

JURISDICTION: Canada Revenue Agency		Contact
1. Accomplishments: Briefly highlight major service delivery accomplishments, progress, and/or significant milestones achieved in your jurisdiction over the past 6-12 months.	Digital Services Modernization Strategy <ul style="list-style-type: none"> • The CRA has a comprehensive approach to modernizing its digital services that consists of two inter-linked elements. <ul style="list-style-type: none"> ○ Simplifying tax preparation and filing ○ Modernizing the secure online portal • New service ready for implementation in October 2017 <ul style="list-style-type: none"> ○ BizApp (a mobile application for small businesses). • New and enhanced services ready for implementation in February 2018 <ul style="list-style-type: none"> ○ Auto-Fill for T2 returns (corporations will have the opportunity to automatically populate their T2 returns with data held by the CRA). ○ Expanded Auto-Fill (individuals will have access to more tax information to complete their tax return automatically). ○ FileMyReturn (returns for low income Canadians with simple tax situations will be completed by the CRA for free, with their confirmation). ○ Express Notice of Assessment (tax preparers and Canadians will receive their Notice in their tax preparation software within seconds of filing their tax return). 	Micheline Leduc, Director, Digital and Operational Transformation Division <i>(Silvano Tocchi,</i> <i>PSSDC member)</i>
	Federal Adoption of Business Number (BN) Project <ul style="list-style-type: none"> • As a result of the 2015 and 2016 federal budget, the CRA and Innovation, Science and Economic Development Canada (ISED) are working towards the Government of Canada adoption of the Business Number (BN) for all business-facing programs by 2020. <ul style="list-style-type: none"> ○ The new Treasury Board Secretariat (TBS) policy on the Management of Information Technology (still in development) will require the use of the BN as a standard identifier for business interactions with the Government of Canada. ○ Terms of Use of being signed by Other Government Departments (OGD) to support the use and disclosure of the BN. Early Adopters include Employment and Social Development Canada (ESDC), Canadian Food Inspection Agency (CFIA), Environment and Client change Canada (ECCC) and Innovation, Science and Economic Development Canada (ISED) who have all signed the Terms of Use. ○ A cost agreement between ISED and CRA has been signed for the services provided by the CRA. • Consultations with the Privacy Commissioner and a Privacy Impact Assessment on the BN Web Validation Services were completed and approved. • May 2017: <ul style="list-style-type: none"> ○ The BN Web Validation Service was successfully launched and is available to all federal departments. ○ The Business Registration Online service is now available to support businesses who need to obtain a BN to interact with OGDs. 	Vince Séguin, Director, Business Number (BN) Policy and Operations Division <i>(Silvano Tocchi,</i> <i>PSSDC member)</i>

