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Canada Revenue Agency Meeting the Government of Canada's Service Mandate

**Qualitative and Quantitative Research Report
March 20th, 2017**

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1 Executive Summary

Introduction and Background

As the agency that administers tax laws and various social and economic benefit and incentive programs delivered through the tax system for the Government of Canada and for most provinces and territories, the Canada Revenue Agency (CRA) offers a wide array of services that have a direct impact on Canadians. As a result, one of the core stated objectives of the CRA is a commitment to contributing to the well-being of Canadians and the efficiency of government by delivering world-class tax and benefit administration that is responsive, effective, and trusted.

The November 2015 mandate letter to the Minister of National Revenue stated the following: "As Minister of National Revenue, your overarching goal will be to ensure that the CRA is fairer, more helpful, and easier to use."

To attain this goal, the Agency established a series of top priorities. One such core priority was to ensure that the CRA is a client-focused agency. Being a client-focused agency entails numerous elements, starting with two key items:

- Offer to complete returns for some clients, particularly lower-income Canadians and those on fixed incomes, whose financial situation is unchanged year-to-year;
- Support more Canadians who wish to file taxes using no paper forms.

In order for the CRA to effectively meet its service mandate, research was required to understand what clients expect from a new service offering.

Research Objectives

Quantitative and qualitative research with CRA clients was required in order to provide a clearer understanding of Canadians' needs with regards to their tax filings. CRA wanted to undertake this research to gain insight into the reasons why clients choose a filing method over another when completing their tax returns. This understanding is crucial considering the incredible speed at which Canadians' habits are changing with regards to online transactions and behaviours.

As stated in the November 2015 mandate letter, the CRA is also tasked with supporting more Canadians who wish to file taxes using no paper forms. To determine what needs to be done to improve its support, the CRA wanted to collect information regarding:

- How Canadians can be encouraged to file their taxes electronically;
- Potential barriers to filing electronically; and
- The types of services and filing options that could assist Canadians in making the transition to online filing.

Because the CRA wished to explore the possibility of providing some Canadians with a new tax-filing assistance service, it also needed this research to:

- Gauge client expectations regarding this new service;
- Identify specific elements with which they need assistance;

- Determine what type of assistance would make them likely to switch to a new tax filing approach;
- Identify the best contact method to inform about this new service; and
- Garner information on the potential barriers to using this new service.

Finally, this research was also used to test some of the proposed communication material prepared by the CRA with regards to the new tax filing assistance service. It was important to understand whether the material was clear, easy to understand for clients, and calling to action.

Overview of Methodology

This research was conducted in two phases:

- The **qualitative component of the research** took the form of eight, two-hour focus groups conducted in Halifax, Vancouver, London and Quebec City between November 29th and December 7th, 2016. Groups were held at 5:30pm and 7:30pm in all locations. All participants received \$90 in appreciation for their time and effort to attend in person, with the exception of participants in Quebec City who received \$75¹. A total of 72 participants were recruited over the phone from a list of telephone numbers provided by the Canada Revenue Agency and using a screening questionnaire, included in the appendix section. Of the 72 people recruited, a total of 58 attended the discussions. Telephone screening was used to ensure that one group was filled with paper filers while the other group contained a good mix of e-filers and netfilers. In all groups, participants were also screened to make sure they had an individual income of less than \$20,000 and were on fixed incomes so they would most likely be eligible for the new tax filing service assessed during the discussions. It should be noted that the qualitative findings cannot be generalized to a larger population, and that they should be considered directional only.
- The **quantitative portion of the research** was comprised of a telephone survey of 13 minutes on average among 1,259 respondents, conducted between November 14th to December 1st, 2016. Survey respondents were contacted at random using a list of telephone numbers provided by the Canada Revenue Agency. The target population was a subset of Canadian taxpayers, with quotas applied so that 50% of the sample were e-filers, 25% were netfilers and the final 25%, paper filers. While the lists used and the phone calls made were drawn randomly, results from this survey should not be deemed representative of the entire population of Canadian taxpayers since fixed quotas for tax filing methods and age groups were applied in drawing the list and in making phone calls. This was done to maximise the likelihood that respondents would match the target audience for the new tax filing service. As such, no margin of error can be applied to this research. The data were weighted to reflect the age, gender and filing method of the target population of taxpayers using statistics provided by the Canada Revenue Agency. Where figures do not sum to 100, this is due to the effects of rounding.

¹ The original incentive was \$75 but due to difficulties in recruiting participants, the incentive was increased to \$90 part-way through recruitment.

This Report

This report contains the findings from both the quantitative telephone survey and the qualitative focus group sessions.

Key Findings

1.1.1 Barriers to Switching to Electronic Filing

When those identified as paper filers in the survey were asked whether they would be open to changing to electronic filing in the future, results were mixed. One-in-seven (15%) paper filers stated that they would be very open to changing, with another quarter (25%) saying they would be somewhat open to the idea. A significant amount of resistance remained, with a full 36% saying they would be very reluctant and another 23% mentioning they were somewhat reluctant.

The main barriers to switching to electronic filing include simply being used to filing taxes on paper (60% ranked as major reason), followed by enjoying submitting them on paper (52% major reason) and the desire to “keep control” of what is included in their tax return (50% major reason).

These three most common reasons listed in the survey component were followed by security concerns at the idea of sharing their personal information over the Internet (43% major reason), lack of comfort using computers or the Internet (37%), worries about losing the information they entered (36%), the cost of the software needed (33%) and concerns over the possibility of making a mistake or skipping important information (32% major reason). Having no or limited access to the Internet at home (28%), not knowing where to find the relevant information regarding electronic filing (25%) and concerns over the possibility that one may not be able to take advantage of all the benefits and deductions available (23%) remained important factors, even if they only applied to a minority of individuals.

Focus group discussions provided a deeper understanding of these numbers. Many paper filers across all locations stated that they were very comfortable filing their taxes on paper, often because this is what they had always done and did not see a need to change. For some it simply felt good, or reassuring, to have a paper copy in front of them and to be able to send one copy while keeping the other in their files at home. The need to keep personal control over the process was also raised across locations, with some feeling they would lose this control if using a computer to file over the Internet. Many paper filers also expressed strong reservations at the idea of sharing their personal data over the Internet due to security concerns or lack of computer literacy. This overall reluctance to switch to electronic filing was particularly strong among older participants with long-standing experience filing their taxes on their own.

1.1.2 Interest in the New Tax Filing Service

Survey respondents and focus group participants alike expressed a high degree of interest in the new tax filing service that was presented to them. After having been read a description of the new service, 62% of survey respondents said they would be very (30%) or somewhat (32%) interested in switching to this new service. Similar results were obtained in focus groups, where the vast majority of participants expressed interest in at least knowing more about the new service when provided with the invitation letter that describes the service and who would be eligible for it.

While those who currently use netfiling were most likely to be interested in the new service (75% interested), paper filers were also highly interested (65%). Paper filers who also mentioned earlier in the survey that they were open to filing electronically in the future were much more likely to report being interested in this new service (85%) compared to those who said they would be reluctant to use electronic filing (51%). This result was also observed in focus groups, with participants who felt uncomfortable with computers or who worried about the safety in Internet transactions being less interested in this service offering. This reluctance was more noticeable among older individuals.

Both survey respondents and focus group participants expressed a preference for using the online version of the new service as opposed to the phone version. However, focus groups also showed that it was deemed essential to offer a phone option to serve Canadians who did not have access to the Internet at home or faced challenges using a computer, especially people with disabilities.

Those who did not react very positively to the invitation letter mostly raised concerns over their eligibility to use the service, even though recruiting requirements and discussions regarding their personal financial situation seemed to indicate that they were eligible. This lack of understanding regarding eligibility requirements was consistent across all locations and in both paper filers and electronic filers groups. It also resurfaced during the discussions on the online and phone demonstrations shown to participants.

One of the concerns raised pertained to disability payments, which many participants felt may not be included as part of this service. Another point of contention raised in all locations was whether it would be possible for service users to claim medical expenses. Many participants felt that unless they were able to claim such expenses while filing their return, they would end up losing money on a yearly basis. Similar concerns were raised for multiple types of deductions, including charitable donations, provincial benefits, etc. Some participants also spontaneously questioned whether this service could apply to couples, as they felt it more likely applied to people living on their own.

1.1.3 Focus Group Assessment of the New Service

Focus group participants were shown an online demo version of the *File my return* (name of the service as used for the demonstration) service and a paper form describing the content of the phone call one would have to go through to file using the phone option.

Setting aside previously mentioned comments regarding eligibility, reactions to the online demonstration were very positive, while the phone option generated mixed reviews, even if deemed essential. Many participants were very impressed with the simplicity of the online procedure and felt it looked easy to do compared to what they had experienced in the past, whether they were paper filers or netfilers. Upon seeing how the service worked on screen, the vast majority of participants said they felt reassured about its safety.

Most participants agreed that it would be nice, for some even essential, to see a completed version of their tax return before clicking on the "submit" button. They wanted to see the final product on screen, with many of them also wanting to print a hard copy for their record, before they sent it in. It provided a

sense of security should a problem arise with their computers or with the information they had entered on the website.

Reactions to the phone version were mixed. While participants unanimously agreed that it was necessary to provide a phone option for those without access to a computer and persons with disabilities, most also said they would not use it themselves. Contrary to the online option, which was seen as very simple and fast, the phone version was mostly seen to take much longer to fill out and as being more complex in general.

Many participants expressed doubts that they could understand and answer properly all questions over the phone and were concerned about making mistakes or not hearing some of the instructions properly. Having to use an automated phone system rather than talking to a live person to fill out the information generated mainly negative reactions, although a few participants felt it was better because it reduced the possibility of human error at the other end of the line and would allow them to call at any time of day and night.

The few participants who remained reluctant to agree they would use this service, in either its online or phone versions, cited two main reasons: they already had assistance that worked well for them or they felt that they did not have sufficient financial literacy or proficiency with computers to do this by themselves. A handful of paper filers said they would stick with paper filing because they simply did not trust computers or the Internet to treat this information safely.

Additional Information

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2 Detailed Findings

The analysis presented in this report is derived from both qualitative and quantitative phases of research. For clarity and simplicity, the report is mostly constructed around quantitative survey results, with qualitative findings included where relevant. The final sections of the report focus on the qualitative assessment of the online and phone demos, as well as the name of the new tax filing service.

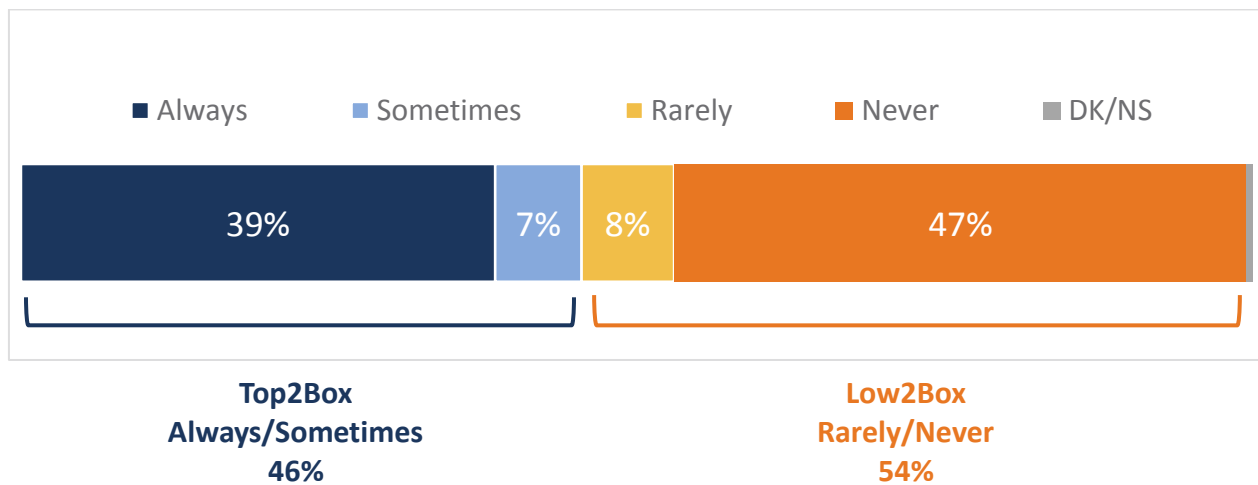
2.1 Tax Preparation and Filing Process

2.1.1 Individual vs Assisted Preparation

Considering that one of the core objectives of the research was to gauge individual openness to using a new tax filing service, it was important to assess the extent to which targeted taxpayers were comfortable doing their taxes and open to trying new approaches. As such, a key question pertained to whether they had some previous experience in preparing their taxes on their own regardless of how they proceeded in 2015.

As shown below, respondents were divided on this question, with 46% saying they either always (39%) or sometimes (7%) prepared their taxes on their own and 54% stating they rarely or never did so on their own. Not surprisingly, e-filers (15%) were much less likely than Netfilers (84%) or Paper filers (81%) to report having past experience in preparing their taxes on their own. In fact, a full 74% of e-Filers stated that they have never prepared their taxes on their own.

FIGURE 1: Habitual Approach to Tax Preparation

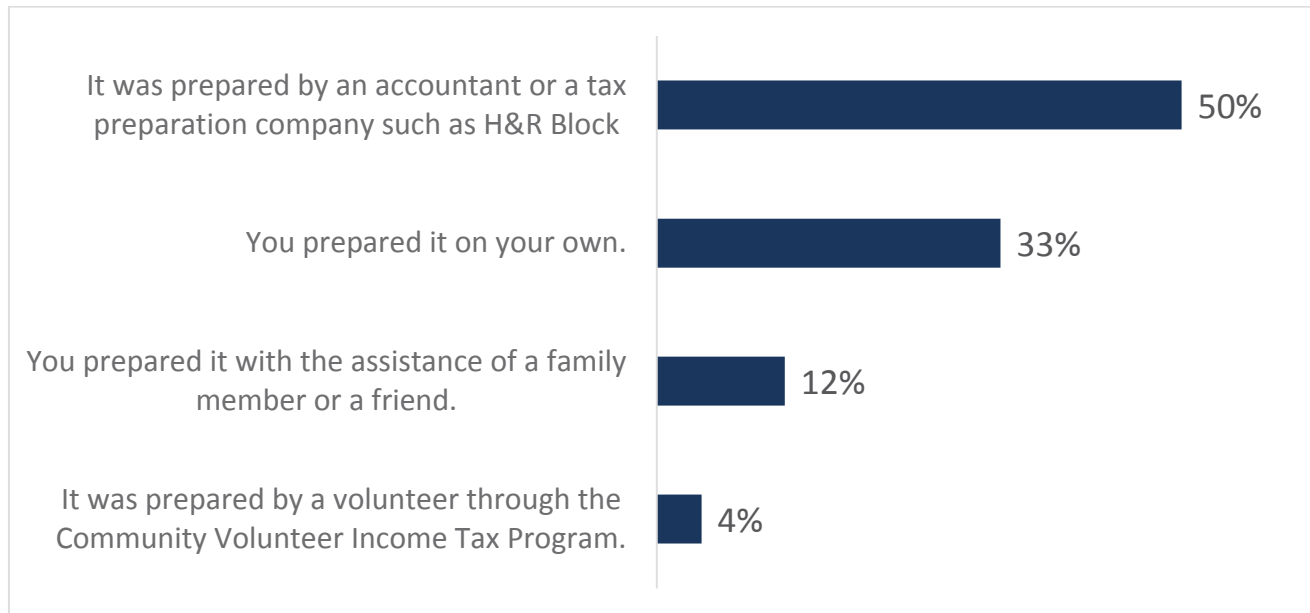


Q1. Canadians can either prepare their income taxes on their own, they can get assistance from family and friends or they can hire an accountant or a tax preparation company such as H&R Block. How frequently would you say you prepare your tax return on your own? Base: All Respondents (n=1,259)

Beyond their past levels of experience with tax preparation in general, respondents were asked how they prepared their 2015 tax return. In line with the sample drawn for this research, half of those sampled filed their taxes with the help of an accountant or tax preparation company. For the remainder of this report, this group will be referred to as e-filers.

Another third (33%) of the sample stated that they prepared their tax return on their own, while 12% prepared it with the assistance of a family member or a friend and finally, 4% used the services of a volunteer through the Community Volunteer Income Tax Program.

FIGURE 2: Use of Assistance in Tax Preparation in 2015



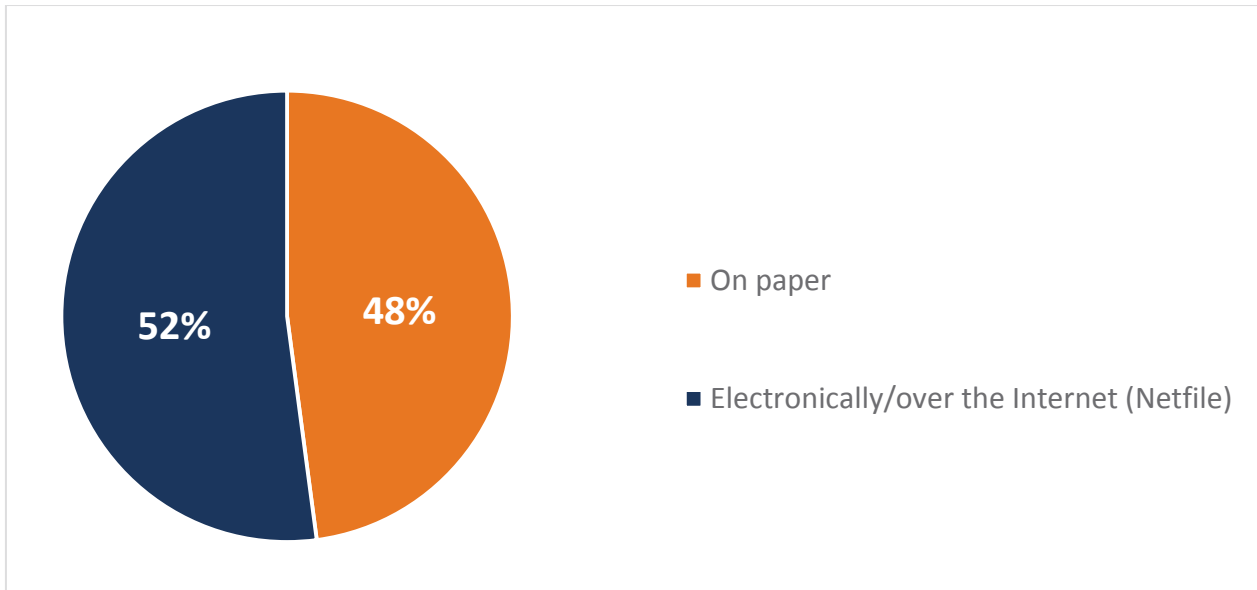
Q2A. Which of the following best represents how your 2015 income tax return was prepared?
Base: All Respondents (n=1,259)

Respondents who are self-employed (83%) were more likely to have used the services of an accountant or a tax preparation company. On the other hand, those who are retired (34%) or not in the workforce (41%) were more likely to have prepared their taxes on their own.

2.1.2 Paper vs Electronic Filing

Respondents who did not use the services of an accountant or a tax preparation company were asked whether they filed their 2015 income tax return on paper or electronically. In line with the objectives of the research, this subset of taxpayers was evenly split, with 48% of respondents having filed their taxes on paper and 52% having filed them electronically.

FIGURE 3: Tax Filing Method for 2015



Q.2.B. How was your income tax return submitted last year? Was it submitted on paper, or was it submitted electronically over the Internet (if necessary, specify: using Netfile)?

Base: Prepared it on their own or with assistance (n=631)

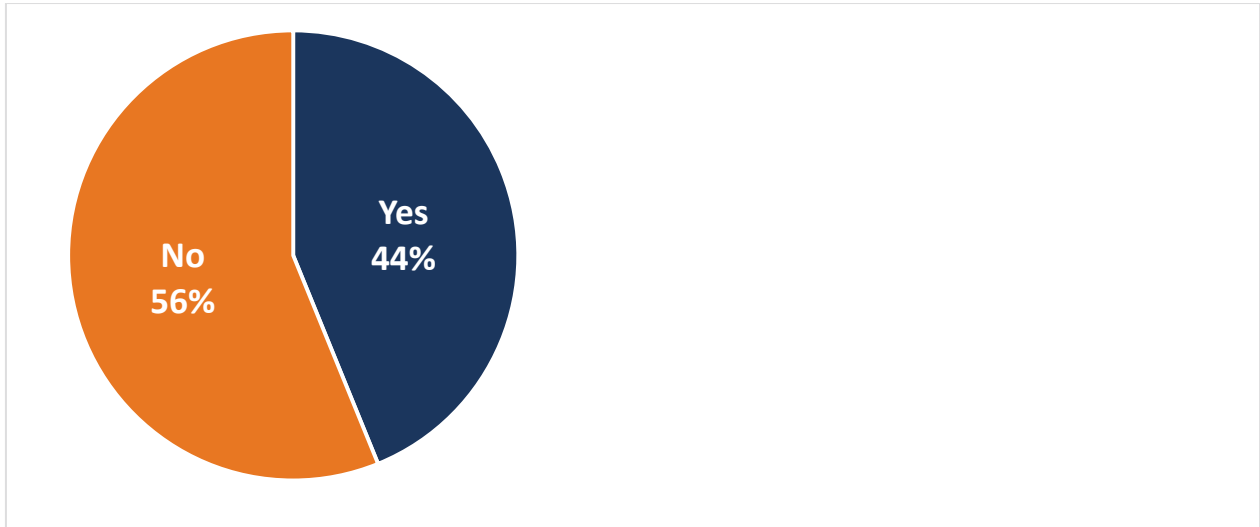
Those aged 65 years and older (61%) were much more likely to have filed their taxes on paper than any other age groups (39% on average for other age groups). In line with this finding, retired individuals (55%) and those not in the workforce (55%) were most likely to have filed on paper. Propensity to file on paper is also closely related to Internet usage in general, with those who said they use the Internet every day (65%) being much more likely to have filed electronically compared to those who use it a few times a week (27%), once a week or less than once a week (26%) or those who never use the Internet (17%).

A very large income gap is also apparent between those who have filed on paper and those who have filed electronically. Indeed, only 38% of those with household incomes of less than \$20,000 and 41% of those with household incomes between \$20,000 and less than \$40,000 have filed their taxes electronically, compared to 72% on average for those with an income of more than \$40,000. Respondents with a university degree (59%) were also more likely to have filed electronically than those with a high school education or less (47%).

To gauge the extent to which paper filers or Netfilers were open to using other approaches, they were also asked whether they had previously used the services of an accountant or tax preparation company. More than four-in-ten (44%) had indeed tried this option in the past, demonstrating a willingness to use other options available.



FIGURE 4: Prior Use of Accountant or Tax Preparation Company



Q3. Have you ever used the services of an accountant or a tax preparation service such as H&R Block?
Base: Prepared it on their own or with assistance (n=631)

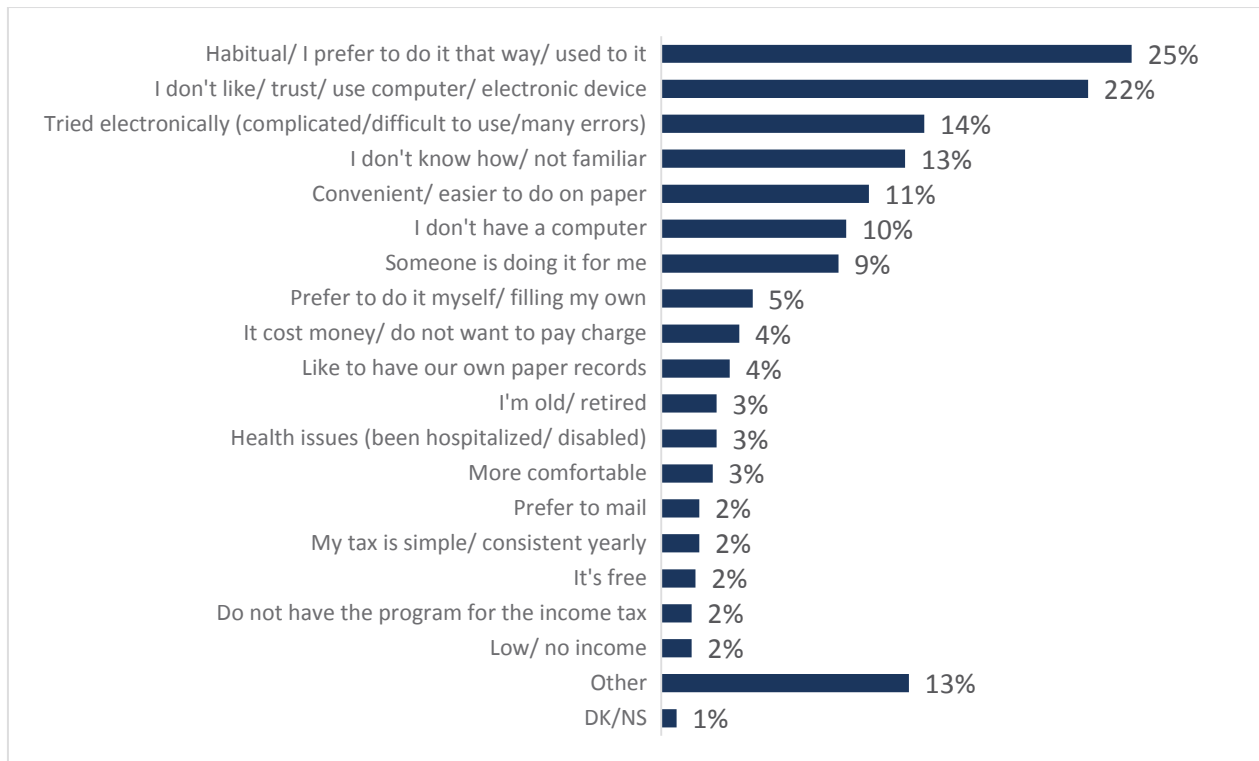
Quebec respondents (31%) were less likely than those of other provinces to say they have used the services of an accountant or a tax preparation company in the past. Individuals aged 65 years and older (36%), as well as men (36% compared to 51% for women) were also less likely to have used these services in the past.

