client experience of Indigenous individuals in accessing the CCB, and to develop solutions to improve this experience and increase uptake of the benefit. 	Heather Daniels, Director General, Benefit Programs Directorate (Silvano Tocchi, PSSDC member)
<p>2. <u>Showcase Opportunity:</u></p> <ul style="list-style-type: none"> List any significant deliverable(s), resource(s) or application(s) that you would like to present as a showcase item at an upcoming meeting or teleconference. Please provide a brief description of the item(s) to profile, time required and any other relevant information. 	<p>BC Digital Identity for Federal Services As of February 10, 2020, British Columbia (BC) residents can access their CRA My Account by using their BC Services Card. This new login option allows residents who hold a BC Services Card to immediately access the services offered through CRA's My Account. This service delivery initiative streamlines the federal My Account registration process for BC Services Card holders by relying on an approved provincial Trusted Digital Identity, based on BC's conformance to the Pan-Canadian Trust Framework. It removes the need for multiple logins and passwords, as well as removes the need for a letter in the mail or an email that provides the security code for online registration.</p>	Silvano Tocchi, Director General, Digital Services Directorate (PSSDC member)
<p>3. <u>Issues / Needs:</u></p> <ul style="list-style-type: none"> Briefly describe any service delivery issue(s) you are trying to solve that interjurisdictional collaboration can help to advance (e.g. pilot). If available, provide details on problem statement, project scope and targeted outcomes/deliverables. 	<p>To unlock Business Intelligence (BI) in Client Feedback Data</p> <p><u>Problem:</u> Efficient gathering of business intelligence from client feedback.</p> <p><u>Details:</u> The CRA has had client satisfaction surveys in each its secure online portals since 2017. As of October 31, 2019, we have received over 255,000 completed surveys and over 222,000 open text comments and suggestions. Some of the comments are less than a sentence, which the current software tools can't decipher for meaningful feedback. The same issue occurs with analyzing our social media feedback. These surveys allow us to track trends and to design and deliver new and improved digital services based on client feedback.</p> <p>We have prepared our first series of reports for each portal by <u>manually</u> reading and classifying the comments into client feedback themes. This approach is not sustainable long-term.</p> <p><u>Project Scope:</u> To explore methods to text-mine the data using various technologies and methods, as the open comments do not naturally lend themselves to existing methods. At this time, the CRA is interested to learn from PSSDC and Joint Council members.</p> <p><u>Targeted Outcomes:</u> To be able to efficiently gather business intelligence from our client feedback.</p>	Silvano Tocchi, Director General, Digital Services Directorate (PSSDC member)