	<ul style="list-style-type: none">• Summer 2017:<ul style="list-style-type: none">◦ New Adopters including Natural Resources Canada (NRCAN), Veterans Affairs Canada (VAC), Agriculture and Agri-Food Canada (AFC), Statistics Canada (Stats Can) and Canadian Heritage have all signed the Terms of Use for the BN Web Validation service. <p>Accounts Alerts</p> <ul style="list-style-type: none">• Since its introduction in February 2017, the CRA’s Account Alerts service has had nearly 600,000 Canadians register and almost 250,000 alerts issued via email. <p>Online Mail Service</p> <ul style="list-style-type: none">• For online mail, between February and August 2017, the CRA:<ul style="list-style-type: none">◦ Had nearly 1.6 million new registrants for its online mail service.◦ Issued more than 10.5 million pieces of correspondence, including 3.9 million benefit-related correspondences in the month of July alone. <p>MyBenefits App</p> <ul style="list-style-type: none">• 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 programs. <p>Outreach to vulnerable populations:</p> <p>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>Between July 2016 and June 2017, the CRA issued more than 39.1 million Canada Child Benefit (CCB) payments totalling over \$24.6 billion. Over 3 million individuals currently receive the CCB.</p> <p>The CRA proactively reaches out to various individuals to remind them of key dates 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.</p> <p>In addition, Service Canada (SC) and the CRA are collaborating, as part of a pilot, to increase awareness and uptake of the CCB and other benefits available to Indigenous people on-reserve and in Northern Communities.</p> <p>As of July 31, 2017:</p> <ul style="list-style-type: none">• 100% of communities engaged (698/698)• 529 communities visited (60 did not wish to receive outreach) <p>Community Volunteer Income Tax Program (CVITP):</p> <p>CRA continues to support the expansion of the CVITP, which assists modest-income Canadians with simple</p>	<p>Christopher Bowen, Director, Digital Projects Division <i>(Silvano Tocchi, PSSDC member)</i></p> <p>Karen Hall, Director General, Benefits Directorate <i>(Silvano Tocchi, PSSDC member)</i></p>
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	<p>tax situations in completing their returns free of charge. The 2016 tax filing season saw notable increases in many key CVITP metrics compared to the last tax filing season, including:</p> <ul style="list-style-type: none"> • 18% increase in participating organizations (over 2,885) • 11% increase in volunteers (over 16,500) • 1.5% increase in the number of individuals helped (over 702,500) • 2.5% increase in the number of returns filed (over 765,000) • Doubled number of CVITP community organizations holding clinics on reserves to 193 	<p>Karen Hall, Director General, Benefits Directorate (Silvano Tocchi, PSSDC member)</p>
<p><u>2.Priorities:</u> Briefly describe what your organization sees as its top service delivery priorities/initiatives over the next 12 to 36 months.</p>	<p>Digital Services Modernization Strategy</p> <ul style="list-style-type: none"> • The CRA priorities remain focused on client-centricity, digital services, collaboration and partnerships, and value for money; • Client-driven design and delivery – meets client needs and preferences; • Easy online services – including paving the way for a GC single window, secure and simple; • Seamless delivery – integrated service channels, bundled service offerings, partner with other jurisdictions. <p>BN Adoption</p> <ul style="list-style-type: none"> • Fall 2017 deliverables: • PEI will be adopting the BN using the Government of Canada (GC) solution. • Other provincial/territorial jurisdictions (Ontario, Newfoundland, Alberta and North West Territories) have expressed interest in using the GC solution. • Consultations with provincial partners are still ongoing. • A new Authoritative Source Creates and Updates service will be available to allow for update and delete functionality to the BN system in October 2017. • Exploring future enhancements to the BN Web Validation service in collaboration with ISED. <p>Digital Mailroom</p> <ul style="list-style-type: none"> • An Options Analysis is currently underway with the goal of recommending an Agency Digital Mailroom solution to senior management in March 2018. • The vision of the Digital Mailroom is to: <ul style="list-style-type: none"> ○ Scan incoming paper documents, faxes and electronic documents; ○ Extract data from the documents based on business rules; and ○ Send the data for processing and making the electronic images available for use in a central repository. <p>Secure Portal Engineering</p> <ul style="list-style-type: none"> • Reengineer the infrastructure for the CRA's three secure portals • Create a page within the portal where all form of identification information and account information (e.g. address, marital status, representative, etc.) is listed • Update the landing page to highlight the key sources of information that our users look for 	<p>Micheline Leduc, Director, Digital and Operational Transformation Division (<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>

CRA BizApp

- Releasing 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.

Mobile Strategy

- A mobile strategy is currently in development for the Agency, with the purpose to:
 - Set the strategic direction for the mobile service channel, and;
 - Provide a foundation for evidence-based decisions pertaining to mobile services and products.

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- Addresses for CRA and Canada Pension Plan (CPP) + Old Age Security (OAS) & Direct Deposit for OAS (Feb 2019 and Employment Insurance (EI) (Feb 2020) between CRA and Employment and Social Development Canada (ESDC).
 - Sharing of direct deposit for all CRA Social Insurance Number (SIN) based programs and CPP being introduced in November 2017 and service enhancement for February 2018
- Pathfinder for Canada's Digital Interchange (CDI).
- Streamlines updating of personal information between the two organizations.

Outreach to vulnerable populations:

CRA will continue providing tailored outreach services to the following six vulnerable population segments to increase their participation in the tax and benefits system:

- Indigenous peoples
- Newcomers
- Seniors
- Youth
- Persons with disabilities
- Models-income Canadians

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 CCB and other benefits delivered through the tax system. This will be achieved through the ongoing Service Canada (SC) -CRA outreach partnership and the following initiatives:

- Simplifying the CCB application process
 - CRA now accepts a letter from a band council to demonstrate a client's CCB eligibility
 - CRA is developing a checklist and Q&A document to assist in tax
- Making it easier to file tax returns
 - CRA continues to work with communities to build internal CVITP capacity
 - Expand the Automated Benefits Application (ABA) to the Yukon and North West Territories (NWT) (Fall 2017).