2.2 Paper Filers

2.2.1 Reasons for Preferring Paper over Electronic Filing

Paper filers were asked in an open-ended question to provide the main reasons why they filed their taxes in this manner rather than doing it electronically. The two most important reasons provided closely match what was heard on an unprompted basis during the focus group sessions as well: it is a matter of habit (25%) and they don't trust or don't feel comfortable using computers (22%). Those two answers are also directly related to other reasons provided, such as failed or difficult past experience (14%), lack of familiarity or know-how (13%), convenience of using paper (11%), not having a computer at home (10%), or just a preference for doing everything themselves (5%). The cost of using other methods was also raised, either as a direct barrier (4%) or through stating that paper is free (2%).

FIGURE 5: Top-of-Mind Reasons for Filing Taxes on Paper



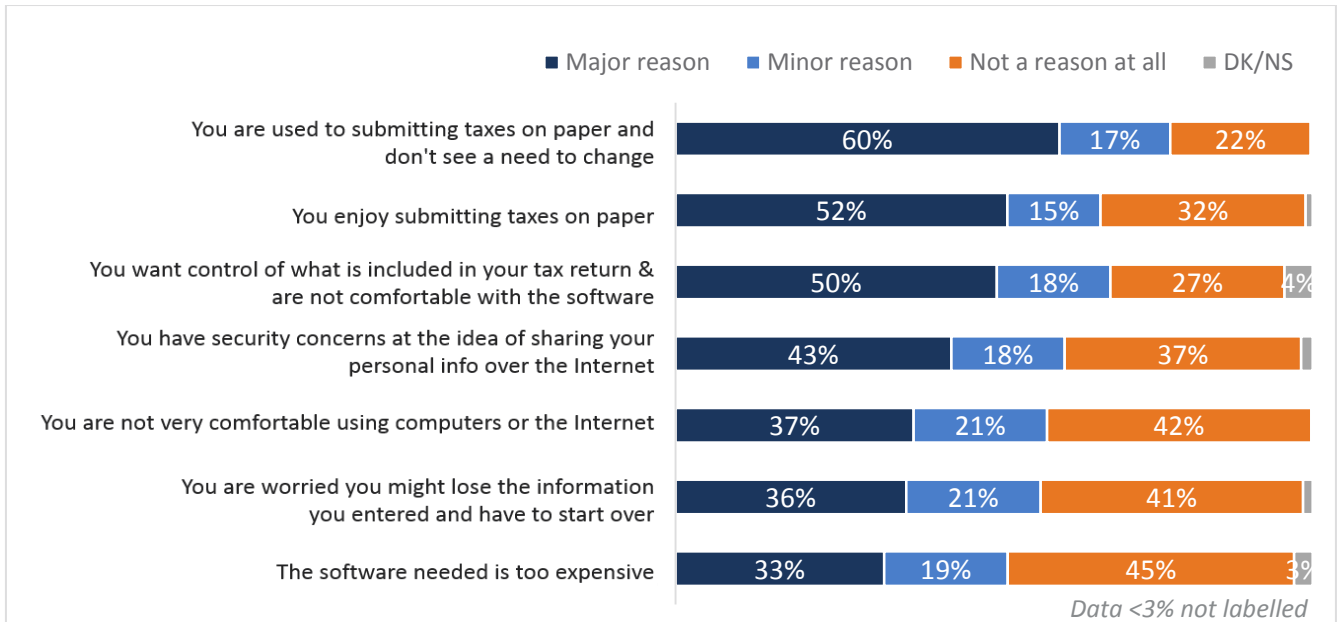
QP.1. What are the main reasons why you submitted your income tax return on paper last year rather than electronically? Base: Paper filers (n=315)

Following this open-ended question regarding paper filing, respondents were also asked to specify the extent to which a series of factors could explain why they preferred to use paper over electronic filing methods. On a prompted basis, six-in-ten (60%) paper filers once again listed being used to filing taxes on paper as a major reason for not switching to electronic filing. Only 22% among them said it was not a reason. Coming in second place was the fact that they enjoy submitting their taxes on paper (52% major reason), followed by the desire to “keep control” of what is included in their tax return (50% major reason).

Following these three leading reasons were security concerns at the idea of sharing their personal information over the Internet (43% major reason), lack of comfort using computers or the Internet (37%), worries about losing the information they entered (36%) and the cost of the software needed (33%).



FIGURE 6: Prompted Reasons for Preferring to File Taxes on Paper – Top Seven Reasons



QP4. There are a number of reasons why someone may prefer to submit their taxes on paper instead of electronically or online. Please indicate whether each of the following is a major reason, a minor reason or not a reason at all in explaining why you chose not to submit your taxes electronically or online last year.

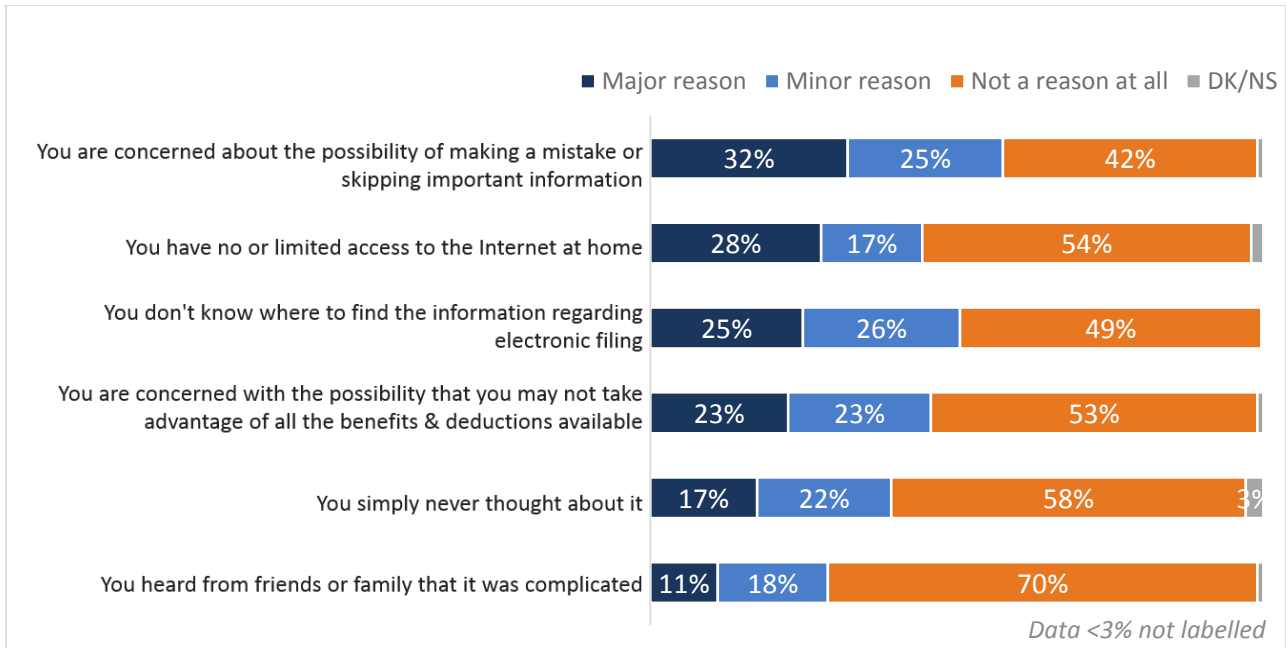
Base: Paper filers (n=315)

Smaller subsample sizes for paper filers make it difficult to generate statistically significant differences across demographic variables or other attitudes or behaviours. However, looking at results from a directional perspective, one can see that as a general rule, older individuals and those who do not have much experience with computers tended to score higher on most of the barriers identified above or below. These findings are corroborated by results from the qualitative phase of research on the reasons for filing taxes on paper, as detailed in section 2.2.3.

Coming in as the eighth most important reason for filing one's tax return on paper was a concern over the possibility of making a mistake or skipping important information (32% major reason). This was followed by having no or limited access to the Internet at home (28%), not knowing where to find the relevant information regarding electronic filing (25%) and concerns over the possibility that one may not be able to take advantage of all the benefits and deductions available (23%). The last two reasons cited, having never thought about it (17%) and having heard that it is complicated (11%) appeared to be minor barriers compared to previous ones.



FIGURE 7: Prompted Reasons for Preferring to File Taxes on Paper – Bottom Six Reasons



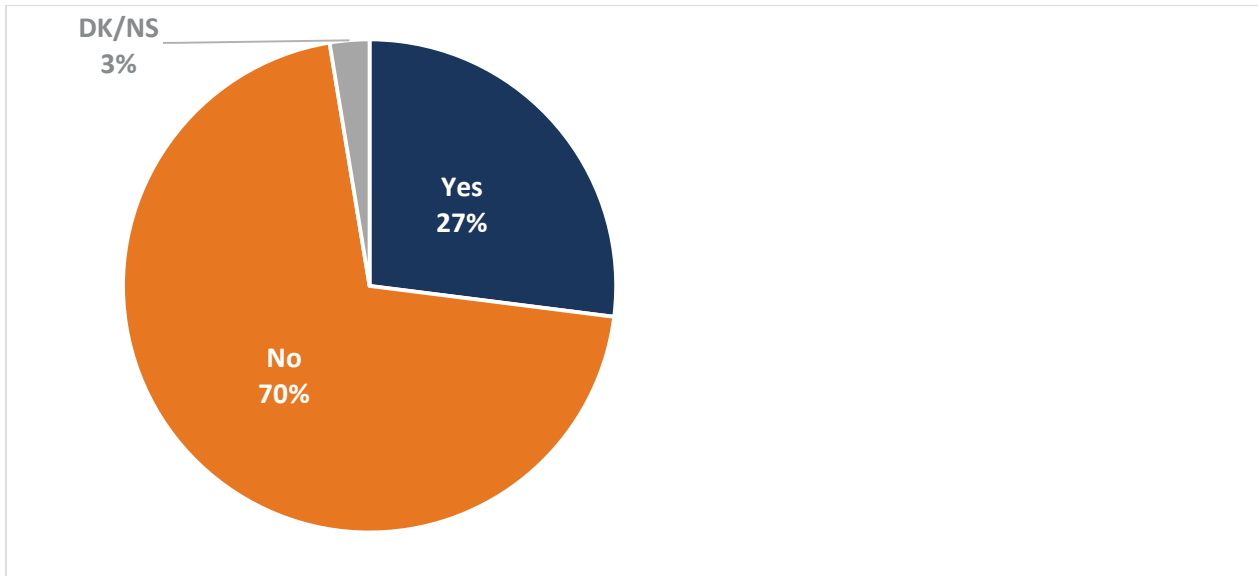
QP4. There are a number of reasons why someone may prefer to submit their taxes on paper instead of electronically or online. Please indicate whether each of the following is a major reason, a minor reason or not a reason at all in explaining why you chose not to submit your taxes electronically or online last year.

Base: Paper filers (n=315)

2.2.2 Paper Filers’ Previous Experience with Electronic Filing

More than one-in-four (27%) paper filers stated that they have tried filing their taxes electronically before, as shown in figure 8 below.

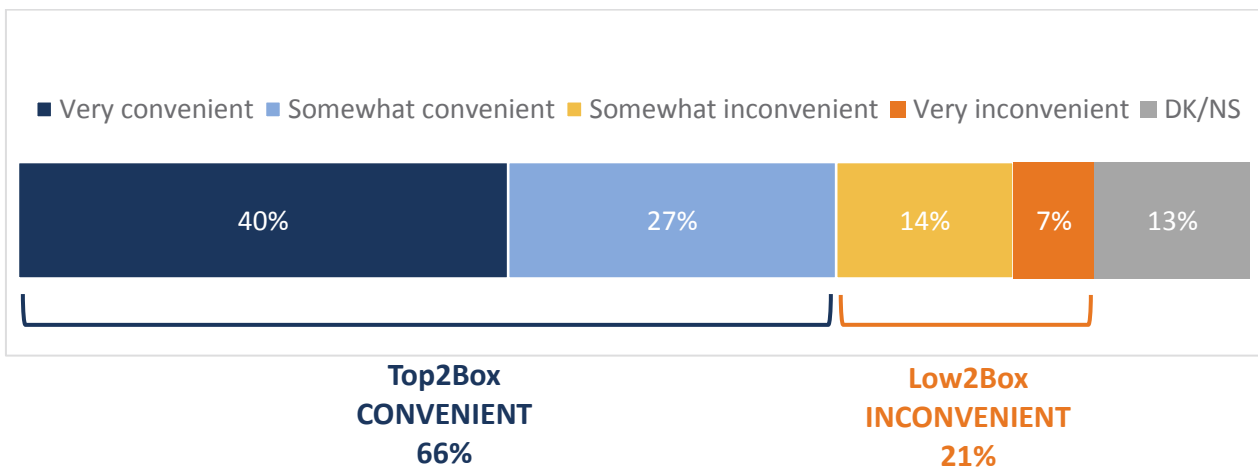
FIGURE 8: Have paper filers tried to submit electronically in the past?



QP2. Have you ever submitted your tax return electronically?
 Base: Paper filers (n=315)

Those who have tried filing electronically in the past were mostly of the opinion that it was convenient (66%). Four-in-ten (40%) said it was very convenient, with another one-in-four (27%) saying it was somewhat convenient. Only 21% rated the experience as somewhat (14%) or very (7%) inconvenient. While these numbers are fairly positive, they pale in contrast with the convenience level measured among netfilers (see Figure 11), suggesting a certain degree of resistance among paper filers in accepting the convenience of electronic filing.

FIGURE 9: Convenience of Electronic Filing Among Paper Filers with Previous Experience

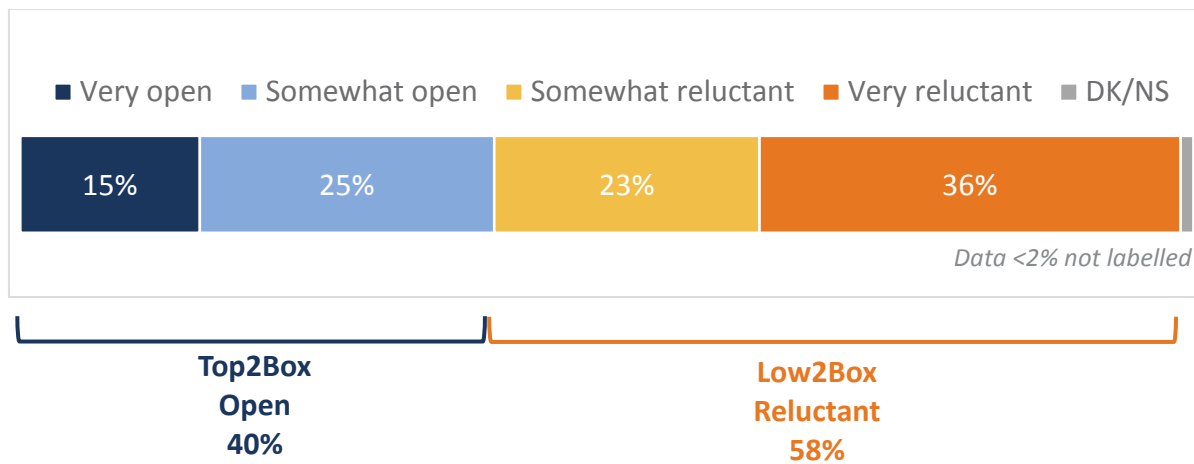


QP3. And, when you submitted your tax return electronically, how did you find the process? Was it ...?
 Base: Submitted tax return electronically (n=70)

When all paper filers (not only those who have tried before) were asked whether they would be open to changing to electronic filing in the future, results were mixed. One-in-seven (15%) paper filers stated that they would be very open to changing, with another quarter (25%) saying they would be somewhat open to the idea. A significant amount of resistance remained, with a full 36% saying they would be very reluctant and another 23% mentioning they were somewhat reluctant.

While smaller subsample sizes render statistically significant differences very difficult to obtain, directional data in tables and qualitative findings from focus groups suggest once more that older individuals and those who are less familiar with computers and the Internet are less likely to consider switching to electronic filing.

FIGURE 10: Openness to Change



QP5. How open would you be to the idea of submitting your taxes electronically in the future? Would you be...?
 Base: Paper filers (n=315)

2.2.3 Focus Group Discussion on Reasons for Filing on Paper

Participants in the first of two groups in each city were all paper filers. During focus group discussions, participants provided a number of reasons regarding why they remained faithful to paper filing at a time when a vast majority of Canadians submitted their taxes electronically through e-filing or netfiling, with two general axes dominating the discussion: comfort with paper filing and distrust of computers or the Internet.

Many paper filers across all locations stated that they were very comfortable filing their taxes on paper, often because this is what they had always done and did not see a need to change. This view was particularly strong among older participants with long-standing experience filing their taxes on their own. A few among them even stated that they enjoyed preparing their taxes on paper. To them, it was an annual ritual that they intended to pursue for years to come. The act of getting the paper forms at a local shop and spending a few hours at a desk or table to fill the forms was just something they did without questioning the need to use the same approach in the future. The fact that the paper filing



process was free while electronic filing was not (as far as they knew) was also raised as an advantage to paper filing.

Writing down information on a piece of paper was reassuring for many paper filers. They could “see” and “feel” what they were doing. It gave them the impression that they would see mistakes on paper before they filed their return and, because it was written on paper, that they could always fix those mistakes. This was not something they felt would be possible when preparing and filing electronically. Having a hard copy rather than a soft copy was also a key factor for them: “I want the hard copy. I always fill out a version to be mailed and a copy for me. I couldn't do that on a computer.” This fear of losing the soft copy was very real for many paper filers.

Paper filers varied in their comfort levels with computers and with the transmission of personal information over the Internet. Halifax participants stood out for being the most reluctant to use the Internet to file their taxes, mostly because they did not trust that it was safe. While similar concerns over the safety of Internet transactions and lack of comfort with computers were raised in other locations, they did not appear as deeply ingrained. In fact, the majority of paper filers across other locations said that they could possibly see themselves switching to online filing in the future, even if not happily so. Many paper filers thus believed that they would eventually have no choice but to make the transition. The fact that paper forms were now harder to find than in the past was raised as a sure sign that the “writing was on the wall” for paper filing.

Discussion demonstrated that while comfort with, and even enjoyment of, paper filing played a role in preventing the switch to electronic filing, paper filers who were the most reluctant to switching were those with deep distrust of computers and their safety. For some, this distrust was based on a simple lack of proficiency with computers. They did not know how to use them properly and did not trust themselves not to make a mistake when trying to file their taxes. Yet others stated that they were computer-literate, but had strong concerns over the safety of their personal information if shared over the Internet. They did not think that computers were good places to store personal information because it could be hacked or stolen.

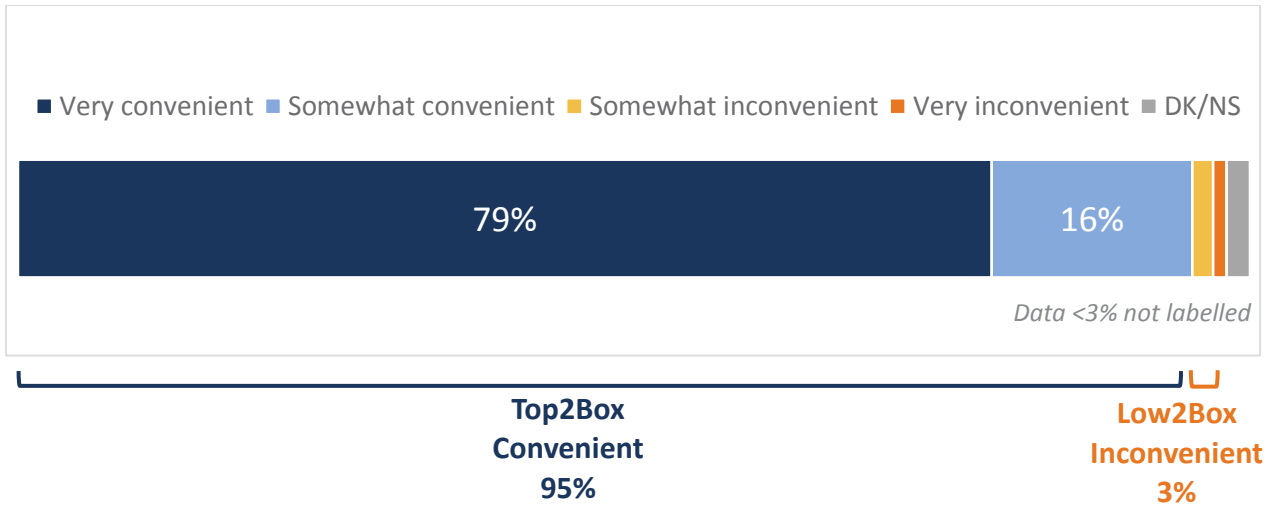
2.3 Netfile Users

2.3.1 Level of Experience with Netfiling

Netfilers were generally very happy with their experience in filing taxes electronically. A full 95% of them found the process either very (79%) or somewhat (16%) convenient.



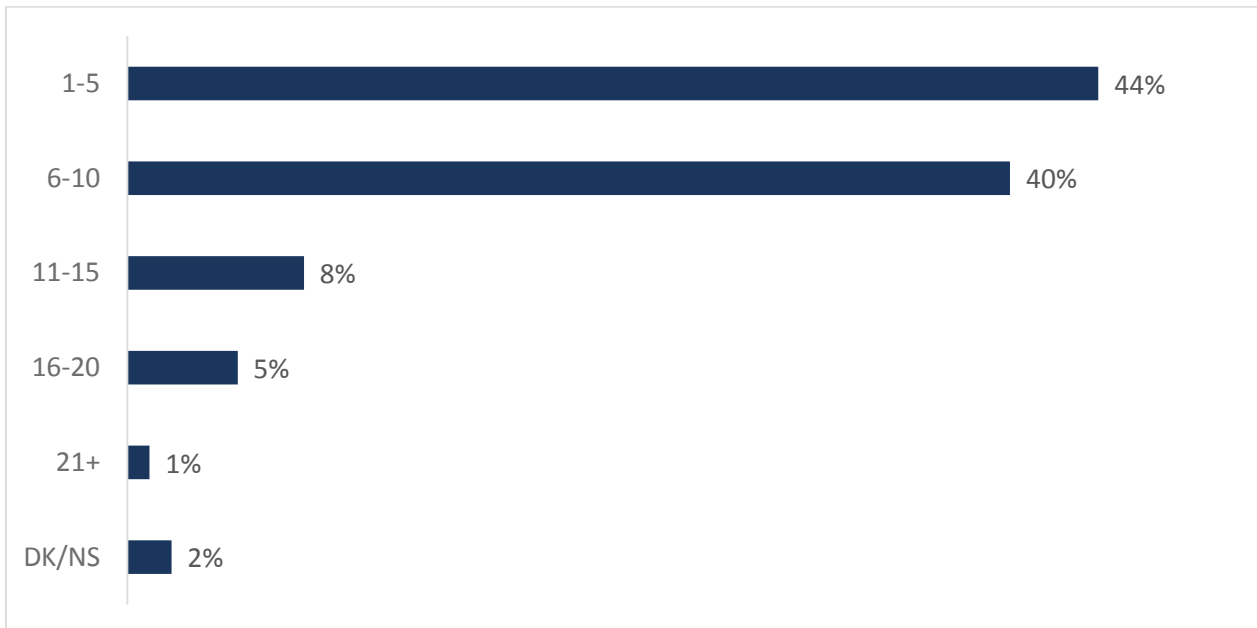
FIGURE 11: Convenience of Filing Electronically



QN1. When you filed your tax return electronically last year, how did you find the process? Was it...?
 Base: Netfile users (n=316)

Survey results show that nearly half (44%) of netfilers have been filing their taxes electronically for 5 years or less. Another four-in-ten (40%) said they have been doing it for six to ten years, while 14% have been filing electronically for more than 10 years.

FIGURE 12: Years of Experience with Electronic Filing



QN2. Approximately how many years ago did you start filing your taxes electronically?
 Base: Netfile users (n=316)

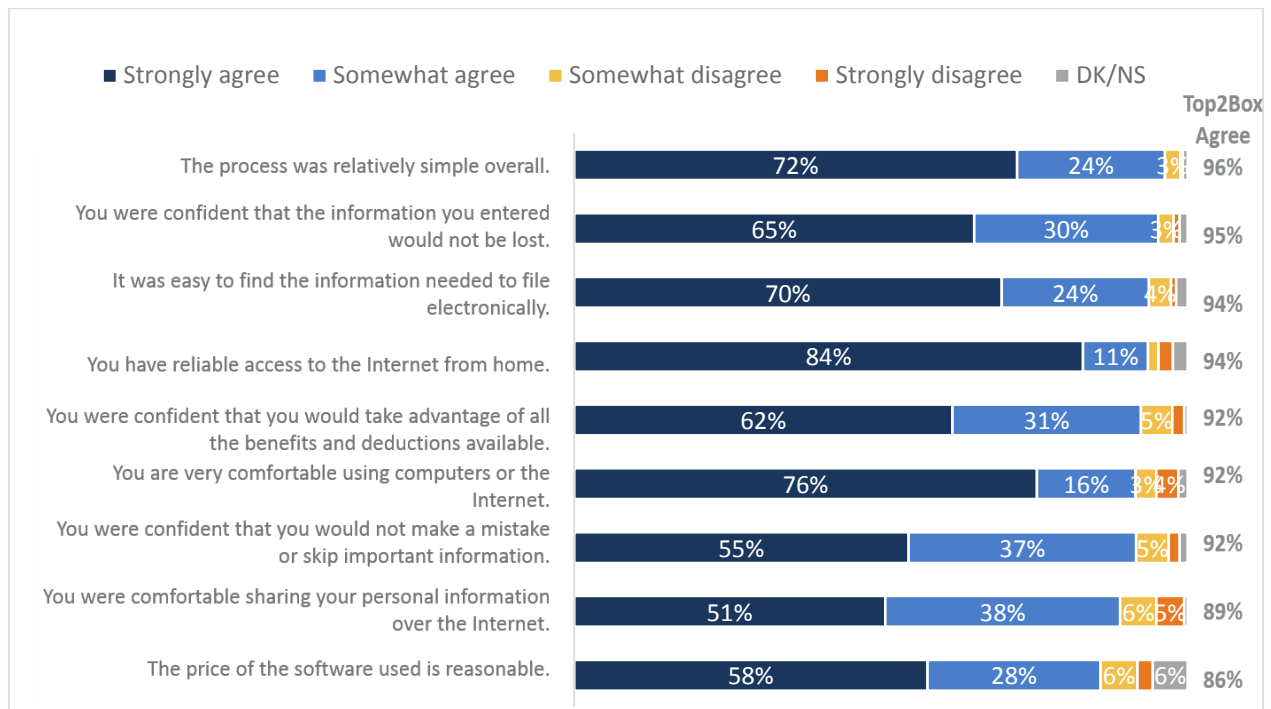
2.3.2 Advantages of Netfiling

In line with results presented above regarding the convenience of the electronic filing process, respondents held very positive views on a series of statements pertaining to their electronic filing experience. The lowest level of agreement received from any of the nine statements rated by respondents is 86%. Only by focusing on strong levels of agreement do we notice some differences from one statement to the next.

Thus, the last three statements from the list show that netfilers were slightly less unanimous in terms of paying for the software, level of comfort in sharing personal information over the Internet and trust that they would not make a mistake during the process. But results for these three items remained very strong and their relatively lower rankings should not be overstated.

No key differences emerged between subgroups due to smaller subsample sizes and very high levels of agreement across all demographic and attitudinal subgroups.

FIGURE 13: Views on Electronic Filing Process



QN3. Please indicate whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements regarding the electronic filing of your tax return.

Base: Netfile users (n=316)

2.3.3 Views on Netfiling in Focus Groups

Focus group results regarding the electronic filing process among netfilers mostly matched the findings of the survey component, but did not appear as overwhelmingly positive as survey results suggest. Netfilers mostly stated that the process was relatively simple, with only a few across locations raising major issues. Their views were particularly positive when they compared the netfiling process with previous experience preparing and filing their taxes on paper. None of the netfilers who took part in discussions said they would revert back to paper filing but some said they would be happy to have a free tax filing solution other than paper that was simple to use.

While netfilers in focus groups mostly felt comfortable with their current tax filing approach, many raised difficulties encountered in the past. Some shared negative experiences using tax software from years past, but in general they felt that new versions were easier to use and did not cause the types of problems they encountered in past years. Some also mentioned that they faced a fairly steep learning curve when they started filing online, but that they had grown more comfortable over time with the forms to be read and filled, as well as with the language used.

The process of filing taxes over the Internet did not raise significant safety concerns for most netfilers who took part in discussions, although some said that they understood it may not be 100% risk-free. However, these risks were not sufficient to make them reconsider their approach and were also not viewed as being greater than those faced when using other filing approaches. A few even said that the odds of having their paperwork lost in the mail were probably higher than having them lost over the Internet.

A few participants spontaneously asked whether it was possible to file electronically without having to pay for the software or the services of an accountant or tax preparation company. This generated a discussion among participants, with some thinking it was already possible and others thinking it was not. All agreed it would be nice to have this service readily available.

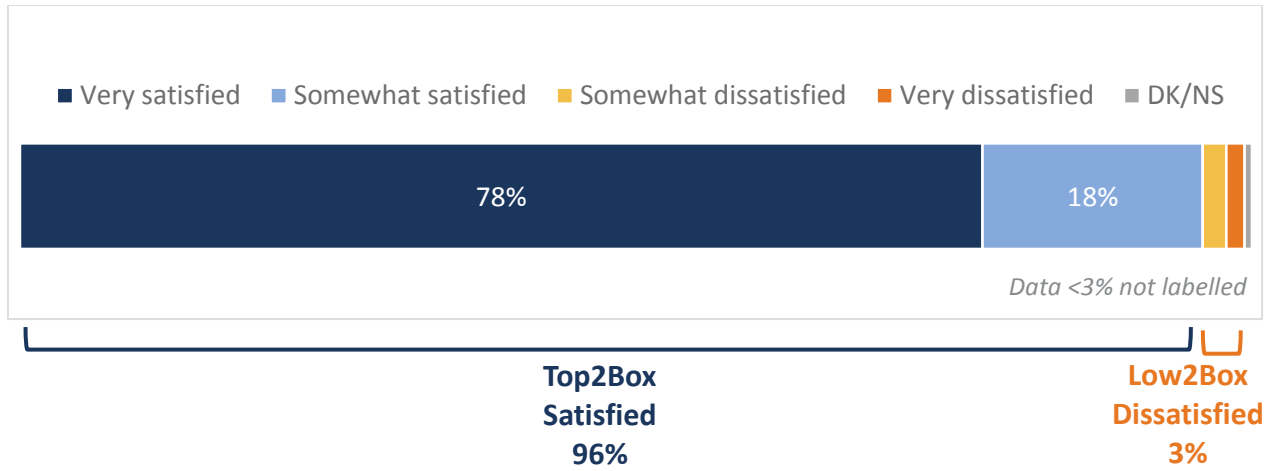
2.4 E-File Users

2.4.1 Satisfaction with E-Filing Services

Very similar to results obtained among netfilers, e-filers express a very high degree of satisfaction with their filing experience. A near unanimous 96% of e-filers say they are either very (78%) or somewhat (18%) satisfied with the services they received from their accountant or tax preparation company. Results do not vary significantly among subgroups.



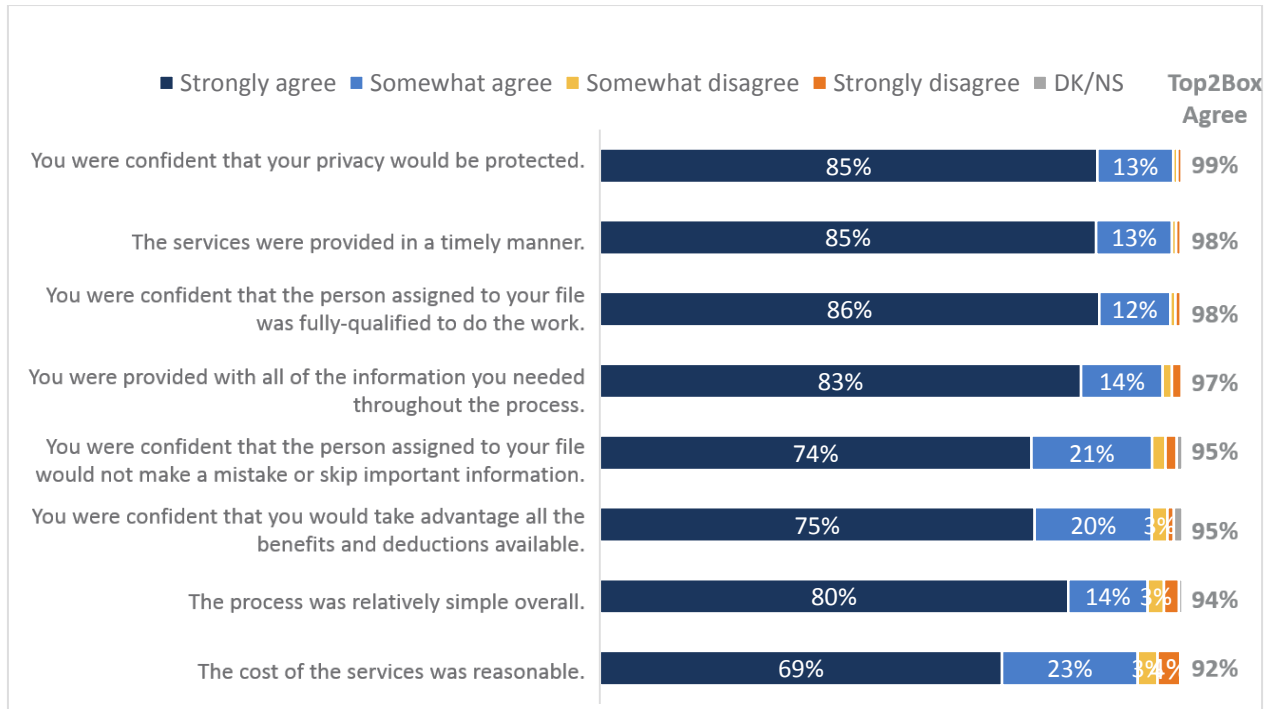
FIGURE 14: Satisfaction with the Service Received



QE1. You mentioned that you used the services of an accountant or a tax preparation firm such as H&R Block to prepare and file your taxes last year. How satisfied were you with the services you received? Would you say you were...? Base: eFile Users (n=564)

Similarly, all of the statements tested regarding their experience with e-filing garnered more than 90% agreement scores. Only small differences could be found regarding the intensity of agreement for three statements. Indeed, e-filers were slightly less likely to strongly agree that they were confident that the person assigned to their file would not make a mistake (74%), that they were confident in getting all of the benefits and deductions available to them (75%) and that the cost of the service was reasonable (69%).

FIGURE 15: Views on E-Filing Services Received



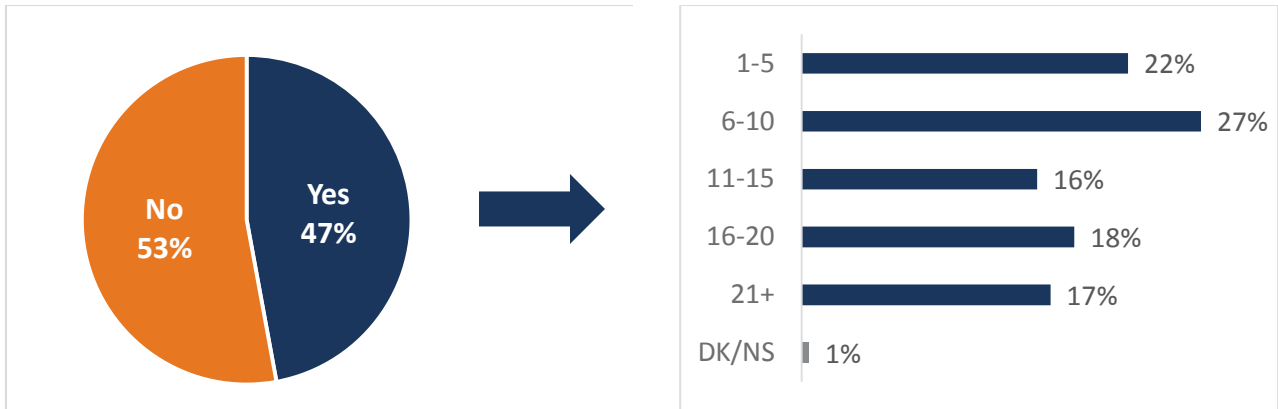
QE2. Please indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements about using the services of an accountant or a tax preparation company last year. Base: eFile Users (n=564)

2.4.2 Level of Experience with E-Filing

Among e-filers, nearly half (47%) said that they have had previous experience in filing their taxes on their own. Responses varied greatly when asked how many years ago they started using the services of an accountant or tax preparation company. Nearly a quarter (22%) said they made the change between 1 and 5 years ago, and more than a quarter (27%) stated that the switch took place between 6 and 10 years ago. Half of e-filers said that they have made the change more than 10 years ago, with an impressive 17% saying that the change took place more than 20 years ago.

Combining the e-filers who have never filed their taxes on their own with those who did file on their own but not within the last ten years, we note that the vast majority of e-filers have not filed their taxes on their own in the past decade (77%). This matches results of focus group discussions, where e-filers appeared least likely to feel comfortable with various aspects of the tax preparation and filing process.

FIGURE 16: Years of Experience with E-Filing



QE3. Have you ever prepared and filed your taxes on your own in previous years? Base: eFile Users (n=564)

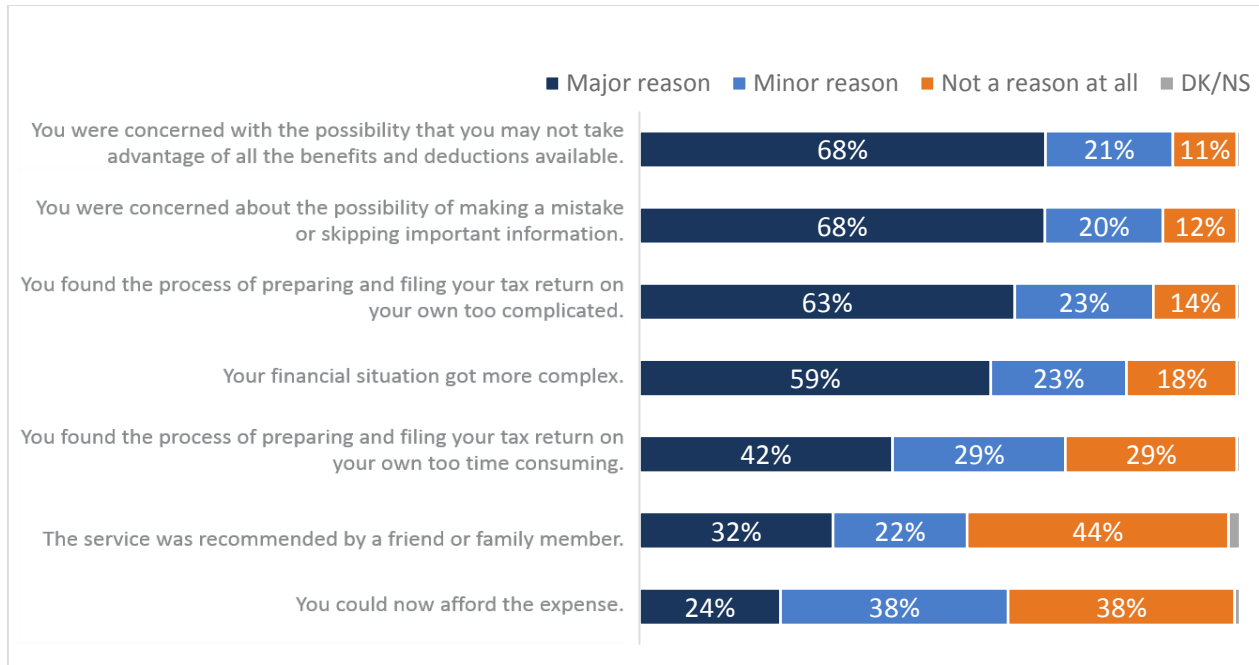
QE4. And, approximately how many years ago did you start using the services of a tax preparation company or an accountant? Base: Prepared and filed taxes on their own in previous years (n=255)

Why did so many switch to e-filing even though they had filed their taxes on their own in the past?

Survey results show that four reasons played a key role in this decision. The top two reasons listed for switching to e-filing were the fear of missing out on some of the advantages or benefits that were available (68% major reason) and concerns over the possibility of making a mistake or skipping important information (68%). The complexity of the tax preparation and filing process (63%) and the growing complexity of one's financial situation (59%) were also identified as key factors.

The time-consuming nature of the process (42%), recommendation from friends or family (32%) and being suddenly able to afford the expense (24%) are non-negligible, yet less important reasons for the switch to e-filing.

FIGURE 17: Reasons for Switching to E-Filing



QE5. Please indicate whether each of the following is a major reason, a minor reason or not a reason at all in explaining why you started using the services of an accountant or a tax preparation company to help with your tax return. Base: Prepared and filed taxes on their own in previous years (n=255)

2.4.3 Views on E-Filing in Focus Groups

Focus group discussions with e-filers showed that, as a general rule, most participants were happy to devolve the responsibility of preparing and filing their taxes to someone else. Discussions on the pros and cons of using the services of an accountant or a tax preparation company were short because participants did not have much information to share beyond being generally satisfied. As such, their opinions matched survey results showing quasi-unanimous satisfaction with the services they received from their accountant or tax preparation company. A few participants shared negative stories regarding mistakes that were made in previous years, but nevertheless planned to keep on using e-filing in coming years.

In general, e-filers who took part in focus groups displayed low levels of knowledge with the tax preparation and filing process. They preferred not to engage directly with the calculations involved. They were conscious of the fact that mistakes made by their accountant or tax preparation company remained a possibility, but did not necessarily trust themselves to file their tax return error free. Doing it through someone else was fast, easy and “relatively” inexpensive.

The cost of the service was nevertheless raised as an issue for some participants. If anything could make them change to another tax filing approach, it would be the cost. A few e-filers also mentioned that they

did have some concerns over the sharing of personal information with a third party, but most disagreed and felt comfortable, once again matching survey results.

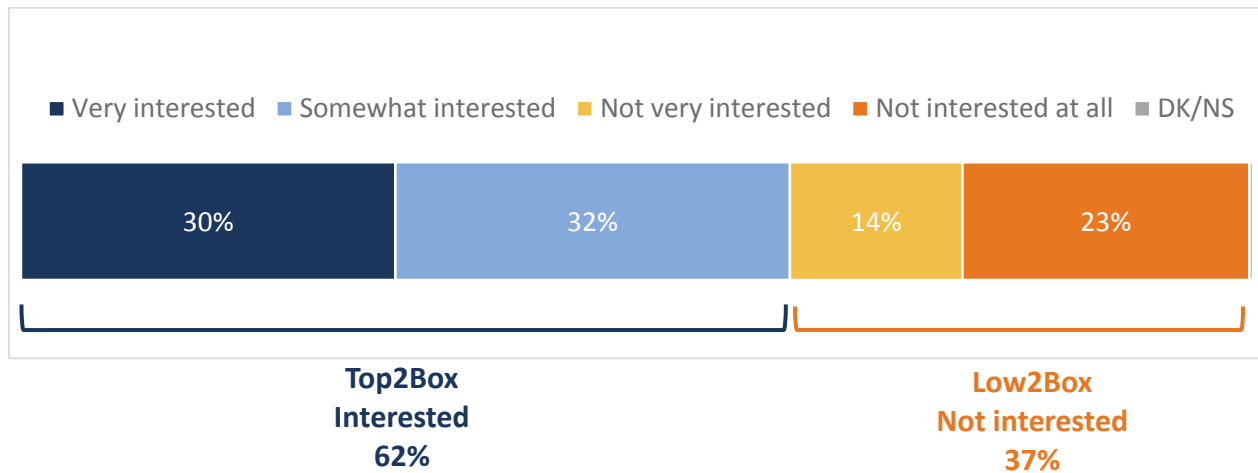
2.5 Views on Possible New Tax Filing Service

2.5.1 General Interest in the New Tax Filing Service

Survey respondents were presented with a general description of a potential new tax filing service offered by the Canada Revenue Agency before being asked a series of questions regarding their level of interest for using such a service. The general description of the service read as follows: *“I would now like to ask you a few questions regarding a new service that could be offered to Canadian taxpayers by the Canada Revenue Agency. This new service would provide direct tax filing assistance to Canadians so they could file their tax returns online or over the phone through an automated system by answering simple yes/no questions without the need for any calculations on the part of the taxpayer. This service would be offered at no charge to eligible Canadians who have consistent and simple sources of income from one year to the next.”*

After having been read this description, 62% of respondents said they would be very (30%) or somewhat (32%) interested in switching to this new service. A quarter of respondents (23%) said they would not be interested at all.

FIGURE 18: Interest in New Tax Filing Service



QS1. If you were eligible, how interested would you be in switching from your current filing method to this new service from the Canada Revenue Agency (repeat description from above if necessary)?

Base: All Respondents (n=1,259)

Level of interest in the new service varied greatly depending on a number of demographic, attitudinal and behavioural factors. Younger respondents aged 18 to 34 years old were more likely to be interested (79%) compared to those aged 55 to 64 years old (64%) or 65 years and older (55%).

Focusing on current filing methods, we notice that netfilers were most likely to be interested in the new service (75% interested). Interestingly, paper filers were also highly interested in switching to this new service (65%). Paper filers who previously mentioned that they were open to filing electronically in the future were much more likely to report being interested in this new service (85%) compared to those who said they would be reluctant to use electronic filing (51%).

Those who currently use e-filing services were somewhat less likely to be interested in this new service (56%). Respondents who mentioned that they typically file their taxes themselves were more likely to be interested (69%) in this new service compared to those who said they typically get assistance from family members, friends or volunteers (57%). Self-employed (53%) and retired (58%) individuals were less likely to be interested than those in other employment status groups.

2.5.2 Focus Group Testing of the *File My Return Invitation Letter*

Focus group participants were provided with an invitation letter presenting the new tax filing service and were asked to take a few minutes to read it before answering a series of questions about its content. The full letter can be found in the appendix, section 3.1.6.

Most participants reacted positively to the invitation letter. They were interested in knowing more about this new service and mostly agreed that if they received this letter through the mail, they would seek out more information. It represented a clear call to action for most participants. Many participants immediately noticed that the service would be free, which they viewed very positively.

A few participants even had very strong positive reactions when reading the letter, feeling that this was exactly what they had in mind when they complained that the process should be simpler for individuals with simple tax returns: "The government already has this information, so there is no need for us to fill all of this information every year"; "This is great: simple, fast and accurate".

In general, the content of the letter and the level of language used were deemed to be clear and easy-to-read. The first bullet point pertaining to eligible revenue streams generated confusion for some participants who thought it was too technical, but most participants did not share this point of view. A few participants said that the three bullets presenting the eligibility criteria confused them. They were not sure if they had to fulfill all three criteria, or simply one of them. The presence of "or" as well as "and" in bold lettering seemed to generate this confusion.

Participants who did not react positively to the invitation letter mostly stated that they did not believe they would be eligible for the service, even though recruiting requirements and discussions regarding their personal financial situation seemed to indicate that they would be eligible. This lack of understanding regarding eligibility requirements was consistent across all locations and in both paper filers and electronic filers groups. It also resurfaced during the discussions on the online and phone demonstrations shown to participants.

While a few participants did raise valid reasons for likely not being eligible to use the new service, most were possibly incorrect in their assessment. One of the concerns raised pertained to disability payments,



which many participants felt may not be included as part of this service. Such payments were not automatically deemed to be part of the fixed income categories presented in the letter or in the online or phone demos shown. Another point of contention raised in all locations was whether it would be possible for service users to claim medical expenses. Many participants felt that unless they were able to claim such expenses while filing their return, they would end up losing money on a yearly basis. This was enough to convince them that this new tax filing service would not be good for them. Similar concerns were raised for provincial benefits and multiple types of deductions, such as charitable donations. Some participants also spontaneously questioned whether this service could apply to couples, as they felt it more likely applied to people living on their own.