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	<ul style="list-style-type: none">○ Improve targeted outreach through the use of recent Indigenous POR study results and linkage rate data based on the 2015 tax year and 2016 Census (Winter 2017).○ Implement the “File my return” pilot, which is one-step confirmation of information prepopulated by CRA to automatically file a simple tax return.● Leveraging partnerships<ul style="list-style-type: none">○ Joint Outreach visits with Service Canada and Indigenous and Northern Affairs Canada.○ Statistics Canada improving their proxy for measuring tax filing and benefit uptake amount for Indigenous peoples (linkage rates).○ Liaising with key Indigenous organizations (i.e. Assembly of First Nations, National Association of Friendship Centres) for input on outreach efforts to Indigenous peoples.○ Liaising with key refugee organizations (i.e. Immigration, Refugees and Citizenship Canada, the Canadian Council for Refugees) for input on outreach efforts to newcomers.○ Working with Chartered Professional Accountants (CPA) Canada to enhance participation in CVITP Clinics. <p>CRA will also launch a pilot project in Fall 2017 to partner with Indigenous communities to co-create outreach tools and awareness materials.</p> <p>Community Volunteer Income Tax Program (CVITP): 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>Karen Hall, Director General, Benefits Directorate (Silvano Tocchi, PSSDC member)</p>
<p><u>3.Showcase/Sharing:</u> 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>Digital Services Modernization Strategy GC Single Window – a single access to secure digital services federally</p> <ul style="list-style-type: none">● Linked eAccounts – CRA and ESDC Collaboration initiative introduced one year ago. Over 2 million clients have used the new link so far in our respective portals. <p>Access Code Harmonization - the integration of the code issuance, to integrate authentication and credential management services for CRA and ESDC.</p> <p>Accounts Alerts Sign up for account alerts to get an email from the Canada Revenue Agency (CRA) whenever there’s a change made to your address or to your direct deposit information. We’ll also send you an email if paper mail that we sent to you gets returned to us, so you’ll know that you may need to update your mailing address.</p> <p>Benefits of account alerts:</p> <ul style="list-style-type: none">● Don’t miss out on any payments – if the CRA sent you paper mail, such as a cheque, and it was returned to us, you’ll get an email● Stop worrying and stay protected – if you get an email for a change you didn’t make, you can report it as soon as it happens● Receive confirmation of your account changes – you’ll get an email as soon as we process your address or direct deposit change	<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>Offering the service to Business in May 2018. It will be combined with the online mail service.</p> <p>Online Mail Continue to identify ways to expand the number of people registered for the service and to onboard new correspondence.</p> <p>Mobile Apps</p> <ul style="list-style-type: none"> Applying user-experience (UX) principles and the Agile framework in the development of the mobile apps has allowed the CRA to implement and informed, effective and iterative design approach that focuses on user needs and behaviours. <p>Submit Documents</p>	<p>Christopher Bowen, Director, Digital Projects Division (<i>Silvano Tocchi, PSSDC member</i>)</p>
	<p>Build in Canada Innovation Program (BCIP): CRA is leveraging Public Services and Procurement Canada's (PSPC) Build in Canada Innovation Program (BCIP) to test the Verified.Me technology.</p> <p>Verified.Me is a new service being developed by SecureKey Technologies. The 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.</p> <p>The CRA is entering into an innovation transfer and evaluation agreement with PSPC in order to proceed with the testing of this technology.</p> <p>At this time, the CRA is exploring three main use cases that can leverage Verified.Me:</p> <ol 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 fulfill income verification requests when 3rd parties (such as financial institutions) require information (such as an "option C printout") from a taxpayer when applying for financial products. As a vehicle to update a taxpayers Direct Deposit information at the CRA with information received from the taxpayers' financial institution using the province of BC as an authoritative source. 	<p>Micheline Leduc, Director, Digital and Operational Transformation Division (<i>Silvano Tocchi, PSSDC member</i>)</p>

Briefly describe **any service delivery issues you would like to share** with the Council and what assistance you might be seeking from PSSDC.

In-person outreach to remote and northern communities is resource-intensive and travel costs can be high.

To that end, enhancing and strengthening partnerships with other federal departments (e.g. Service Canada (SC), Indian and Northern Affairs Canada (INAC), Immigration and Refugee Board of Canada (IRBC), 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 is also entails focussing on leveraging community organizations networks and boots on the ground for Outreach and CVITP services.

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.

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