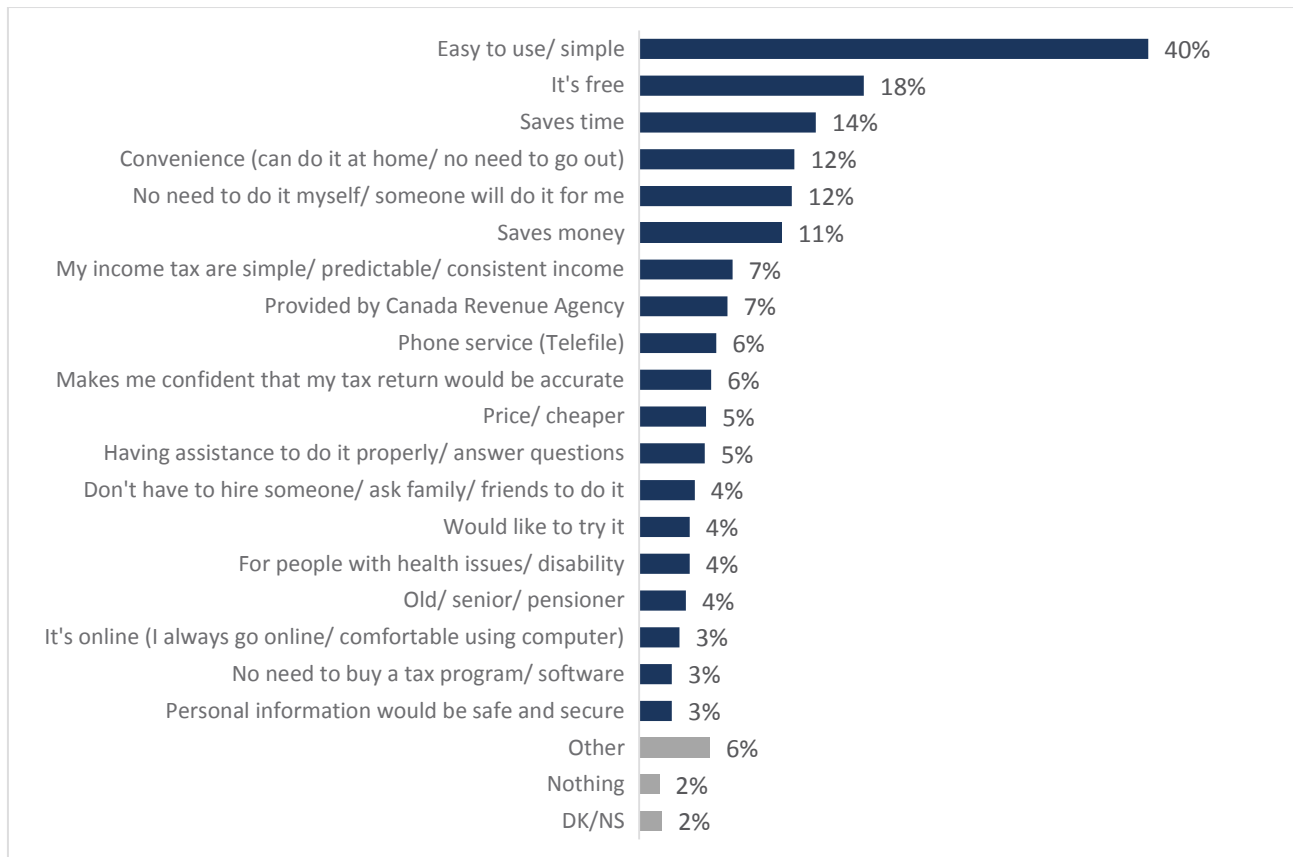
Once all these concerns were aired during the discussions, the moderator asked participants whether they would be interested in this new service *if* they were indeed eligible. The answer was a resounding yes for the vast majority of participants. This program made perfect sense to participants and they were glad to see that it would be provided both online and over the phone. This was seen as key to ensure that individuals who are not comfortable with a computer or don't have access to one, as well as people with disabilities, had a chance to take part.

2.5.3 Drivers of Interest in the New Service

On an unprompted basis, the main reasons provided for being interested in this new tax filing service relate to simplicity and low cost. Respondents said it seemed easy or simple to use (40%), would save time (14%) and would be convenient (12%). Regarding costs, respondents were attracted by the fact that it is free (18%), it would save money (11%) and would be cheaper (5%). The fact that the service would be provided by the CRA (7%) was also raised as a positive aspect.



FIGURE 19: Unprompted Reasons Driving Interest in New Tax Filing Service



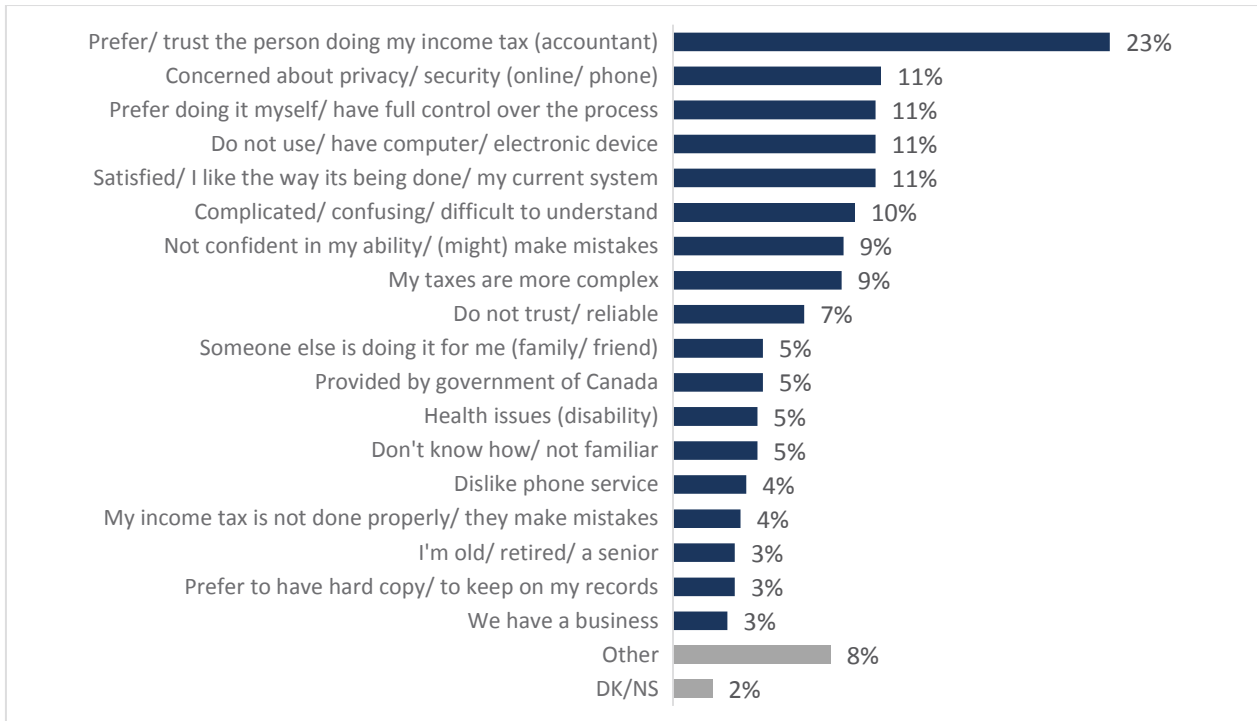
QS2. Why is this an interesting offer for you? Base: Those interested in the new service (n=788)
 Items with a score of 2% or less not shown.

Conversely, those who stated they were not interested cited a number of reasons for their reluctance. The reason most frequently given for not being interested was trust in the person or company currently preparing their income tax return (23%). Then came a series of seven reasons provided by 9% to 11% of respondents. They included concerns about privacy or security (11%), a preference for doing things themselves and having control over the contents (11%), not having a computer at home (11%), liking things the way they are (11%), thinking the new service may be complicated (10%), lacking the confidence to do it themselves (9%) and finally, believing that their taxes are too complex for this new service (9%).

Not surprisingly, e-filers were the most likely to raise trust in their current accountant or company as a reason for not being interested (33%), compared to only 9% of netfilers and 3% of paper filers. By contrast, netfilers (24%) and paper filers (19%) were much more likely to say that they prefer to have control over the process compared to e-filers (5%).



FIGURE 20: Unprompted Reasons for Not Being Interested in New Tax Filing Service



QS3. Why is this not an interesting offer for you? Base: Not interested (n=468)

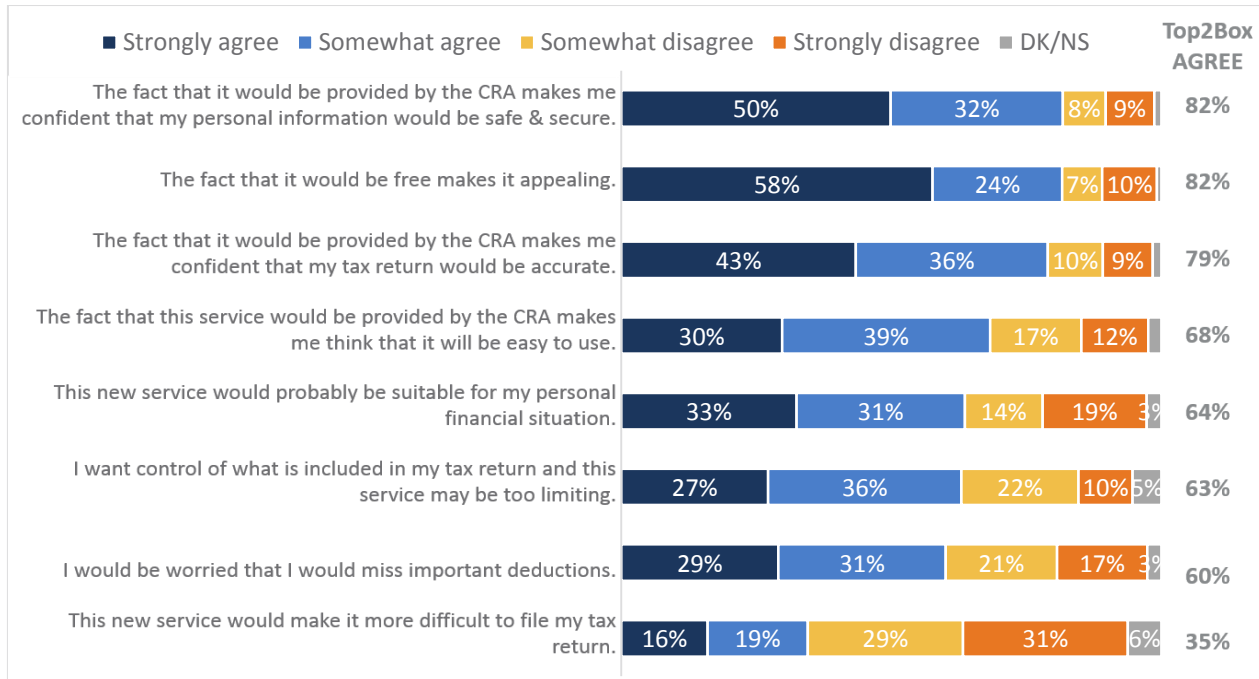
Items with a score of 2% or less not shown.

2.5.4 Views on Advantages and Drawbacks of the New Tax Filing Service

Consistent with the high degree of interest for the new tax filing service, respondents had mostly favourable views on various attributes of the service. More than eight-in-ten said they are confident that their personal information would be safe and secure if they used the CRA-run service (82%) and that the service being free makes it more appealing (82%). Nearly eight-in-ten also agreed that because the service is offered by the CRA, they are confident that their tax return will be accurate (79%). A strong, yet less overwhelming, majority also agree that the fact the service is provided by the CRA would likely make it easy to use (68%) and that the service would likely apply to their personal financial situation (64%).

On the negative side, six-in-ten agreed that the new service may be too limiting (63%) and worried that they may miss important deductions (60%). Only one-in-three (35%) agreed that the new service would make it more difficult to file their tax return.

FIGURE 21: View on Various Aspects of the New Tax Filing Service



QS4. Please indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the following statements regarding this new service. Is that strongly or somewhat?

Base: All Respondents (n=1,259)

Answers to this series of questions varied greatly according to respondents' willingness to consider the new tax filing service. Those who were not interested were less likely to agree that their personal information would be safe and secure (65% agreement compared to 93% for those who were interested), that the service being free makes it appealing (58% compared to 96%), that it would be accurate (59% compared to 92%), that it would be easy to use (45% compared to 88%) or that it would apply to their personal financial situation (33% compared to 82%). The fact that only 33% of those who are uninterested in using the new service thought it would apply to their personal situation clearly match one of the key findings of the qualitative component of the research, where many participants expressed strong doubts about their personal eligibility despite all evidence pointing to the contrary.

As a general rule, younger respondents were more likely to agree with the positive attributes of the service presented to them (free, accurate, safe, easy to use, suitable for their personal situation), while being less likely to agree with the negative aspects (too limiting, missing information and more difficult). Similarly, those who never use the Internet or use it less than once a week were also more likely to agree with the idea that the new service will make it more difficult for them to file their tax return (46% compared to 27% among those who use it more frequently). Respondents holding a high school degree or less were also more likely to agree with the idea that this new service would make their tax filing more difficult (42%).

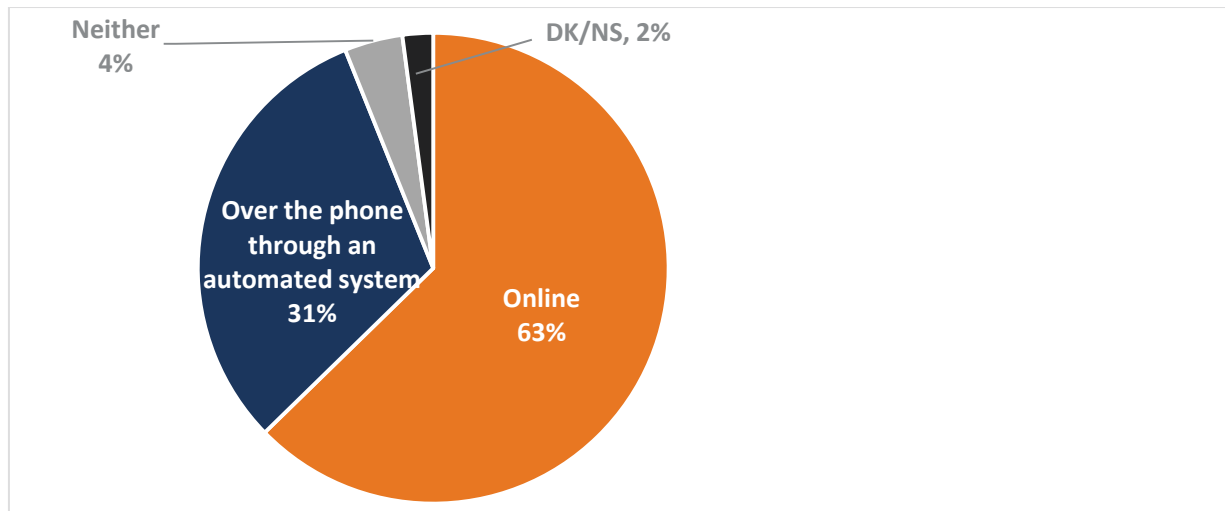
The current tax filing method used by respondents also had an impact on views regarding the attributes of the new service. E-filers (68%) and netfilers (55%) were more likely than paper filers (46%) to agree with the idea that the new service may make them miss important deductions, or that it may be too limiting (67% for e-filers, 65% for netfilers and 51% for paper filers). E-filers were also more likely than others to feel that this new service would make their filing more difficult (41%). This may be directly related to focus group findings showing that e-filers were less likely to feel well-equipped to file their taxes on their own and, therefore, preferred to devolve this responsibility onto someone else.

Respondents who are currently working (58%) and those who are self-employed (44%) were less likely to think that this new service would apply to their financial situation, which is an accurate assessment of the new service as it is now proposed.

2.5.5 Online versus Phone Option

Two-thirds of respondents (63%) mentioned that they would prefer to use the online version of the new service, with the other third (31%) preferring the phone option. This finding reflects general views expressed during focus groups, where a majority of respondents said they would prefer the online version after they had read the description provided in the information letter shown to them. When participants were told that the phone option would not include a live caller but an automated system, most of those who had expressed a preference for the phone option changed their mind in favour of the online version.

FIGURE 22: Phone vs Online Option



QS5. If you could choose one, would you prefer to access this service online or over the phone through an automated system?

Base: Very/Somewhat/Not very interested (n=965)

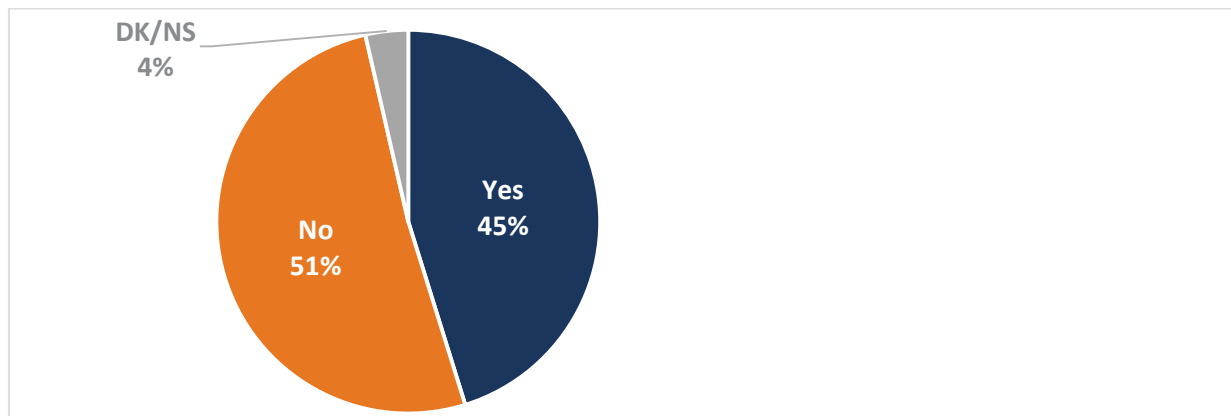
A number of variables affect respondents' preference for one option over the other, starting with key demographics. Respondents who are older, less educated and with lower household incomes were much less likely to choose the online option compared to those who are younger, more educated and have a higher household income. Residents of the Atlantic provinces (43%) were also more likely to prefer the phone option compared to residents of other regions. Those who are retired (41%) or unemployed (39%) were also more likely to prefer the phone option.

Current filing method was also an important determinant of preferences, with paper filers (47%) being most likely to choose the phone option, followed by e-filers (34%) and netfilers (12%). Not surprisingly, Internet usage was also a key predictor of preference, with those who access it on a daily basis being much more likely than others to prefer the online option (78%).

2.5.6 Current and Future Usage of MyAccount

Nearly half of respondents currently use MyAccount, the online service from the Canada Revenue Agency. Not surprisingly, netfilers (75%) were much more likely than others to currently use MyAccount. By contrast, residents of Quebec (38%) and the Atlantic (38%) were least likely to report using it. Those with higher levels of education and higher incomes are more likely to report being current users compared to those with lower levels of education and income.

FIGURE 23: Current Usage of MyAccount Among Potential Clients of New Filing Service



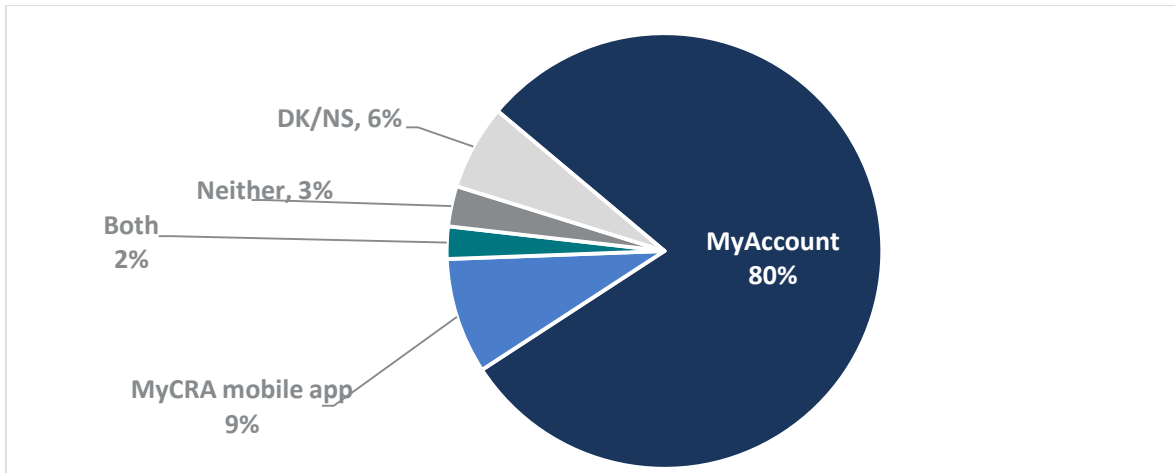
QS6. Have you registered with the Canada Revenue Agency's MyAccount online service? MyAccount is an online service that allows you to track your refund, view or change your return, check your benefit and credit payments, view your RRSP limit, set up direct deposit, and receive online mail among other things.

Base: Very/Somewhat/Not very interested (n=965)

The vast majority of those who said they would be willing to use the online version of the new tax filing service said they would do so using MyAccount (80%) as their preferred access point, compared to 9% who would use the MyCRA mobile app.



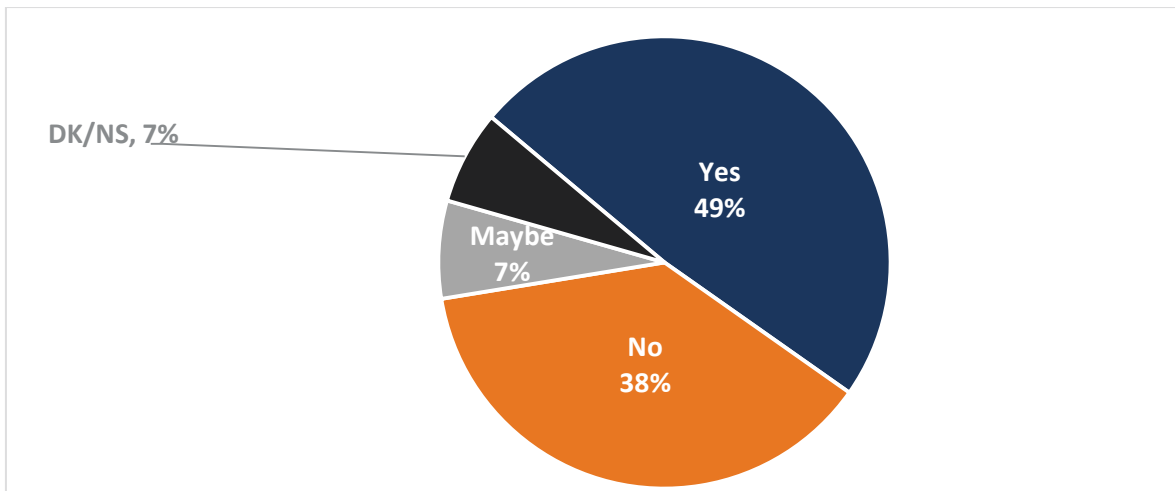
FIGURE 24: Would New Filing Service Users Prefer Access thru MyAccount or MyCRA App?



QS7. You said you would prefer to access this new service online. Would that be using MyAccount or the MyCRA app for mobile devices? Base: Prefer online (n=580)

Half (49%) of those who are not currently registered to MyAccount said they would likely register if the new tax filing service were available. Those aged 65 years and older (35%), those residing in the Atlantic provinces (42%) and paper filers (41%) were less likely to say they would register.

FIGURE 25: Would New Filing Service Users Register to MyAccount?

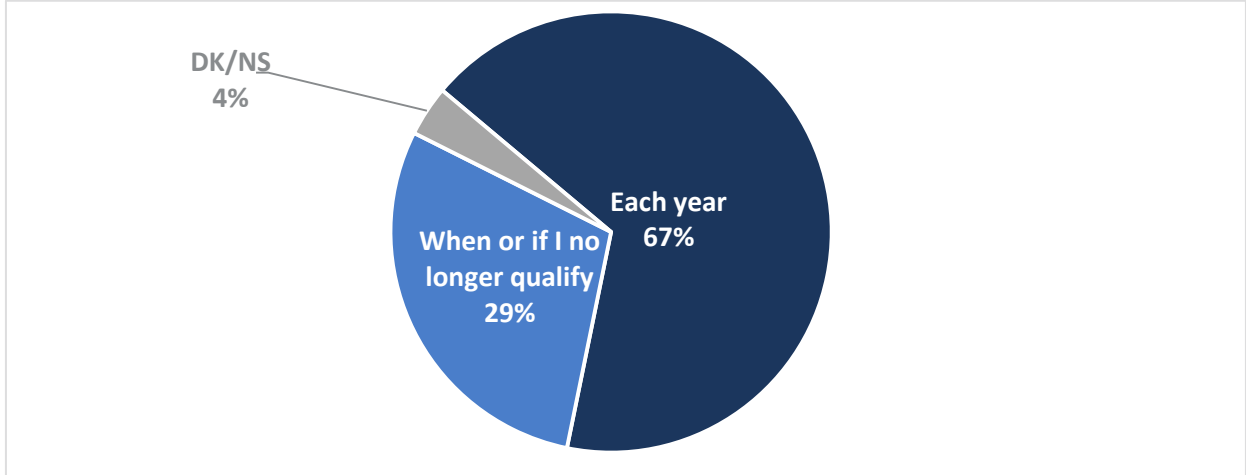


QS8. Would this new service make you register to the CRA's MyAccount online service? Base: Have not registered (n=540)

2.5.7 Views on Communications about the New Tax Filing Service

If given the choice between being reminded of their eligibility for the new tax filing service on a yearly basis or only if their status were to change over time, two-thirds (67%) of respondents said they would prefer to be reminded each year. Focus group participants expressed similar views, stating that this was the case with most other programs and it would also serve as a yearly reminder that it was time to file their taxes.

FIGURE 26: Desired Frequency of Eligibility Reminder



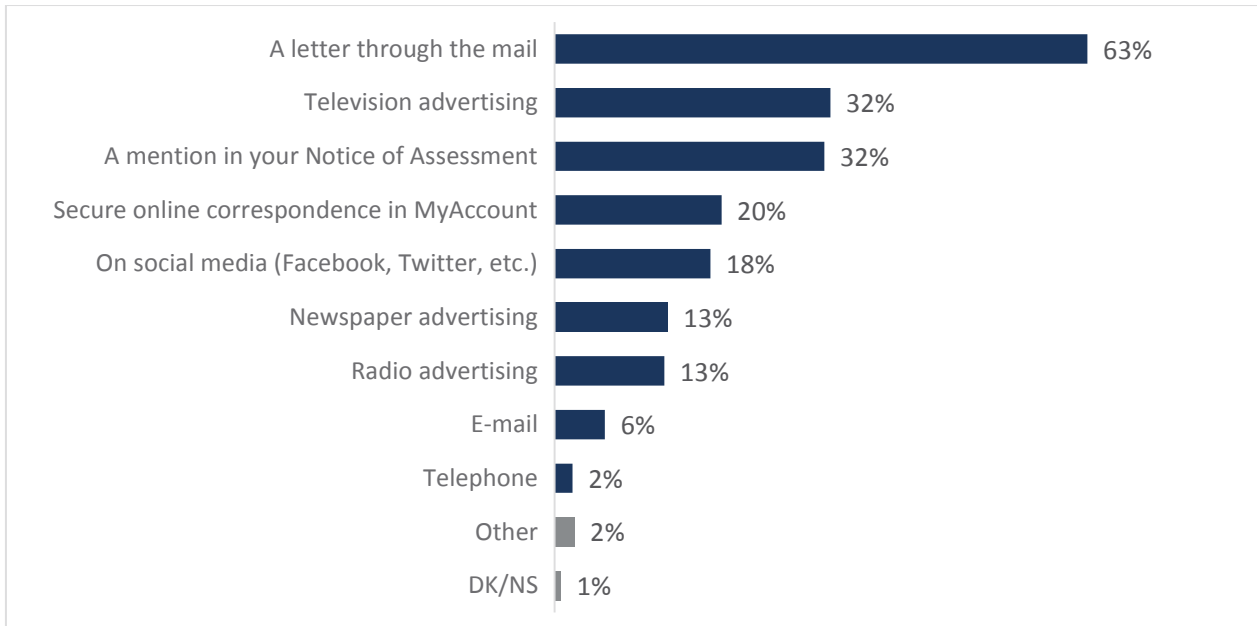
QS9. If you could use this new service, would you prefer to be notified of your eligibility each year, or only notified when or if you no longer qualify?

Base: Very/Somewhat/Not very interested (n=965)

When asked what would be the best way to communicate with them about the new tax filing service, a majority of respondents would prefer to be notified of the new service via a letter delivered through regular mail (63%). Another third said it could be done through television advertising (32%) or through a mention in their Notice of Assessment (32%). This was followed by secure online correspondence available in MyAccount (20%), messages on social media (18%), newspaper advertising (13%) and radio advertising (13%).



FIGURE 27: Preferred Communications Channel for Information on New Filing Service

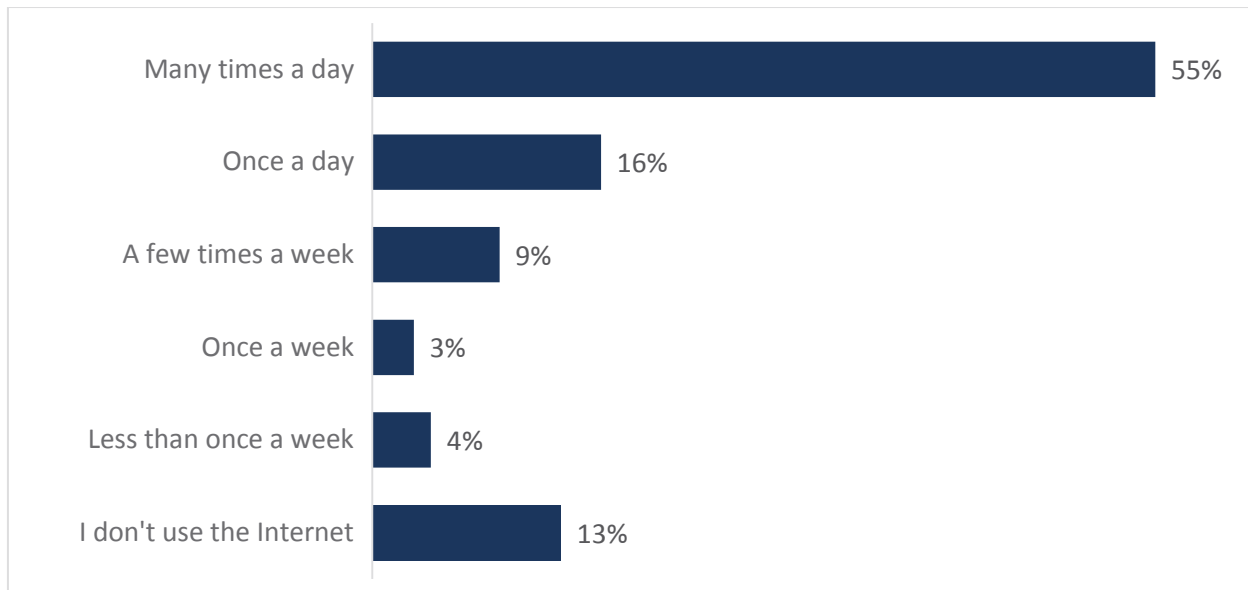


QS10. In your opinion, what is the best way to inform taxpayers, such as yourself, about this new service? Should they be notified via ...?

Base: Very/Somewhat/Not very interested (n=965)

A majority of those who were potentially interested in the new tax filing service stated that they use the Internet multiple times a day (55%), while 16% said once a day and 9% said they use it a few times a week. Another 7% stated that they use it once a week or less, and 13% said they never use the Internet. In line with previous findings, those with higher levels of education and income, as well as younger individuals, were more likely to be frequent Internet users. Netfilers (75%) and e-filers (52%) were much more likely than paper filers (38%) to use the Internet many times a day.



FIGURE 28: Internet Usage Among Potential Users of New Filing Service

QS11. How often do you access the Internet? Base: Very/Somewhat/Not very interested (n=965)

2.6 Focus Group Testing of the Online Demo Version

An online demo version of the *File my return* service was shown to participants in all locations. All demos shown were adapted to ensure that it contained information that was relevant to each region, such as specific provincial programs or deductions. The moderator filed a mock tax return on-screen with participants to show them all steps required to complete the process. The demo versions allowed participants to see what would happen if they entered an ineligible answer and provided an accurate assessment of the time needed to fill out the forms. Participants were also shown a mock filing confirmation page so they could see the confirmation number they would be provided upon clicking the “submit” button.

Overall, reactions to this online demonstration were very positive. Many participants were thoroughly impressed with the simplicity of the procedure, which took only 3 to 4 minutes to complete. They felt it looked extremely easy to do compared to what they had experienced in the past, whether on paper or electronically: “Wow! How nice is that?!”. A few even said that it looked too good to be true, saying that their past experience with filing taxes on their own or working with various government programs had been anything but simple. Participants were almost unanimous in saying this new service was a great idea and that they would want to get more information about it.

Upon seeing how the service worked on screen, the vast majority of participants said they felt reassured about its safety, even among those who had raised concerns when reading the invitation letter prior to seeing the online demo. The login process was a very positive feature, as it showed that this was administered directly through a government website, which most participants felt would be secure and

would not share information with third parties. The fact that the service would require users to enter a fairly limited amount of financial information, with most entries taking the form of yes-no answers, also made some participants feel better about the safety of the process. These participants felt that very little could be “stolen” or intercepted by hackers. Only a handful of participants remained doubtful about security after seeing the demo.

Participants already registered with MyAccount were glad to see that they could simply use the same login process to access the new service. They also stated that this probably meant that the process would only be simpler from year to year since they would not have to re-enter some of the core information that was already on file. Those currently not registered with MyAccount mostly agreed that they would register if needed. The process made sense and was reassuring to them as well.

The process of actually *seeing* how this tax filing service would work seemed to clarify some of the information contained in the invitation letter. Some participants spontaneously mentioned that they now understood how the CRA could use the information they had on file to fill out their tax return: “Well, yes, it makes sense that you only need to confirm that the information they have on file is correct so it can be processed”. Without seeing the demo, the concept of using simple yes/no questions was not well understood by some.

A common question raised by participants was whether they would be able to see a completed version of their tax return before clicking on the “submit” button at the bottom of the page. Most felt that this would be a very good, sometimes even essential, feature of the service. They wanted to see the final product on screen, with many of them also wanting to print a hard copy for their record, before they sent it in. This was viewed as particularly important given that their income figures were not entered on the *File my return* web page. Without seeing such numbers, many said they would feel insecure until they got their Notice of Assessment back in the mail: “Did I make a mistake? Am I going to get money back? Can I go on vacation or should I hold back on spending?”.

These questions reflected some of the earlier discussions held during the group sessions, where many participants felt much better when having a hard copy of their return at home. It provided a sense of security should a problem arise with their computers or with the information they had entered on the website: “I want to have this in my files at home, not just on my computer because anything can happen to a computer”.

Many participants who had raised concerns over their eligibility to use the service or the possibility to include various receipts or deductions re-stated those same concerns upon seeing the online demonstration. They did not see any space for entering the information they felt was missing and became even more convinced that this service was likely not for them. Yet when these concerns were put aside, they agreed that this was a great idea and were impressed by the simplicity of the process.

Despite the reservations expressed concerning the possibility of claiming certain credits or deductions, a few participants said they were reassured upon seeing that the online demo included regional specifications, such as the Trillium Benefits in Ontario, or the volunteer firefighter and the Nisga'a Nation exceptions in Nova Scotia and British Columbia respectively. Also, some of the earlier questions



regarding the eligibility of couples were assuaged by the demonstration, which included a question on the identity and income of spouses or common-law partners.

The few participants who remained reluctant to agree they would use this service if they were deemed eligible cited two main reasons: they already had assistance that worked well for them or they felt that they did not have sufficient financial literacy or proficiency with computers to do this by themselves. A handful of paper filers said they would stick with paper filing because they simply did not trust computers or the Internet to treat this information safely.

2.7 Focus Group Testing of the Phone Version

Focus group participants were presented with a detailed description of the phone service. Each participant was provided with a printed description of the entire phone call, as devised by the CRA. They were told that this sheet would be provided through regular mail as a primer to those who would want to use the phone service. This primer was meant to allow them to anticipate the questions to be answered and any accompanying documents they might need during the call. The complete phone information sheet can be found in appendix 3.1.7 for review.

Reactions to this phone version were mixed. On the one hand, participants unanimously agreed that it was necessary to provide a phone option for those without access to a computer and persons with disabilities. On the other hand, most participants also said they would not use it themselves. Participants felt it reflected positively on the government that they would make this phone option available for those who could not use the online version. A few participants who had used a phone system to fill out their taxes in years past said they might be interested in doing it again because they had had a good experience with the old system. A handful of participants who were reluctant to use the online version because of a lack of proficiency with computers said they would be willing to give the phone option a try.

Contrary to the online option, which was seen as very simple and fast, the phone version was mostly seen as taking longer to fill out and being more complex in general. When asked how long they felt it would take to complete and file their return over the phone based on the information sheet they had in front of them, participants provided a wide array of answers, showing that the complexity of this process was harder to gauge when compared to the online version. Answers ranged from 10 minutes to a full half-hour, with most answers being in the 15 to 20 minutes range.

Having to use an automated phone system rather than talking to a live person to fill out the information generated mainly negative reactions, although a few participants felt it was better because it reduced the possibility of human error at the other end of the line and would allow them to call at any time. As a general rule most participants did not appreciate automated phone systems, no matter who ran them. They could immediately recall bad experiences where the information provided over the phone was complex or unclear or when they got "lost" in the system and gave up on getting what they were looking for. This appeared particularly daunting when dealing with the type of personal financial information contained in a tax return.



In part because most participants believed it would take 15 minutes or more to complete, they expressed doubts with regards to their ability to understand and answer properly all questions when doing this over the phone. Most participants were concerned about making mistakes or not hearing some of the instructions properly. This also raised a lot of concerns regarding their ability to identify or fix mistakes as they went along. Most participants understood that it would be possible to have a question read more than once to make sure they heard correctly and thought it was a nice feature of the service, but this did not alleviate their fear of making mistakes.

The fact that callers would not be able to go back to previous questions to make sure they got the answers correctly was a problem for many participants. They were not necessarily reassured when told that they could hang up at any time with no information being saved if they were unsure that they had entered all information correctly. They understood that it would allow them to start over with a clean slate, but it only reinforced their impression that using the phone option would take a lot of time and effort. In line with these concerns regarding mistakes or misunderstanding, many participants said they would like to know that a live person would be available at the press of a button to provide assistance in case they encountered problems. Not having this option would make them unlikely to use the phone system.

Similarly, some participants felt uneasy about not seeing their tax return if they used this phone option. They felt that the phone version would leave them "in the dark" until they received their Notice of Assessment through the mail a few days or weeks later. Not only would they not be aware of any mistakes they might have made, but they would also not be able to see whether they would get money back or have to reimburse taxes they owed. They felt like they would lack control over the content of their tax return and it left many of them feeling insecure.

Many participants were perplexed as to how they would be able to fill out their personal information over the phone if the information provided at the start of the phone call was incorrect. This appeared like a tedious task to them, as they believed they would need to enter complete names, street numbers and other information one letter at a time using the touchtone system. They wanted to know if there was another way to verify this information before making the call, or if a voice-activated system would record their personal information so they could avoid having to type it in manually using their phone.

Another point that was raised a few times across locations related to bullet point number 8, which specified the types of income that were eligible for *File my return*. Some argued that this question should be asked at the beginning of the phone call to make sure that callers would not spend a long time on the line before being told that they were not eligible. Once raised, this objection garnered general support from other participants. This point thus appeared particularly important in light of the general belief that the phone version would take up to 15 or 20 minutes to fill out, combined with the idea that many would not qualify: "If I don't qualify, tell me right away so I don't waste my time answering all of the other questions that come before."

Interestingly, the phone option did not generate much safety concerns, aside from a couple of participants who felt that mobile phones may not be entirely safe. Compared to computers that were connected to the Internet and may be infected with viruses or hacked in other ways, participants felt



that whatever answers they would provide over the phone would be treated safely. This general sense of security was reinforced by the fact that few numbers would be shared during the phone call.

As previously mentioned in sections pertaining to the *File my return* invitation letter and the online demo version, participants once more raised a lot of questions and objections regarding their personal eligibility for this service and the possibility to include a number of deductions or credits. They would have liked to see many more options available to them to make sure they could cover all of these seemingly missing elements.

2.8 Evaluation of the Name *File My Return*

As part of the focus groups, participants were asked to provide some feedback on the suggested name for the new tax filing service: *File my return*. The vast majority of participants felt that this was a very good name for the service. It was simple, clear and identified precisely what the service was about: filing their taxes. Like the service itself, the name was viewed as simple and to the point. In French, participants also felt that the name *Produire ma déclaration* was simple and clear.

A handful of participants mentioned that maybe the word “tax” should be added to specify that the service was about filing a tax return. However, other participants felt this was unnecessary since the name would be seen in the context of CRA documentation or on the website. They preferred to leave it as is.

The name *Auto-complete* was also tested in English and French (*Auto-complété*) as an alternative to *File my return*. This name was unanimously rejected across all locations. It was not seen to necessarily relate to tax filing and was therefore viewed as unclear. Many participants spontaneously mentioned that it reminded them of the auto-fill options on various websites or the auto-correction mode on their mobile devices. This triggered a lot of negative comments because participants associated these features with typos or misspelled words, something they were especially worried about when working on their tax return.



3 Appendix

3.1.1 Quantitative Survey Methodological Report

Ipsos conducted a telephone survey with 1,259 respondents, with an average duration of 13 minutes. Fieldwork was conducted from November 14th to December 1st, 2016. The final response rate for the survey, calculated using the Marketing Research Intelligence Association's guidelines, was 8.54%. Complete call dispositions are detailed in the table below. Survey respondents were contacted at random using a list of telephone numbers provided by the Canada Revenue Agency. The target population was a subset of Canadian taxpayers, with quotas applied so that 50% of the sample were e-filers, 25% were netfilers and the final 25%, paper filers.

While the phone calls made were drawn randomly, results from this survey should not be deemed representative of the entire population of Canadian taxpayers since fixed quotas for tax filing methods and age groups were applied in making the phone calls. This was done to maximise the likelihood that respondents would match the target audience for the new tax filing service. As such, no margin of error can be applied to this research. The data were weighted to reflect the age, gender and filing method of the target population of taxpayers using statistics provided by the Canada Revenue Agency. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error and measurement error. Where figures do not sum to 100, this is due to the effects of rounding.

Call Dispositions

Disposition	Count of Disposition Outcome	Response Rate Designation (MRIA)
Asian Language Barrier	174	IS
Cell Phone	23	IS
Do Not Call – Refusal	119	IS
French Language Barrier	47	IS
General Refusal	2	IS
Hard Appointment	59	IS
Household Refusal	9186	IS
Illness/incapable/deaf	153	IS
Other Language Barrier	435	IS
Refusal Part Way Through	160	IS
Refused Before Qualified	169	IS
Soft Appointment	1098	IS
Spanish Language Barrier	17	IS
Stop	52	IS
<NOT DIALED>	74366	NA
Dialer - incomplete number	80	NA
Dialer - number barred	286	NA
Dialer - number out of order	3559	NA

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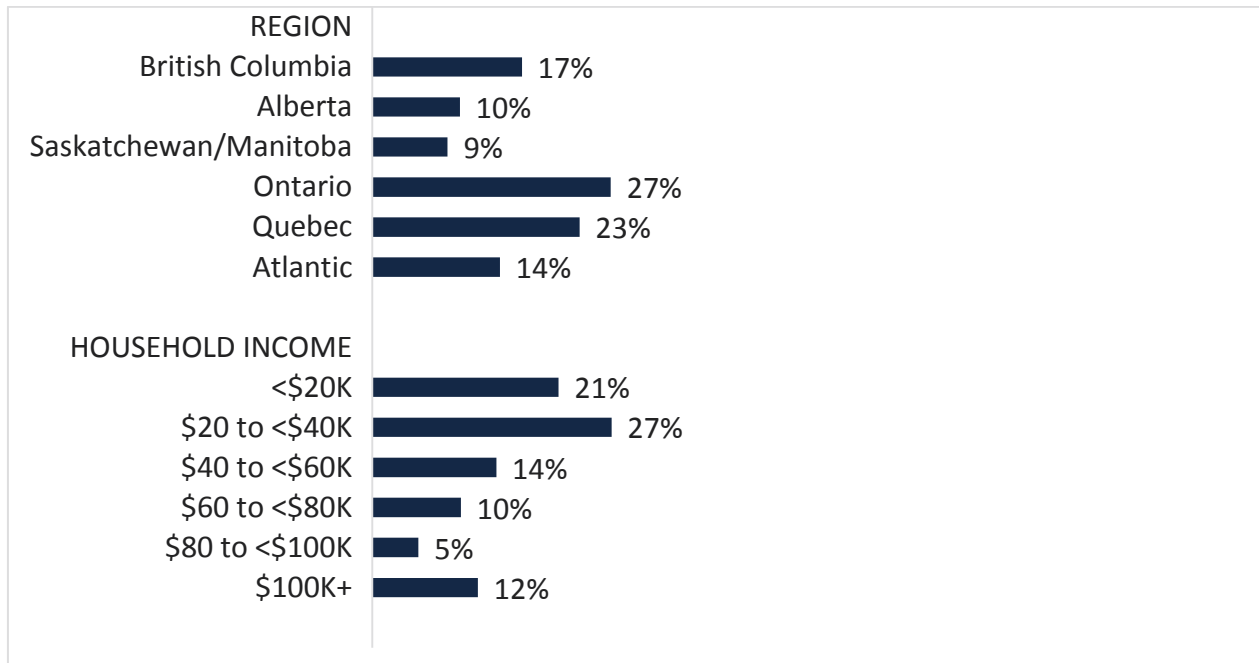
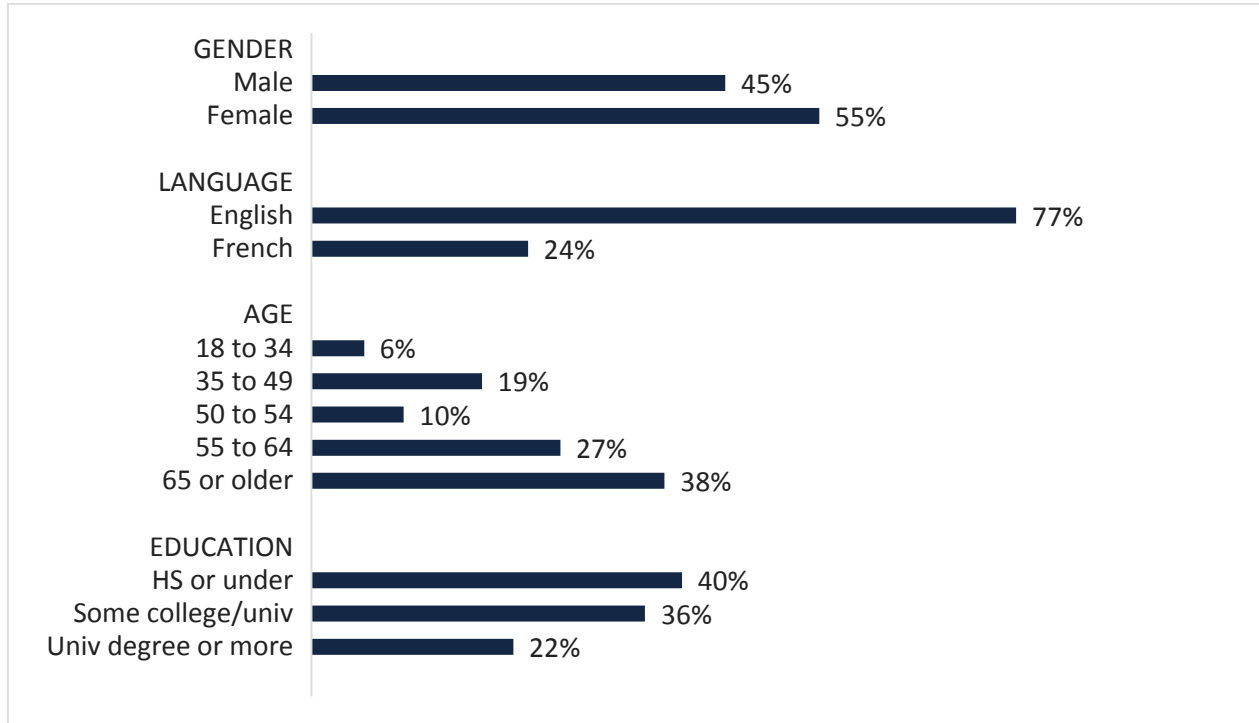
Dialer - unassigned number	6	NA
Dialer - unspecified call failure	24	NA
Disconnected number not-in-service	18	NA
Faxmodem number	89	NA
Business Number	366	R
Complete	1259	R
No one 18 or older in household	22	R
No-one in HH filed 2015 tax	7	R
Over Quota	21	R
Q2AA. No-one else interested/DK/REF	1	R
Q2b. dk/ref	10	R
QPROV. DK/REF/North	25	R
Answering Machine	4201	U
Busy	3	U
Dialer - no answer	1912	U
Dialer - nuisance hangup	86	U
Dialer - number busy	98	U
Dialer - number changed	3	U
Dialer - resource bottleneck	2	U
No answer	324	U
Grand Total	98462	

MRIA Designation	MRIA Designation Count
U	6629
IS	11694
R	1711
NA	78428

Response Rate = $R/(U+IS+R)$	8.54%
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The demographic composition of the final sample is presented in the graphs below. Figures show that the sample over-represents older individuals, as well as those with lower education and household income levels, while presenting a good distribution across all Canadian regions and official languages.

Final Sample Description



3.1.2 Qualitative Methodology

The qualitative phase of research took the form of eight, two-hour focus groups conducted in Halifax, Vancouver, London and Quebec City between November 29th and December 7th, 2016, as detailed in the table below. Groups were held at 5:30pm and 7:30pm in all locations. All participants received \$90 in appreciation for their time and effort to attend in person, with the exception of participants in Quebec City who received \$75².

Location	Time	Date
Halifax	Group 1 – 5:30pm Paper Filers	Tuesday, November 29, 2016
	Group 2 – 7:30pm Electronic Filers	
Vancouver	Group 1 – 5:30pm Paper Filers	Thursday, December 1, 2016
	Group 2 – 7:30pm Electronic Filers	
London, Ontario	Group 1 – 5:30pm Paper Filers	Monday, December 5, 2016
	Group 2 – 7:30pm Electronic Filers	
Quebec City (French)	Group 1 – 5:30pm Paper Filers	Wednesday, December 7, 2016
	Group 2 – 7:30pm Electronic Filers	

A total of 72 participants were recruited over the phone using the screening questionnaire included in this appendix. All efforts were made to recruit a full set of 80 participants (10 recruits per group), but this proved impossible in Halifax and London, where only 5 and 7 recruits respectively were secured for the paper filer groups. Of the 72 people recruited, a total of 58 attended the discussions.

Participants were recruited from a list of telephone numbers provided by the Canada Revenue Agency. Listings did not include any personal identifiers. Telephone screening was used to ensure that one group was filled with paper filers while the other group contained a good mix of e-filers and netfilers. In all groups, participants were also screened so they had an individual income of less than \$20,000 and were on fixed incomes so they would most likely be eligible for the new tax filing service assessed during the discussions. Care was also taken to ensure that each group contained a good mix of participants according to age (taking into account the need to have multiple retirees in each group), gender, ethnicity and education levels. Focus group participants were selected according to the Standards for the Conduct

² The original incentive was \$75 but due to difficulties in recruiting participants, the incentive was increased to \$90 part-way through recruitment.



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of Government of Canada Public Opinion Qualitative Research. It should be noted that the qualitative findings cannot be generalized to a larger population, and that they should be considered directional only.

Focus groups were led by an Ipsos senior research professional using a discussion guide that was developed by Ipsos in collaboration with the Project Authority at the Canada Revenue Agency. The complete discussion guide is included in this appendix.



3.1.3 Quantitative Survey Instrument

3.1.3.1 English Version

CRA – Meeting the Government of Canada Service Mandate FINAL Questionnaire

[INTRODUCTION]

Hello/Bonjour, my name is _____. I'm calling on behalf of Ipsos, a national research firm. We are conducting a brief study on behalf of the Canada Revenue Agency regarding the services it offers to Canadian taxpayers. This call may be monitored or recorded for quality control purposes. Would you prefer that I continue in English or French? (IF NEEDED: Je vous remercie. Quelqu'un vous rappellera bientôt pour mener le sondage en français.)

We need to speak with a person in your household who is responsible in full or in part for preparing and submitting their tax returns or those of other members of your household. Would you be that person or one of those persons? (IF NO/DK/REF THANK & ASK TO SPEAK TO ANOTHER MEMBER OF THE HOUSEHOLD WHO IS RESPONSIBLE FOR FILING HIS OR HER INCOME TAXES; IF NO ONE ELSE IS AVAILABLE, THANK AND TERMINATE)

Yes - CONTINUE

No - ASK TO SPEAK TO 'ELIGIBLE' PERSON AND START AGAIN

REFUSED - THANK AND TERMINATE

[SCREEN BREAK]

The survey should take about 10 minutes of your time. Your responses will be kept entirely confidential and anonymous. Your decision to participate is voluntary and will in no way affect your relationship with the Canada Revenue Agency or the Government of Canada. This survey is registered with the Marketing Research and Intelligence Association (MRIA) and the information provided will be administered according to the requirements of the Privacy Act. If at any time during the survey you would prefer not to answer a specific question, you are allowed to do so.

(IF CRA CONTACT / VERIFICATION REQUESTED: YYYYYY, at XXXXXXXX.)

1-Continue

LANG. (DO NOT READ) CHOOSE LANGUAGE

English

French

AGE_SCREEN. Are you 18 years of age or older?

Yes

No



[IF AGE_SCREEN=NO/DK/REF THANK & TERMINATE; OTHERWISE CONTINUE]

AGE1. In what year were you born? (RECORD YEAR)

[1900-1998]

[IF AGE1=DK/REF, ASK AGE2; OTHERWISE SKIP TO PROV]

AGE2. Would you be willing to tell me in which of the following age categories you belong? (READ LIST UNTIL INTERRUPTED, ACCEPT ONE RESPONSE)

18 to 34
35 to 49
50 to 54
55 to 64
65 or older

[AT AGE2 ALLOW DK/REF RESPONSES]

PROV. In which province or territory do you live? (Read list if necessary)

British Columbia
Alberta
Saskatchewan
Manitoba
Ontario
Quebec
New Brunswick
Nova Scotia
PEI (Prince Edward Island)
Newfoundland and Labrador
Yukon
North West Territories
Nunavut

[IF PROV = DK/REF, 'Yukon', 'North West Territories', 'Nunavut' THANK & TERMINATE; OTHERWISE CONTINUE]

GENDR. (DO NOT ASK. RECORD GENDER BASED ON INTERVIEWER OBSERVATION.)

Male
Female

SECTION I - TAX PREPARATION AND FILING METHOD

I would now like to ask you a few questions regarding your tax preparation and filing habits. Please be assured that all of your answers will remain confidential.

Q1. Canadians can either prepare their income taxes on their own, they can get assistance from family and friends or they can hire an accountant or a tax preparation company such as H&R Block. How frequently would you say you prepare your tax return on your own? (READ LIST; SINGLE MENTION)

Always
Sometimes
Rarely
Never

Q2A. Which of the following best represents how your 2015 income tax return was prepared? (READ LIST – SINGLE MENTION)

You prepared it on your own.
You prepared it with the assistance of a family member or a friend.
It was prepared by a volunteer through the Community Volunteer Income Tax Program.
It was prepared by an accountant or a tax preparation company such as H&R Block?
(DO NOT READ) I did not submit an income tax return last year

[IF Q2A = "I did not submit an income tax return last year" OR "DK/REF" ASK Q2AA]

[IF Q2A = "You prepared it on your own" or "You prepared it with the assistance of a family member, a friend or a volunteer" CONTINUE TO Q2B]

[If Q2A = "It was prepared by a volunteer through the Community Volunteer Income Tax Program", SKIP TO QS1]

[If Q2A = "It was prepared by an accountant or a tax preparation company", SKIP TO QE1]

Q2AA. Is there someone else in the household who prepared and filed their 2015 income tax?

Yes – Available now (REPEAT INTRODUCTION) [RE-ROUTE TO INTRODUCTION]

Yes – Not Available, callback (CALLBACK) [RE-ROUTE TO CALLBACK]

No-one else prepared and filed 2015 income tax (Thank & Terminate) [DISQUALIFER – No-one in HH filed 2015 tax]

No-one else interested in participating (Thanks & Terminate) [REFUSAL]

Q2B. How was your income tax return submitted last year? Was it submitted on paper, or was it submitted electronically over the Internet (*if necessary, specify: using Netfile*)? (SINGLE MENTION)

On paper
Electronically/over the Internet (Netfile)

[IF Q2B = "On paper", ASK Q3 THEN SKIP TO QP1]

[IF Q2B = "Electronically/Internet", ASK Q3 THEN SKIP TO QN1]

[IF Q2B = DK/REF, THANK AND TERMINATE]



Q3. Have you ever used the services of an accountant or a tax preparation service such as H&R Block?

Yes

No

IF Q2A=(4) 'It was prepared by an accountant or a tax preparation company' THEN FILING METHOD QUOTA (nb4) = 01=eFile

If Q2A= (3) 'It was prepared by a volunteer through the Community Volunteer Income Tax Program' THEN FILING METHOD QUOTA (nb4) = 01=eFile

IF Q2B=(2) 'Electronically/Internet' THEN FILING METHOD QUOTA (nb4) = 02-Netfile

IF Q2B=(1) 'On paper' THEN FILING METHOD QUOTA (nb4) = 03-Paper

SECTION II – PAPER FILERS

QP1. What are the main reasons why you submitted your income tax return on paper last year rather than electronically? (PROBE UP TO 3 TIMES; CLARIFY VAGUE RESPONSES)

[OPEN END]

QP2. Have you ever submitted your tax return electronically?

Yes

No

[IF QP2 = YES, ASK QP3; OTHERWISE CONTINUE TO QP4]

QP3. And, when you submitted your tax return electronically, how did you find the process? Was it ...? (READ LIST)

Very convenient

Somewhat convenient

Somewhat inconvenient, or

Very inconvenient

QP4. There are a number of reasons why someone may prefer to submit their taxes on paper instead of electronically or online. Please indicate whether each of the following is a major reason, a minor reason or not a reason at all in explaining why you chose not to submit your taxes electronically or online last year. (Read list as necessary)

[RANDOMIZE]

The software needed is too expensive.

You are not very comfortable using computers or the Internet.

You have no or limited access to the Internet at home.

You enjoy submitting taxes on paper.

You don't know where to find the information regarding electronic filing.

You simply never thought about it.

You have security concerns at the idea of sharing your personal information over the Internet.
You are used to submitting taxes on paper and don't see a need to change.
You heard from friends or family that it was complicated.
You are worried you might lose the information you entered and have to start over.
You want control of what is included in your tax return and are not comfortable with the software.
You are concerned about the possibility of making a mistake or skipping important information.
You are concerned with the possibility that you may not take advantage of all the benefits and deductions available.

Major reason
Minor reason
Not a reason at all

QP5. How open would you be to the idea of submitting your taxes electronically in the future? Would you be...? (READ LIST)

Very open
Somewhat open
Somewhat reluctant, or
Very reluctant

[SKIP TO PREAMBLE BEFORE QS1]

SECTION III – NETFILE USERS

QN1. When you filed your tax return electronically last year, how did you find the process? Was it...? (READ LIST)

Very convenient
Somewhat convenient
Somewhat inconvenient, or
Very inconvenient

QN2. Approximately how many years ago did you start filing your taxes electronically? (Interviewer instruction: If less than one year enter as 1)

[1-30]

QN3. Please indicate whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements regarding the electronic filing of your tax return.

[RANDOMIZE]

The price of the software used is reasonable.
You are very comfortable using computers or the Internet.
You have reliable access to the Internet from home.
It was easy to find the information needed to file electronically.
You were comfortable sharing your personal information over the Internet.

The process was relatively simple overall.
You were confident that the information you entered would not be lost.
You were confident that you would not make a mistake or skip important information.
You were confident that you would take advantage of all the benefits and deductions available.

Strongly agree
Somewhat agree
Somewhat disagree
Strongly disagree

[SKIP TO PREAMBLE BEFORE QS1]

SECTION IV – EFILE USERS

[ASK QE1 If Q2A = “It was prepared by an accountant or a tax preparation company” OTHERWISE SKIP TO PREAMBLE FOR QS1]

QE1. You mentioned that you used the services of an accountant or a tax preparation firm such as H&R Block to prepare and file your taxes last year. How satisfied were you with the services you received? Would you say you were...? (READ LIST)

Very satisfied
Somewhat satisfied
Somewhat dissatisfied, or
Very dissatisfied

QE2. Please indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements about using the services of an accountant or a tax preparation company last year.

[RANDOMIZE]

You were confident that your privacy would be protected.
The cost of the services was reasonable.
The services were provided in a timely manner.
You were confident that the person assigned to your file was fully-qualified to do the work.
You were provided with all of the information you needed throughout the process.
The process was relatively simple overall.
You were confident that the person assigned to your file would not make a mistake or skip important information.
You were confident that you would take advantage all the benefits and deductions available.

Strongly agree
Somewhat agree
Somewhat disagree
Strongly disagree



QE3. Have you ever prepared and filed your taxes on your own in previous years?

Yes

No

[IF YES AT QE3, CONTINUE; OTHERWISE SKIP TO PREAMBLE BEFORE QS1]

QE4. And, approximately how many years ago did you start using the services of a tax preparation company or an accountant? (Interviewer instruction: If less than one year enter as 1)

[1-50]

QE5. Please indicate whether each of the following is a major reason, a minor reason or not a reason at all in explaining why you started using the services of an accountant or a tax preparation company to help with your tax return. (Repeat scale as necessary)

[RANDOMIZE]

You found the process of preparing and filing your tax return on your own too time consuming.

You found the process of preparing and filing your tax return on your own too complicated.

You were concerned about the possibility of making a mistake or skipping important information.

You were concerned with the possibility that you may not take advantage of all the benefits and deductions available.

Your financial situation got more complex.

You could now afford the expense.

The service was recommended by a friend or family member.

Major reason

Minor reason

Not a reason at all



SECTION V – VIEWS ON NEW SERVICE

(PREAMBLE – READ ALL)

I would now like to ask you a few questions regarding a new service that could be offered to Canadian taxpayers by the Canada Revenue Agency. This new service would provide direct tax filing assistance to Canadians so they could file their tax returns online or over the phone through an automated system by answering simple yes/no questions without the need for any calculations on the part of the taxpayer. This service would be offered at no charge to eligible Canadians who have consistent and simple sources of income from one year to the next.

QS1. If you were eligible, how interested would you be in switching from your current filing method to this new service from the Canada Revenue Agency (repeat description from above if necessary)? Would you be...? (READ LIST)

Very interested
Somewhat interested
Not very interested, or
Not interested at all

[IF “VERY” OR “SOMEWHAT INTERESTED” AT QS1, ASK QS2 AND THEN SKIP TO QS4]

[IF “NOT VERY INTERESTED” OR “NOT INTERESTED AT ALL” AT QS1, SKIP TO QS3]

[IF “DK/REFUSED” AT QS1, SKIP TO QS4]

QS2. Why is this an interesting offer for you? (PROBE UP TO 3 TIMES; CLARIFY VAGUE RESPONSES)

[OPEN END]

QS3. Why is this not an interesting offer for you? (PROBE UP TO 3 TIMES; CLARIFY VAGUE RESPONSES)

[OPEN END]

QS4. Please indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the following statements regarding this new service. Is that strongly or somewhat?

[RANDOMIZE]

The fact that it would be free makes it appealing.

This new service would make it more difficult to file my tax return.

The fact that it would be provided by the Canada Revenue Agency makes me confident that my personal information would be safe and secure.

The fact that it would be provided by the Canada Revenue Agency makes me confident that my tax return would be accurate.

The fact that this service would be provided by the Canada Revenue Agency makes me think that it will be easy to use.

I would be worried that I would miss important deductions.

This new service would probably be suitable for my personal financial situation.

I want control of what is included in my tax return and this service may be too limiting.



Strongly agree
Somewhat agree
Somewhat disagree
Strongly disagree

[IF "NOT INTERESTED AT ALL" AT QS1, SKIP TO D1]

QS5. If you could choose one, would you prefer to access this service online or over the phone through an automated system?

Online
Over the phone through an automated system
Neither (Do not read)

QS6. Have you registered with the Canada Revenue Agency's MyAccount online service? MyAccount is an online service that allows you to track your refund, view or change your return, check your benefit and credit payments, view your RRSP limit, set up direct deposit, and receive online mail among other things.

Yes
No

[IF QS5 = ONLINE ASK QS7; OTHERWISE SKIP TO QS8]

QS7. You said you would prefer to access this new service online. Would that be using MyAccount or the MyCRA app for mobile devices? (REPEAT LIST – SINGLE ANSWER)

MyAccount
MyCRA mobile app
Both (Do not read)
Neither (Do not read)

[IF QS6 = "NO" OR "DK/REF" ASK QS8; OTHERWISE SKIP TO QS9]

QS8. Would this new service make you to register to the CRA's MyAccount online service?

Yes
No
(DO NOT READ) Maybe

QS9. If you could use this new service, would you prefer to be notified of your eligibility each year, or only notified when or if you no longer qualify?

Each year
When or if I no longer qualify



QS10. In your opinion, what is the best way to inform taxpayers, such as yourself, about this new service? Should they be notified via ...? (READ LIST IN FULL – ALLOW FOR UP TO THREE RESPONSES)

[RANDOMIZE – MULTI-PUNCH, ACCEPT UP TO THREE RESPONSES]

Secure online correspondence available in MyAccount

A letter through the mail

A mention in your Notice of Assessment

On social media (Facebook, Twitter, etc.)

Television advertising

Radio advertising

Newspaper advertising

Any other, please specify(ONE RESPONSE ONLY): **[OPEN END - ANCHOR SECOND LAST]**

(Do not read) None of the above **[ANCHOR LAST, MUTUALLY EXCLUSIVE]**

QS11. How often do you access the Internet? (READ LIST)

Many times a day

Once a day

A few times a week

Once a week

Less than once a week

I don't use the Internet

[DEMOGRAPHICS]

To finish, I'd like to ask you some questions for statistical purposes only. Please be assured that your answers will remain completely confidential.

D1. Could you please provide the first three digits of your postal code?

[INSERT FSA MODULE, IF DK/REF CONTINUE]

D2. What is the highest level of formal education that you have completed?
(READ LIST UNTIL INTERRUPTED, ACCEPT ONE RESPONSE)

Grade 8 or less

Some high school

High School diploma or equivalent

Registered Apprenticeship or other trades certificate or diploma

College, CEGEP or other non-university certificate or diploma

University certificate or diploma below bachelor's level

Bachelor's degree

Post graduate degree above bachelor's level



D3. Which of the following categories best describes your current employment status? Are you...?
(READ LIST UNTIL INTERRUPTED, ACCEPT ONE RESPONSE)

- Working full-time, that is, 35 or more hours per week
- Working part-time, that is, less than 35 hours per week
- Self-employed
- Unemployed, but looking for work
- A student attending school full-time
- Retired
- Not in the workforce (full-time homemaker, unemployed, not looking for work)
- (DO NOT READ) Other – (DO NOT SPECIFY)
- (DO NOT READ) Refused

D4. Which of the following categories best describes your total household income? That is, the total income of all persons in your household combined, before taxes? (READ LIST UNTIL INTERRUPTED)

- Under \$20,000
- \$20,000 to just under \$40,000
- \$40,000 to just under \$60,000
- \$60,000 to just under \$80,000
- \$80,000 to just under \$100,000
- \$100,000 to just under \$150,000
- \$150,000 and above

D5. What language do you speak most often at home? (READ LIST — ACCEPT ALL THAT APPLY)

- English
- French
- Other (specify)[SPECIFY:]

D6. Were you born in Canada?

- Yes
- No

[ASK D7 IF D6=NO; OTHERWISE SKIP TO D8]

D7. In what year did you come to Canada? (RECORD YEAR; ASK FOR APPROXIMATION IF THEY CAN'T REMEMBER)

[1900-2016]

D8. Are you an Aboriginal person, that is, First Nations, Métis or Inuk (IF NEEDED: Inuit)? First Nations includes Status and Non-Status Indians.
(NOTE: ABORIGINALS ASKED SEPARATELY, IN LINE WITH STATISTICS CANADA APPROACH)

- Yes
- No



[IF FSA PROVIDED AT D1 IS INCLUDED IN THE GREATER VANCOUVER AREA, THE GREATER LONDON AREA, THE GREATER QUEBEC CITY AREA OR THE HALIFAX AREA, ASK FOCUS]

FOCUS. In the next few weeks we will be conducting focus group discussions with residents of your area to expand on the results of the survey. Once more, your participation would remain entirely confidential and would be completely voluntary. Participants would receive a 75\$ compensation for attending. Would you be interested in taking part?

Yes

No

[IF YES, ASK CONTACT1, OTHERWISE SKIP TO SURVEY CLOSE]

CONTACT1. Could I please confirm your name so we can call you back and provide you with the details of the focus group? *(If needed, remind participants: This information will not be provided to the Government of Canada and will be kept confidential.)*

Enter name:

[OPEN END]

CONTACT2. Could I please confirm your phone number *(If needed, remind participants: This information will not be provided to the Government of Canada and will be kept confidential.)*

Enter phone number:

[OPEN END PHONE FIELD – DO NOT ALLOW DK/REF]

END. That concludes the survey. Thank you very much for your feedback. It is much appreciated. On behalf of myself, Ipsos, and the Government of Canada, have a good (day/evening).



3.1.3.2 French Version

ARC – S'acquitter du mandat de services du gouvernement du Canada

Questionnaire DÉFINITIF

[INTRODUCTION]

Bonjour/Hello, mon nom est _____. Je vous appelle de la part d'Ipsos, une entreprise de recherche d'envergure nationale. Nous menons actuellement une courte étude au nom de l'Agence du revenu du Canada sur les services offerts aux contribuables canadiens. Cet appel pourrait être enregistré pour des fins de contrôle de la qualité. Aimerez-vous que je poursuive en français ou en anglais? (AU BESOIN : Thank you. Someone will call you back soon to complete the survey in English.)

TAX_SCREEN. Nous devons nous adresser à la personne de votre ménage qui est responsable, en tout ou en partie, de la préparation et de la soumission de sa déclaration de revenus ou de celles des autres membres de votre ménage. S'agit-il de vous ou d'une autre de ces personnes?

Oui - POURSUIVRE.

Non - DEMANDER À PARLER À UNE PERSONNE ADMISSIBLE ET RECOMMENCER.

REFUS - REMERCIER LE RÉPONDANT ET METTRE FIN À L'APPEL.

[SI LA RÉPONSE À TAX_SCREEN = NON/NE SAIS PAS/REFUS DE RÉPONDRE, DEMANDER À PARLER À UN AUTRE MEMBRE DU MÉNAGE QUI EST RESPONSABLE DE LA PRODUCTION DE SA DÉCLARATION DE REVENUS, ET SI PERSONNE D'AUTRE N'EST DISPONIBLE, REMERCIER LE RÉPONDANT ET METTRE FIN À L'APPEL]

Le sondage dure environ 10 minutes. Vos réponses resteront strictement confidentielles et anonymes. La participation à cette étude est volontaire et votre décision d'y participer ou non n'aura aucune incidence sur votre relation avec l'Agence du revenu du Canada ou le gouvernement du Canada. Ce sondage est enregistré auprès de l'Association de la recherche et de l'intelligence marketing (ARIM). Les renseignements qu'il contient seront traités conformément aux exigences de la *Loi sur la protection des renseignements personnels*. Vous êtes libre de choisir de ne pas répondre à une question au cours du sondage.

LANG. (NE PAS LIRE CETTE OPTION) CHOISIR LA LANGUE

Anglais

Français

AGE_SCREEN. Êtes-vous âgé de 18 ans et plus?

Oui

Non

[SI LA RÉPONSE À AGE_SCREEN = NON/NE SAIS PAS/REFUS DE RÉPONDRE, REMERCIER LE RÉPONDANT ET METTRE FIN À L'APPEL, SINON POURSUIVRE]

AGE1. En quelle année êtes-vous né? (INDIQUER L'ANNÉE)

[1900-1998]

[SI LA RÉPONSE À AGE1 = NE SAIS PAS/REFUS DE RÉPONDRE, POSER LA QUESTION AGE2; SINON, PASSER À LA QUESTION PROV.]

AGE2. Seriez-vous disposé à me dire à quelle catégorie d'âge vous appartenez? (LIRE LA LISTE À MOINS QUE LE RÉPONDANT FOURNISSE SA RÉPONSE AVANT LA FIN DE LA LISTE; ACCEPTER UNE RÉPONSE)

De 18 à 34 ans

De 35 à 49 ans

De 50 à 54 ans

De 55 à 64 ans

65 ans et plus

PROV. Dans quelle province ou quel territoire vivez-vous?

Colombie-Britannique

Alberta

Saskatchewan

Manitoba

Ontario

Québec

Nouveau-Brunswick

Nouvelle-Écosse

Île-du-Prince-Édouard (IPE)

Terre-Neuve et Labrador



Yukon

Territoires du Nord-Ouest

Nunavut

[SI LA RÉPONSE À PROV. = NON/NE SAIS PAS/REFUS DE RÉPONDRE, REMERCIER LE RÉPONDANT ET METTRE FIN À L'APPEL, SINON POURSUIVRE]

GENDR. (NE PAS POSER LA QUESTION. RÉPONSE EN FONCTION DE L'OBSERVATION DE L'INTERVIEWEUR)

Homme

Femme

SECTION I – MÉTHODE DE PRODUCTION ET DE TRANSMISSION DE LA DÉCLARATION DE REVENUS

J'aimerais maintenant vous poser quelques questions sur vos habitudes en matière de préparation et de production de déclarations de revenus. Je tiens à vous rappeler que toutes vos réponses seront tenues confidentielles.

Q1. Les Canadiens préparent leur déclaration de revenus soit par eux-mêmes, avec l'aide d'un membre de leur famille ou d'un ami ou en faisant appel à un comptable ou à une entreprise qui se charge de la préparer pour eux, comme H&R Block. À quelle fréquence préparez-vous vous-même votre déclaration de revenus? (LIRE LA LISTE UNE SEULE FOIS)

Toujours

Parfois

Rarement

Jamais

Q2A. Parmi les réponses suivantes, laquelle correspond le mieux à la façon dont votre déclaration de revenus a été préparée en 2015? (LIRE LA LISTE UNE SEULE FOIS)

Vous l'avez préparée vous-même.

Vous l'avez préparée avec l'aide d'un membre de votre famille ou d'un ami.

Elle a été préparée par un bénévole du Programme communautaire des bénévoles en matière d'impôt.



Elle a été préparée par un comptable ou par une entreprise de préparation de déclarations comme H&R Block.

(NE PAS LIRE) Je n'ai pas soumis de déclaration de revenus l'année dernière.

[SI LA RÉPONSE À LA Q2A = « Je n'ai pas soumis de déclaration de revenus l'année dernière ou NE SAIS PAS/REFUS DE RÉPONDRE, PASSER À LA QUESTION Q2AA]

[SI LA RÉPONSE À LA Q2A = « Vous l'avez préparée vous-même. » ou « Vous l'avez préparée avec l'aide d'un membre de votre famille ou d'un ami. », PASSER À LA QUESTION Q2B]

[SI LA RÉPONSE À LA Q2A = « Elle a été préparée par un bénévole du Programme communautaire des bénévoles en matière d'impôt. », PASSER À LA QUESTION QS1]

[SI LA RÉPONSE À LA Q2A = « Elle a été préparée par un comptable ou par une entreprise de préparation de déclarations comme H&R Block. », PASSER À LA QUESTION QE1]

Q2AA. Y a-t-il quelqu'un d'autre dans votre foyer qui a préparé et soumis une déclaration de revenus en 2015?

Oui – Disponible maintenant (RÉPÉTER INTRODUCTION) [RÉACHEMINER VERS INTRODUCTION]

Oui – Pas disponible maintenant (RAPPEL) [RÉACHEMINER VERS RAPPEL]

Personne d'autre n'a préparé ou soumis une déclaration de revenu en 2015 (Remercier et terminer) [DISQUALIFIÉ – Personne n'a soumis de déclaration de revenu en 2015]

Personne d'autre n'est intéressé à participer (Remercier et terminer) [REFUS]

Q2B. De quelle façon avez-vous soumis votre déclaration de revenus l'année dernière? Était-ce sur papier ou par voie électronique sur Internet (*au besoin, préciser* : au moyen d'IMPÔTNET)? (LIRE UNE SEULE FOIS)

Sur papier

Par voie électronique/par Internet (IMPÔTNET)

[SI LA RÉPONSE À LA Q2B = « Sur papier », POSER LA Q3, PUIS PASSER À LA QP1]

[SI LA RÉPONSE À LA Q2B = « Par voie électronique/par Internet », POSER LA Q3, PUIS PASSER À LA QN1]

Q3. Avez-vous déjà utilisé les services d'un comptable ou d'une entreprise de préparation de déclarations comme H&R Block?

Oui

Non



SECTION II – DÉCLARANTS PAR SUPPORT PAPIER

QP1. Quelles sont les principales raisons pour lesquelles vous avez soumis votre déclaration de revenus sur papier plutôt que par voie électronique l'année dernière? (SONDER JUSQU'À TROIS FOIS; DEMANDER DES PRÉCISIONS SI LES RÉPONSES SONT VAGUES)

[QUESTION OUVERTE]

QP2. Avez-vous déjà soumis votre déclaration de revenus par voie électronique?

Oui

Non

[SI LA RÉPONSE À LA QP2 = OUI, PASSER À LA QP3; SINON, PASSER À LA QP4]

QP3. Et lorsque vous avez soumis votre déclaration de revenus par voie électronique, comment avez-vous trouvé le processus? Était-il...? (LIRE LA LISTE)

Très pratique

Assez pratique

Peu pratique

Très peu pratique

QP4. Il existe de nombreuses raisons pour lesquelles une personne préfère soumettre sa déclaration de revenus sur papier plutôt que par voie électronique ou en ligne. Veuillez indiquer si chacun des énoncés suivants est une raison principale, une raison secondaire ou n'est pas une raison qui explique pourquoi vous avez choisi de ne pas soumettre votre déclaration de revenus par voie électronique ou en ligne l'année dernière.

[CHOISIR DES ÉNONCÉS ALÉATOIREMENT]

- a. Le logiciel nécessaire est trop coûteux.
- b. Vous n'êtes pas très à l'aise avec l'utilisation d'ordinateurs ou d'Internet.
- c. Vous ne disposez d'aucun accès ou disposez uniquement d'un accès précaire à Internet à la maison.
- d. Vous aimez soumettre vos déclarations de revenus sur papier.
- e. Vous ne savez pas où trouver les renseignements concernant la transmission électronique des déclarations.
- f. Vous n'y avez simplement jamais pensé.
- g. Vous êtes préoccupé par la sécurité des renseignements personnels que vous transmettez par Internet.
- h. Vous êtes habitué de soumettre votre déclaration de revenus sur papier et ne voyez pas la nécessité de changer.
- i. Vous avez entendu des amis ou des membres de votre famille dire que c'est compliqué.

- j. Vous craignez de perdre les renseignements que vous avez saisis et d'avoir à recommencer.
- k. Vous voulez contrôler ce qui est inclus dans votre déclaration de revenus, et vous n'êtes pas très à l'aise avec le logiciel.
- l. Vous craignez de faire une erreur ou de laisser passer un renseignement important.
- m. Vous craignez de ne pas tirer profit de toutes les prestations et déductions disponibles.

Raison principale

Raison secondaire

Pas une raison

QP5. Jusqu'à quel point seriez-vous ouvert à l'idée de soumettre votre déclaration de revenus par voie électronique? Seriez-vous...? (LIRE LA LISTE)

Très ouvert

Plutôt ouvert

Plutôt réticent

Très réticent

[PASSER AU PRÉAMBULE DE LA SECTION V]



SECTION III – UTILISATEURS D'IMPÔTNET

QN1. Lorsque vous avez produit votre déclaration de revenus par voie électronique l'année dernière, comment avez-vous trouvé le processus? Était-il...? (LIRE LA LISTE)

Très pratique

Assez pratique

Peu pratique

Très peu pratique

QN2. Depuis combien d'années environ produisez-vous vos déclarations de revenus par voie électronique?

[1-30]

QN3. Veuillez indiquer dans quelle mesure vous êtes d'accord ou en désaccord avec les énoncés suivants se rapportant à la transmission électronique de votre déclaration de revenus. Serait-ce tout à fait ou plutôt?

[CHOISIR DES ÉNONCÉS ALÉATOIREMENT]

- a. Le prix du logiciel utilisé est raisonnable.
- b. Vous êtes très à l'aise avec l'utilisation d'ordinateurs ou d'Internet.
- c. Vous avez un accès fiable à Internet à partir de la maison.
- d. Il vous a été facile de trouver les renseignements dont vous aviez besoin pour produire votre déclaration par voie électronique.
- e. Vous étiez confortable à l'idée de partager vos renseignements personnels par Internet.
- f. Dans l'ensemble, le processus était relativement simple.
- g. Vous étiez confiant que les renseignements que vous aviez saisis ne seraient pas perdus.
- h. Vous étiez confiant de ne pas faire d'erreur ou de ne pas laisser passer un renseignement important.
- i. Vous étiez confiant de tirer profit de toutes les prestations et déductions disponibles.

Tout à fait d'accord

Plutôt d'accord

Plutôt en désaccord

Tout à fait en désaccord

[PASSER AU PRÉAMBULE DE LA SECTION V]



SECTION IV – UTILISATEURS DE LA TRANSMISSION ÉLECTRONIQUE DES DÉCLARATIONS

QE1. Vous avez mentionné avoir utilisé les services d'un ou une comptable ou d'une entreprise de préparation de déclarations comme H&R Block pour préparer et produire votre déclaration de l'année dernière. Dans quelle mesure avez-vous été satisfait des services que vous avez reçus. Diriez-vous que vous étiez...? (LIRE LA LISTE)

Très satisfait

Plutôt satisfait

Plutôt insatisfait

Très insatisfait

QE2. Veuillez indiquer dans quelle mesure vous êtes d'accord ou en désaccord avec les énoncés suivants se rapportant à l'utilisation des services d'un ou d'une comptable ou d'une entreprise de préparation de déclarations l'année dernière. Serait-ce tout à fait ou plutôt?

[CHOISIR DES ÉNONCÉS ALÉATOIREMENT]

- a. Vous étiez confiant que vos renseignements personnels seraient protégés.
- b. Le coût des services était raisonnable.
- c. Les services ont été fournis dans un délai raisonnable.
- d. Vous étiez confiant que la personne à laquelle votre dossier avait été attribué était tout à fait qualifiée.
- e. Tout au long du processus, l'on vous a communiqué tous les renseignements dont vous aviez besoin.
- f. Dans l'ensemble, le processus était relativement simple.
- g. Vous étiez confiant que la personne à laquelle votre dossier avait été attribué ne ferait pas d'erreur ou qu'elle ne laisserait pas passer un renseignement important.
- h. Vous étiez confiant de tirer profit de toutes les prestations et déductions disponibles.

Tout à fait d'accord

Plutôt d'accord

Plutôt en désaccord

Tout à fait en désaccord

QE3. Avez-vous déjà préparé et produit votre déclaration vous-même au cours des années précédentes?



Oui

Non

[SI LA RÉPONSE À LA QUESTION QE3 EST OUI, CONTINUER, SINON PASSER AU PRÉAMBULE DE LA SECTION V]

QE4. Depuis combien d'années environ utilisez-vous les services d'une entreprise de préparation de déclarations ou d'un ou d'une comptable.

[1-50]

QE5. Veuillez indiquer si chacun des énoncés suivants est une raison principale, une raison secondaire ou n'est pas une raison qui explique pourquoi vous avez commencé à utiliser les services d'un ou d'une comptable ou d'une entreprise de préparation de déclarations pour vous aider à produire votre déclaration de revenus.

[CHOISIR DES ÉNONCÉS ALÉATOIREMENT]

- a. Vous trouviez que le processus de préparation et de production de votre déclaration de revenus par vous-même prenait trop de temps.
- b. Vous trouviez que le processus de préparation et de production de votre déclaration de revenus par vous-même était trop compliqué.
- c. Vous craigniez de faire une erreur ou de laisser passer un renseignement important.
- d. Vous craigniez de ne pas tirer profit de toutes les prestations et déductions disponibles.
- e. Votre situation financière était devenue plus complexe.
- f. Vous pouviez vous permettre cette dépense.
- g. Le service vous avait été recommandé par un ami ou un membre de la famille.

Raison principale

Raison secondaire

Pas une raison

SECTION V – OPINIONS SUR LE NOUVEAU SERVICE

(PRÉAMBULE – LIRE EN ENTIER)

J'aimerais maintenant vous poser quelques questions au sujet d'un nouveau service que l'Agence du revenu du Canada pourrait offrir aux contribuables canadiens. Ce nouveau service offrirait une aide directe aux Canadiens et aux Canadiennes pour la production de leur déclaration de revenus en permettant aux contribuables de produire leur déclaration en ligne ou par téléphone grâce à un système automatisé en répondant simplement par oui ou par non à des questions sans avoir besoin d'effectuer le moindre

calcul. Ce service serait offert gratuitement aux Canadiens et aux Canadiennes admissibles dont les sources de revenus sont simples et ne varient pas d'une année à l'autre.

QS1. Si vous étiez admissible, dans quelle mesure seriez-vous intéressé à abandonner votre méthode de déclaration actuelle pour utiliser ce nouveau service offert par l'Agence du revenu du Canada (répéter la déclaration ci-dessus au besoin)? Seriez-vous...? (LIRE LA LISTE)

Très intéressé

Plutôt intéressé

Pas très intéressée

Pas du tout intéressé

[SI LA RÉPONSE À QS1 EST « TRÈS INTÉRESSÉ » OU « PLUTÔT INTÉRESSÉ », POSER QS2 PUIS PASSER À QS4]

[SI LA RÉPONSE À QS1 EST « PAS TRÈS INTÉRESSÉ » OU « PAS DU TOUT INTÉRESSÉ », PASSER À QS3]

[SI « NE SAIS PAS/REFUS DE RÉPONDRE » À QS1, PASSER À QS4]

QS2. Pourquoi cette offre vous paraît-elle intéressante? (SONDER JUSQU'À TROIS FOIS; DEMANDER DES PRÉCISIONS SI LES RÉPONSES SONT VAGUES)

[QUESTION OUVERTE]

QS3. Pourquoi cette offre ne vous paraît-elle pas intéressante? (SONDER JUSQU'À TROIS FOIS; DEMANDER DES PRÉCISIONS SI LES RÉPONSES SONT VAGUES)

[QUESTION OUVERTE]

QS4. Veuillez indiquer dans quelle mesure vous êtes d'accord ou en désaccord avec les énoncés suivants se rapportant à ce nouveau service. Serait-ce tout à fait ou plutôt?

[CHOISIR DES ÉNONCÉS ALÉATOIREMENT]

- a. Le fait qu'il soit gratuit le rend attrayant.
- b. Ce nouveau service pourrait rendre plus difficile la production de ma déclaration de revenus.
- c. Le fait que le service soit offert par l'Agence du revenu du Canada me rassure à l'idée que mes renseignements personnels seront protégés et que leur confidentialité sera sauvegardée.
- d. Le fait que le service soit offert par l'Agence du revenu du Canada me rassure à l'idée que ma déclaration de revenus sera exacte.
- e. Le fait que le service soit offert par l'Agence du revenu du Canada me laisse à penser qu'il sera facile à utiliser.

- f. Je craindrais de laisser passer d'importantes déductions.
- g. Ce nouveau service conviendrait probablement à ma situation financière personnelle.
- h. Je veux contrôler ce qui est inclus dans ma déclaration de revenus, et ce service pourrait être trop restrictif.

Tout à fait d'accord

Plutôt d'accord

Plutôt en désaccord

Tout à fait en désaccord

[SI LA RÉPONSE À QS1 EST « AUCUNEMENT INTÉRESSÉ », PASSER À DONNÉES DÉMOGRAPHIQUES]

QS5. Si vous aviez à choisir, préféreriez-vous accéder à ce service en ligne ou par téléphone grâce à un système automatisé?

En ligne

Par téléphone grâce à un système automatisé

Ni l'un, ni l'autre (Ne pas lire)

QS6. Êtes-vous inscrit au service en ligne Mon Dossier de l'Agence du revenu du Canada? Mon Dossier est un service en ligne qui vous permet entre autres de faire le suivi de votre remboursement, de visualiser ou de modifier votre déclaration, de vérifier les versements de vos prestations et de vos crédits, d'afficher votre plafond de cotisation à un REER, d'effectuer un dépôt direct et de recevoir le courrier en ligne.

Oui

Non

[SI LA RÉPONSE À LA QS5 = EN LIGNE, POSER LA QUESTION QS7; SINON PASSER À LA QUESTION QS8.]

QS7. Vous avez dit que vous préféreriez accéder à ce nouveau service en ligne. Est-ce que vous accéderiez à ce service à partir du service Mon Dossier ou à partir de l'application MonARC pour appareils mobiles? (RÉPÉTER LA LISTE – UNE SEULE RÉPONSE)

Mon Dossier

Application mobile MonARC

Les deux (Ne pas lire)

Aucun des deux (Ne pas lire)

[SI LA RÉPONSE À LA QS6 = NON, NE SAIS PAS OU REFUSE DE RÉPONDRE, POSER LA QUESTION QS8; SINON PASSER À LA QUESTION QS9.]

QS8. Ce nouveau service vous inciterait-il à vous inscrire au service en ligne Mon Dossier de l'ARC?

Oui

Non

(NE PAS LIRE CETTE OPTION) Peut-être

QS9. Si vous pouviez utiliser ce nouveau service, préféreriez-vous recevoir un avis d'admissibilité chaque année, ou seulement être informé si vous n'y êtes plus admissible?

Chaque année

Si vous n'êtes plus admissible au service

QS10. Selon vous, quelle est la meilleure façon d'informer les contribuables, comme vous, de ce nouveau service? Devrions-nous les informer par...? (LIRE LA LISTE – PERMETTRE JUSQU'À TROIS RÉPONSES.)

Correspondance en ligne sécurisée au moyen du service Mon Dossier

Lettre par la poste

Mention dans l'avis de cotisation

Médias sociaux (Facebook, Twitter, etc.)

Publicité télévisée

Publicité à la radio

Publicité dans les journaux

Autre, veuillez spécifier : **[QUESTION OUVERTE – UNE SEULE RÉPONSE]**

(Ne pas lire) Aucune de ses réponses

QS11. Combien de fois accédez-vous à Internet? (LIRE LA LISTE)

Plusieurs fois par jour

Une fois par jour

Quelques fois par semaine



Une fois par semaine

Moins d'une fois par semaine

Je n'utilise pas Internet

Données démographiques

Enfin, j'aimerais vous poser quelques questions qui serviront uniquement à des fins de statistiques. Je tiens à vous rappeler que toutes vos réponses seront tenues strictement confidentielles.

D1 Pouvez-vous me fournir les trois premiers caractères de votre code postal?

D2. Quel est le niveau d'études le plus élevé que vous avez accompli?

(LIRE LA LISTE À MOINS QUE LE RÉPONDANT FOURNISSE SA RÉPONSE AVANT LA FIN DE LA LISTE; ACCEPTER UNE RÉPONSE)

École primaire ou moins

Études secondaires non complétées

Diplôme d'études secondaires ou équivalent

Apprentissage enregistré ou autre certificat ou diplôme de métier

Certificat ou diplôme d'un collègue, d'un cégep ou d'une autre institution non universitaire

Certificat ou diplôme universitaire inférieur à un baccalauréat

Baccalauréat

Diplôme d'études supérieures au-delà du baccalauréat

D3. Laquelle des catégories suivantes décrit le mieux votre situation d'emploi actuelle? Êtes-vous....? (LIRE LA LISTE À MOINS QUE LE RÉPONDANT FOURNISSE SA RÉPONSE AVANT LA FIN DE LA LISTE; ACCEPTER UNE RÉPONSE)

Employé à temps plein, c'est-à-dire 35 heures ou plus par semaine

Employé à temps partiel, c'est-à-dire moins de 35 heures par semaine

Travailleur indépendant

Sans emploi, mais à la recherche d'un emploi

Aux études à temps plein



À la retraite

Pas sur le marché du travail (au foyer à temps plein, sans emploi et non à la recherche d'un emploi)

(NE PAS LIRE CETTE OPTION) Autre – (NE PAS PRÉCISER)

(NE PAS LIRE CETTE OPTION) Refuse de répondre

D4. Laquelle des catégories suivantes décrit le mieux le revenu annuel total de votre ménage, c'est-à-dire le revenu total avant impôts de tous les membres de votre ménage combinés? (LIRE LA LISTE À MOINS QUE LE RÉPONDANT FOURNISSE SA RÉPONSE AVANT LA FIN DE LA LISTE)

Moins de 20 000 \$

Entre 20 000 \$ et un peu moins de 40 000 \$

Entre 40 000 \$ et un peu moins de 60 000 \$

Entre 60 000 \$ et un peu moins de 80 000 \$

Entre 80 000 \$ et un peu moins de 100 000 \$

Entre 100 000 \$ et un peu moins de 150 000 \$

150 000 \$ et plus

D5. Quelle langue parlez-vous le plus souvent à la maison? (LIRE LA LISTE — ACCEPTER TOUTES LES RÉPONSES QUI S'APPLIQUENT)

Anglais

Français

Autre [**PRÉCISER :**]

D6. Êtes-vous né au Canada?

Oui

Non

[POSER LA QUESTION D7 SI LA RÉPONSE À LA D6 = NON; SINON, PASSER À LA QUESTION D8]

D7. En quelle année êtes-vous arrivé au Canada? (INDIQUER L'ANNÉE; DEMANDER POUR UNE ANNÉE APPROXIMATIVE SI LE RÉPONDANT NE SE RAPPELLE PAS L'ANNÉE EXACTE.)



[1900-2016]

D8. Faites-vous partie de la population autochtone, c'est-à-dire Première Nation, Métis ou Inuk (AU BESOIN : Inuit)? Première Nation comprend les Indiens avec statut et les Indiens sans statut.

(REMARQUE : AUTOCHTONES MENTIONNÉS SÉPARÉMENT, CONFORMÉMENT À L'APPROCHE DE STATISTIQUE CANADA)

Oui

Non

[SI LE CODE DE RTA FOURNI À LA QUESTION D1 CORRESPOND À LA RÉGION MÉTROPOLITAINE DE VANCOUVER, DE LONDON, DE QUÉBEC OU DE HALIFAX, PARLER DES GROUPES DE DISCUSSION.]

GROUPES DE DISCUSSION Au cours des prochaines semaines, nous mènerons des groupes de discussion avec des résidents de votre région pour approfondir les résultats de ce sondage. Encore une fois, votre participation demeurera strictement confidentielle et est tout à fait volontaire. Les participants à ces groupes recevront une rémunération de 75 \$ pour leur présence. Aimerez-vous faire partie de l'un de ces groupes de discussion?

Oui

Non

[SI LA RÉPONSE EST OUI, DEMANDER AU RÉPONDEUR DE FOURNIR SES COORDONNÉES; SINON, PASSER À LA CLÔTURE DU SONDAJE.]

COORDONNÉES Puis-je confirmer votre nom et votre numéro de téléphone pour que nous puissions vous rappeler afin de vous fournir les détails du groupe de discussion? *(Au besoin, préciser ceci aux participants : Cette information ne sera pas fournie au gouvernement du Canada et demeurera confidentielle.*

Nom :

Numéro de téléphone :

CLÔTURE DU SONDAJE Voilà ce qui met fin à notre sondage. Merci beaucoup pour votre participation. Nous vous en sommes fort reconnaissants. Au nom d'Ipsos, du gouvernement du Canada et de moi-même, passez une belle journée (belle soirée)!



3.1.4 Qualitative Screener

3.1.4.1 English Version

**Recruitment Questionnaire
Meeting the Government of Canada’s Service Standards**

GROUP SPECIFICATIONS IN EACH CITY

Group 1	Group 2
Tax filing method: Paper (good mix between paper and 2D barcode)	Tax filing method: Good mix of filing online themselves (Netfile), or using the services of an accountant or tax-preparation company, or the Community Volunteer Income Tax Program (e-File)
Good mixes of gender, education, age (aiming for 50/50 split by filing method and between less than 65 and 65 and above)	Good mixes of gender, education, age (aiming for 50/50 split by filing method and between less than 65 and 65 and above)
No employment income	No employment income
10 recruits per group - \$75 incentive	10 recruits per group - \$75 incentive

Introduction

Good morning/afternoon/evening, my name is _____ and I am calling from Ipsos, a national marketing research organization. First off, let me assure you that we are not trying to sell you anything. We are a professional public opinion research firm that gathers opinions from people. From time to time, we solicit opinions by talking with people in a group discussion setting with up to 10 participants.

We are preparing to conduct a series of these discussions on behalf of the Government of Canada, more specifically the Canada Revue Agency, about a new service to Canadians, and would like to know if you would be willing to participate. The discussion will last no more than two hours and will take place during the evening. People who take part in the discussion will receive a \$75 incentive in appreciation for their time. Participation in this research is completely voluntary and individual’s decision to take part will not affect any dealings they may have with the Government of Canada and the Canada Revenue Agency.

As part of this discussion, you will be asked to provide feedback on materials and policies in a group setting. Do you feel comfortable doing this?

Yes

No (THANK AND TERMINATE)

IF PARTICIPANT WANTS TO VERIFY STUDY’S LEGITIMACY, PROVIDE CRA CONTACT INFORMATION: XXXXX, PUBLIC OPINION RESEARCH DIVISION, CRA, 613-XXX-XXXX.

Please be assured, should you agree to participate your identity will remain confidential.

1. Do you currently reside in **[INSERT CITY FROM BELOW]**?
2. Would you be interested in participating in this discussion which will be held at a location in _____ on _____?

Yes **CONTINUE**

No **THANK AND TERMINATE**

Location	Time	Date
Halifax Corporate Research Associates 7071 Bayers Road , #5001	Group 1 – 5:30pm Paper Filers	Tuesday, November 29, 2016
	Group 2 – 7:30pm Electronic Filers	
Vancouver Ipsos 1285 West Pender Street Suite 200	Group 1 – 5:30pm Paper Filers	Thursday, December 1, 2016
	Group 2 – 7:30pm Electronic Filers	
London, Ontario Insights Research 546 Adelaide Street North	Group 1 – 5:30pm Paper Filers	Monday, December 5, 2016
	Group 2 – 7:30pm Electronic Filers	
Quebec City (French) SOM Quebec 3340, rue de La Pérade 3rd Floor	Group 1 – 5:30pm Paper Filers	Wednesday, December 7, 2016
	Group 2 – 7:30pm Electronic Filers	

MRIA Standards Screener

Now, I would like to ask you a few questions to see if you qualify to attend. This will take about 5 minutes.

(INTERVIEWER RECORD GENDER, DO NOT ASK) (AIM FOR 50/50 MIX)

Male

Female



1. Do you or does anyone in your household work in any of the following industries? **(READ LIST) IF "YES" TO ANY - THANK AND TERMINATE**

Market Research or Marketing

Public Relations or Media (TV, Print)

Advertising and communications

An accounting firm or tax preparation company or office

An employee of a political party

An employee of a government department or agency

2. Have you ever attended a consumer group discussion, completed an interview or a survey which was arranged in advance and for which you received a sum of money?

[NO MORE THAN THREE RECRUITS WITHIN EACH GROUP MAY SAY YES]

IF Q2= YES, ASK Q3-5, ELSE SKIP TO Q6

3. How many focus groups have you attended in the past five years?

TERMINATE IF MORE THAN 4

4. What were the main topics of these discussions? Answer: _____

IF RELATED TO TAXATION, THANK AND TERMINATE

5. Have you attended a discussion group or a market research focus group in the past six months? **IF "YES" - THANK AND TERMINATE**

Study Specific Screener

6. Which of the following categories best describes your current employment status? Are you...? **[ALL PARTICIPANTS MUST BE EITHER RETIRED OR WITHOUT EMPLOYMENT INCOME. OTHERWISE, THANK AND TERMINATE]**

Working full-time **[THANK AND TERMINATE]**

Working part-time **[THANK AND TERMINATE]**

Self-employed **[THANK AND TERMINATE]**

Retired

Unemployed

Student without employment income

Homemaker



7. Which of the following categories best describes your 2016 total individual income?
[TERMINATE IF INCOME IS MORE THAN \$20,000]

Under \$20,000

- \$20,000 to just under \$40,000
- \$40,000 to just under \$60,000
- \$60,000 to just under \$80,000
- \$80,000 to just under \$100,000
- \$100,000 and above

8. Which of the following best represents how your 2015 income tax return was prepared?
(READ LIST)

- You prepared it on your own.
- You prepared it with the assistance of a family member or a friend.
- It was prepared by a volunteer through the Community Volunteer Income Tax Program.
- It was prepared by an accountant or a tax preparation company such as H&R Block.
- (DO NOT READ) I did not submit an income tax return last year/Prefer not to answer **[THANK & ASK TO SPEAK TO ANOTHER MEMBER OF THE HOUSEHOLD WHO DID PREPARE AND FILE HIS OR HER INCOME TAXES; IF NO ONE ELSE IS AVAILABLE, THANK AND TERMINATE]**

[IF Q8 = "You prepared it on your own" or "You prepared it with the assistance of a family member or a friend" ASK Q9]

[If Q8 = "It was prepared by a volunteer through the Community Volunteer Income Tax Program" or "It was prepared by an accountant or a tax preparation company", QUALIFY FOR GROUP 2 – TRY TO GET 5. CONTINUE TO Q11]

9. How was your income tax return submitted last year? Was it submitted on paper, or was it submitted electronically over the Internet (*if necessary, specify: using Netfile*)? (SINGLE MENTION)

- On paper **[ASK Q10]**
- Electronically/over the Internet (Netfile) **[QUALIFIES FOR GROUP 2 – TRY TO GET 5. SKIP TO Q11]**

10. You mentioned that you submitted your tax return on paper last year. Did you fill it out by hand using the paper forms from the Canada Revenue Agency, or did you use a computer to fill it out, and print a paper copy to submit? **[TRY TO GET A 50/50 SPLIT]**

- By hand, using paper forms
- Used a computer, and printed a paper copy



11. I am going to read you a series of age categories, please stop me when I get to the one that applies to you.

[ENSURE A GOOD MIX OF AGES IN EACH GROUP, WITH HALF OF PARTICIPANTS AGED BETWEEN 65 AND 75 YEARS OLD]

Less than 18 years old **[THANK AND TERMINATE]**

18-24 years old

25-34 years old

35-44 years old

45-54 years old

55-64 years old

65-75 years old **[5 PER GROUP]**

More than 75 years old **[THANK AND TERMINATE]**

12. What is the highest level of education you have attained? (Do not read list).

[DO NOT READ LIST – TRY TO GET A GOOD MIX]

Some high school or less

Completed high school

Post-secondary technical training

Some college/university

Completed college/university

Post-graduate studies

Confirmation

13. Participants in discussion groups are asked to voice their opinions and thoughts. How comfortable are you in voicing your opinions in front of others? Are you... (READ LIST)

Very comfortable	1	MINIMUM 4 PER GROUP
Fairly comfortable	2	CONTINUE
Comfortable	3	CONTINUE
Not very comfortable	4	THANK AND TERMINATE
Very uncomfortable	5	THANK AND TERMINATE
DK/NR	9	THANK AND TERMINATE

14. Sometimes participants are asked to read text, review images or write down things during the discussion. Is there any reason why you could not participate?

Yes	1	THANK AND TERMINATE
No	2	CONTINUE
DK/NR	9	THANK AND TERMINATE

TERMINATE IF RESPONDENT OFFERS ANY REASON FOR NOT BEING ABLE TO COMMUNICATE EFFECTIVELY OR TAKE PART IN THE DISCUSSION IN ANY WAY, SUCH AS SIGHT OR HEARING PROBLEM, A WRITTEN OR VERBAL LANGUAGE PROBLEM.

ALSO TERMINATE IF YOU HAVE ANY CONCERNS ABOUT PARTICIPANTS ABILITY TO BE UNDERSTOOD IN THE LANGUAGE TO BE USED DURING SESSION.

During the discussion, you will be audio- and videotaped. This taping is being done to assist us with our report writing. Also, in this room there is a one-way mirror. Sitting behind the mirror may be Government of Canada staff, including members of the staff from the department that sponsored this research, and by staff members from Ipsos. This is standard focus group procedure to get a first-hand look at the research process and to hear first-hand your impressions and views on the research topic. Do you agree to be observed for research purposes only?

- | | | |
|-----|---|--------------------------|
| Yes | 1 | THANK & GO TO INVITATION |
| No | 2 | THANK & TERMINATE |

******(IN EACH LOCATION, PLEASE ENSURE 10 PARTICIPANTS ARE RECRUITED FOR 8-10 TO SHOW)******

[Read to Stand-by Respondents]

Thank you for answering my questions. Unfortunately, at this time, the group you qualify for is full. We would like to place you on our stand-by list. This means that if there is an opening in the group, we would then call you back and see if you are available to attend the discussion. May I please have a daytime contact number, an evening contact number and an email address, if you have one, so that we can contact you as soon as possible if an opening becomes available? **[RECORD CONTACT INFO]**

[Read to Screened in Respondents]

Wonderful, you qualify to participate in one of these group discussions which will take place on, (DATE) @ (TIME) for no more than 2 hours. The Government of Canada is sponsoring this research. All those who participate will receive a \$75 honorarium as a thank you for their time.

Do you have a pen handy so that I can give you the address where the group will be held? It will be held at:

Location	Time	Date
Halifax Corporate Research Associates 7071 Bayers Road , #5001	Group 1 – 5:30pm Paper Filers	Tuesday, November 29, 2016
	Group 2 – 7:30pm Electronic Filers	
Vancouver Ipsos	Group 1 – 5:30pm Paper Filers	Thursday, December 1, 2016



Meeting the Government of Canada’s Service Mandate

1285 West Pender Street Suite 200	Group 2 – 7:30pm Electronic Filers	
London, Ontario Insights Research 546 Adelaide Street North	Group 1 – 5:30pm Paper Filers	Monday, December 5, 2016
	Group 2 – 7:30pm Electronic Filers	
Quebec City (French) SOM Quebec 3340, rue de La Pérade 3rd Floor	Group 1 – 5:30pm Paper Filers	Wednesday, December 7, 2016
	Group 2 – 7:30pm Electronic Filers	

We ask that you arrive at least 20 minutes early to be sure you locate the facility and have time to check-in with the hosts. Prior to being admitted into the focus group room you will be required to sign a non-disclosure agreement, failure to do so will result in you being denied participation in the focus group session for which you have been selected. Payment of the incentive is contingent on participation in the focus group sessions.

In addition, we will be checking your identification prior to the group, so please be sure to bring two pieces of government issued photo identification with you (i.e. driver’s license, health card or other). Also, if you require glasses for reading, please bring them with you.

As we are only inviting a small number of people, your participation is very important to us. We have invited you to participate based on the questions we went through a moment ago, so we ask that you do not send a representative on your behalf should you be unable to participate. **IF FOR SOME REASON YOU ARE UNABLE TO ATTEND, PLEASE CALL SO THAT WE MAY GET SOMEONE TO REPLACE YOU.** You can reach us at 1-xxx-xxx-xxxx at our office. Someone will call you the day before to remind you about the discussion.

What would be a good time to reach you?
And at what telephone numbers?
May I please get your name? ON FRONT PAGE

Thank you very much for your help!

3.1.4.2 French Version

Questionnaire de recrutement
S'acquitter du mandat de services du gouvernement du Canada

Groupe 1	Groupe 2
Méthode de déclaration de revenus : Papier (bonne combinaison entre le papier et le code à barres 2D)	Méthode de déclaration de revenus : Bonne combinaison de déclaration en ligne par eux-mêmes (IMPÔTNET) et d'utilisation des services d'un comptable, d'une entreprise de préparation de déclarations ou du Programme communautaire des bénévoles en matière d'impôt (TED)
Bonne combinaison de sexe, d'études, d'âge (cible de 50/50 par méthode de déclaration et entre moins de 65 et 65 et plus)	Bonne combinaison de sexe, d'études, d'âge (cible de 50/50 par méthode de déclaration et entre moins de 65 et 65 et plus)
Pas de revenu d'emploi	Pas de revenu d'emploi
10 personnes recrutées par groupe – Prime de 75 \$	10 personnes recrutées par groupe – Prime de 75 \$

Introduction

Bonjour/bonsoir, mon nom est _____ je vous appelle d'Ipsos, une organisation nationale de recherche en marketing. Tout d'abord, laissez-moi vous assurer que nous n'essayons pas de vous vendre quoi que ce soit. Nous sommes une société professionnelle de recherche sur l'opinion publique qui recueille l'opinion des personnes. De temps à autre, nous sollicitons les opinions en parlant avec les gens dans un environnement de discussion de groupe avec dix participants au maximum.

Nous nous apprêtons à mener une série de discussions au nom du gouvernement du Canada, plus particulièrement l'Agence du revenu du Canada, à propos d'un nouveau service pour les Canadiens, et nous aimerions savoir si vous désiriez participer. La discussion ne durera pas plus de deux heures et aura lieu en soirée. Les gens qui participeront à la discussion recevront une prime de 75 \$ en guise de remerciement pour leur présence. La participation à cette recherche est totalement volontaire, et la décision d'y participer n'aura aucun effet sur les négociations que les participants pourraient avoir avec le gouvernement du Canada et l'Agence du revenu du Canada.

Dans le cadre de cette discussion, on vous demandera de formuler des commentaires sur des documents et des politiques dans un environnement de groupe. Vous sentez-vous à l'aise dans ce rôle?

Oui

Non (REMERCIER LE RÉPONDANT ET METTRE FIN À L'APPEL)

SI LE PARTICIPANT DEMANDE À VÉRIFIER LA LÉGITIMITÉ DE L'ÉTUDE, DONNER L'INFORMATION DE SUIVI SUIVANTE : EMMANUELLE SAVARIA, CONSEILLÈRE PRINCIPALE EN AFFAIRES PUBLIQUES, DIVISION DE LA RECHERCHE SUR L'OPINION PUBLIQUE, L'ARC, 613-941-3084.

Soyez assuré(e) que si vous acceptez de participer, votre identité restera confidentielle.

Résidez-vous actuellement à **[INSÉRER LA VILLE À PARTIR DE LA LISTE CI-DESSOUS]**?

Souhaiteriez-vous participer à ces discussions qui auront lieu dans un emplacement désigné à _____ le _____?

Oui **CONTINUER**

Non **REMERCIER LE RÉPONDANT ET METTRE FIN À L'APPEL**

Emplacement	Heure	Date
Halifax Corporate Research Associates 7071, chemin Bayers, bureau 5001	Groupe 1 – 17 h 30 Déclarants par support papier	Mardi 29 novembre 2016
	Groupe 2 – 19 h 30 Déclarants par voie électronique	
Vancouver Ipsos 1285, rue Pender Ouest Bureau 200	Groupe 1 – 17 h 30 Déclarants par support papier	Jeudi 1 ^{er} décembre 2016
	Groupe 2 – 19 h 30 Déclarants par voie électronique	
London, Ontario Insights Research 546, rue Adelaide Nord	Groupe 1 – 17 h 30 Déclarants par support papier	Lundi 5 décembre 2016
	Groupe 2 – 19 h 30 Déclarants par voie électronique	
Québec (français) SOM Québec 3340, rue de La Pérade 3 ^e étage	Groupe 1 – 17 h 30 Déclarants par support papier	Mercredi 7 décembre 2016
	Groupe 2 – 19 h 30 Déclarants par voie électronique	

Questions en relation avec les normes de l'ARIM

J'aimerais maintenant vous poser quelques questions pour voir si vous pouvez participer. Cela durera environ 5 minutes.

(CONSIGNATION DU SEXE PAR L'INTERVIEWEUR, NE PAS POSER LA QUESTION) (CIBLE DE 50/50)

Homme

Femme

1. Est-ce que vous ou un membre de votre foyer travaillez dans l'un des secteurs suivants?
(LIRE LA LISTE) SI « OUI » À L'UN DES SECTEURS – REMERCIER LE RÉPONDANT ET METTRE

FIN À L'APPEL

Étude de marché ou marketing

Relations publiques ou médias (télévision, presse imprimée)

Publicité et communications

Firme comptable ou entreprise ou bureau de préparation de déclarations de revenus

Employé d'un parti politique

Employé d'un ministère ou organisme gouvernemental

2. Avez-vous déjà participé à une discussion de groupe de consommateurs, répondu à une entrevue ou à une enquête qui était organisée à l'avance et pour laquelle vous avez été rémunéré(e)?

[PAS PLUS DE TROIS PERSONNES RECRUTÉES DANS CHAQUE GROUPE PEUVENT DIRE OUI]

[SI LA RÉPONSE À LA Q2 = OUI, POSER LES Q3 À Q5; SINON, PASSER À LA Q6]

3. À combien de groupes de discussion avez-vous participé au cours des cinq dernières années?

TERMINER L'APPEL SI PLUS QUE 4

4. Quels étaient les principaux sujets de ces discussions? Réponse : _____

SI LES SUJETS ÉTAIENT LIÉS À L'IMPOSITION, REMERCIER LE RÉPONDANT ET METTRE FIN À L'APPEL

5. Avez-vous déjà participé à un groupe de discussion ou à un groupe de discussion pour une étude de marché au cours des six derniers mois? **SI OUI – REMERCIER LE RÉPONDANT ET**

METTRE FIN À L'APPEL

Questions propres à l'étude

6. Laquelle des catégories suivantes décrit le mieux votre situation d'emploi actuelle?

Êtes-vous...? **[TOUS LES PARTICIPANTS DOIVENT ÊTRE À LA RETRAITE OU SANS REVENU D'EMPLOI. SINON, REMERCIER LE RÉPONDANT ET METTRE FIN À L'APPEL]**

Travailleur à temps plein **[REMERCIER LE RÉPONDANT ET METTRE FIN À L'APPEL]**

Travailleur à temps partiel **[REMERCIER LE RÉPONDANT ET METTRE FIN À L'APPEL]**

Travailleur indépendant **[REMERCIER LE RÉPONDANT ET METTRE FIN À L'APPEL]**

À la retraite

Sans emploi

Étudiant sans revenu d'emploi

Au foyer

7. Laquelle des catégories suivantes décrit le mieux votre revenu individuel total de 2016?

[TERMINER L'APPEL SI LE REVENU EST SUPÉRIEUR À 20 000 \$]

Moins de 20 000 \$

Entre 20 000 \$ et un peu moins de 40 000 \$

Entre 40 000 \$ et un peu moins de 60 000 \$

Entre 60 000 \$ et un peu moins de 80 000 \$

Entre 80 000 \$ et un peu moins de 100 000 \$

100 000 \$ et plus

8. Parmi les réponses suivantes, laquelle correspond le mieux à la façon dont votre déclaration de revenus a été préparée en 2015? (LIRE LA LISTE)

- Vous l'avez préparée vous-même.
- Vous l'avez préparée avec l'aide d'un membre de votre famille ou d'un ami.
- Elle a été préparée par un bénévole du Programme communautaire des bénévoles en matière d'impôt.

- Elle a été préparée par un comptable ou par une entreprise de préparation de déclarations comme H&R Block.
- (NE PAS LIRE) Je n'ai pas soumis de déclaration de revenus l'année dernière/Préfère ne pas répondre **[REMERCIER LE RÉPONDANT DE SA RÉPONSE ET DEMANDER À PARLER À UN AUTRE MEMBRE DU MÉNAGE QUI A PRÉPARÉ ET PRODUIT SA DÉCLARATION DE REVENUS, ET SI PERSONNE D'AUTRE N'EST DISPONIBLE, REMERCIER LE RÉPONDANT ET METTRE FIN À L'APPEL]**

[SI LA RÉPONSE À LA Q8 = « Vous l'avez préparée vous-même. » ou « Vous l'avez préparée avec l'aide d'un membre de votre famille ou d'un ami. », POSER LA Q9]

[SI LA RÉPONSE À LA Q8 = « Elle a été préparée par un bénévole du Programme communautaire des bénévoles en matière d'impôt. » ou « Elle a été préparée par un comptable ou par une entreprise de préparation de déclarations. », ADMISSIBLE AU GROUPE 2 – ESSAYER D'EN OBTENIR 5. PASSER À LA QUESTION Q11]

9. De quelle façon avez-vous soumis votre déclaration de revenus l'année dernière? Était-ce sur papier ou par voie électronique, par Internet (*au besoin, préciser : au moyen d'IMPÔTNET*)? (ACCEPTER UNE SEULE RÉPONSE)

- Sur papier **[POSER LA Q10]**
- Par voie électronique/par Internet (IMPÔTNET) **[ADMISSIBLE AU GROUPE 2 – ESSAYER D'EN OBTENIR 5. PASSER À LA Q11]**

10. Vous avez mentionné que vous avez soumis votre déclaration de revenus sur papier l'année dernière. L'avez-vous remplie à la main à l'aide des formulaires papier de l'Agence du revenu du Canada, ou avez-vous utilisé un ordinateur et imprimé une copie papier à soumettre?

[ESSAYER D'OBTENIR 50/50]

- À la main à l'aide des formulaires papier
- A utilisé un ordinateur et imprimé une copie papier

11. Je vais vous lire une série de catégories d'âge, veuillez m'arrêter quand je suis à celle qui vous correspond.

[ASSURER UNE BONNE COMBINAISON D'ÂGES DANS CHAQUE GROUPE, AVEC LA MOITIÉ DES PARTICIPANTS ÂGÉS DE 65 À 75 ANS]

Moins de 18 ans **[REMERCIER LE RÉPONDANT ET METTRE FIN À L'APPEL]**

18-24 ans

25-34 ans

35-44 ans

45-54 ans

55-64 ans

65-75 ans **[5 PAR GROUPE]**

Plus de 75 ans **[REMERCIER LE RÉPONDANT ET METTRE FIN À L'APPEL]**

12. Quel est le niveau d'études le plus élevé que vous avez atteint? (Ne pas lire la liste).

[NE PAS LIRE LA LISTE – ESSAYER D'OBTENIR UNE BONNE COMBINAISON]

Secondaire en partie ou moins

A terminé ses études secondaires

Formation technique postsecondaire

Début du collège/de l'université

A terminé le collège/l'université

Études supérieures

Confirmation

13. On demande aux participants aux groupes de discussion d'exprimer leurs opinions et leurs pensées. Vous sentez-vous à l'aise d'exprimer vos opinions devant les autres? Diriez-vous que vous êtes ... (LIRE LA LISTE)

Très à l'aise	1	4 PAR GROUPE AU MINIMUM
Assez à l'aise	2	CONTINUER
À l'aise	3	CONTINUER
Pas très à l'aise	4	REMERCIER LE RÉPONDANT ET METTRE FIN À L'APPEL
Très mal à l'aise	5	REMERCIER LE RÉPONDANT ET METTRE FIN À L'APPEL
NE SAIT PAS/PAS DE RÉPONSE	9	REMERCIER LE RÉPONDANT ET METTRE FIN À L'APPEL

14. Parfois, on demande aux participants de lire un texte, d'examiner des images ou d'écrire des choses pendant la discussion. Y a-t-il une raison pour laquelle vous ne pourriez pas participer?

Oui	1	REMERCIER LE RÉPONDANT ET METTRE FIN À L'APPEL
Non	2	CONTINUER
NE SAIT PAS/PAS DE RÉPONSE	9	REMERCIER LE RÉPONDANT ET METTRE FIN À L'APPEL

METTRE FIN À L'APPEL SI LE RÉPONDANT DONNE UNE RAISON D'INCAPACITÉ À COMMUNIQUER EFFICACEMENT OU À PARTICIPER À LA DISCUSSION D'UNE QUELCONQUE FAÇON, COMME UN PROBLÈME DE VUE OU D'OUÏE, UN PROBLÈME DE LANGAGE ÉCRIT OU VERBAL.

METTRE AUSSI FIN À L'APPEL SI VOUS AVEZ DES PRÉOCCUPATIONS CONCERNANT LA CAPACITÉ DES PARTICIPANTS À SE FAIRE COMPRENDRE DANS LA LANGUE UTILISÉE PENDANT LA SÉANCE.

Pendant la discussion, vous serez enregistré(e) sur bande sonore et vidéo. Cet enregistrement nous aide dans la rédaction de notre rapport. De même, la salle dispose d'un miroir sans tain. Il se peut que du personnel du gouvernement du Canada soit présent de l'autre côté du miroir, notamment des membres du personnel du ministère qui parraine cette étude, et des membres du personnel d'Ipsos. Il s'agit d'une procédure de groupe de discussion standard visant à avoir un aperçu direct du processus d'étude et d'entendre directement vos impressions et avis sur le sujet d'étude.

Convendez-vous d'être observé(e) aux fins d'étude seulement?

Oui	1	REMERCIER LE RÉPONDANT ET PASSER À L'INVITATION
Non	2	REMERCIER LE RÉPONDANT ET METTRE FIN À L'APPEL

******(DANS CHAQUE LIEU, VEUILLEZ VOUS ASSURER QUE DIX PARTICIPANTS SONT RECRUTÉS POUR EN OBTENIR HUIT À DIX)******

[À lire aux répondants en attente]

Merci d'avoir répondu à mes questions. Malheureusement, pour le moment, le groupe auquel vous êtes admissible est complet. Nous aimerions vous inscrire sur notre liste d'attente. Cela signifie que s'il y a une ouverture dans le groupe, nous vous rappellerons pour voir si vous êtes disponible afin de participer à la discussion. Puis-je avoir un numéro de téléphone où vous joindre pendant la journée et en soirée, ainsi qu'une adresse électronique, si vous en avez une, afin que nous puissions communiquer avec vous dès que possible si une place devient disponible? **[CONSIGNER LES COORDONNÉES]**

[À lire aux répondants sélectionnés]

C'est formidable, vous pouvez participer à l'une des discussions de groupe qui aura lieu le (DATE) à (HEURE) pendant deux heures au maximum. Le gouvernement du Canada parraine cette étude. Tous ceux qui participent recevront une rétribution de **75 \$** en remerciement de leur temps.

Avez-vous un stylo à portée de main afin que je puisse vous donner l'adresse du lieu où le groupe tiendra sa séance? La séance aura lieu à :

Emplacement	Heure	Date
Halifax Corporate Research Associates 7071, chemin Bayers, bureau 5001	Groupe 1 – 17 h 30 Déclarants par support papier	Mardi 29 novembre 2016
	Groupe 2 – 19 h 30	

	Déclarants par voie électronique	
Vancouver Ipsos 1285, rue Pender Ouest Bureau 200	Groupe 1 – 17 h 30 Déclarants par support papier	Jeudi 1 ^{er} décembre 2016
	Groupe 2 – 19 h 30 Déclarants par voie électronique	
London, Ontario Insights Research 546, rue Adelaide Nord	Groupe 1 – 17 h 30 Déclarants par support papier	Lundi 5 décembre 2016
	Groupe 2 – 19 h 30 Déclarants par voie électronique	
Québec (français) SOM Québec 3340, rue de La Pérade 3 ^e étage	Groupe 1 – 17 h 30 Déclarants par support papier	Mercredi 7 décembre 2016
	Groupe 2 – 19 h 30 Déclarants par voie électronique	

Nous vous demandons d'arriver au moins 20 minutes à l'avance pour vous assurer de trouver le lieu et avoir le temps de vous inscrire auprès des hôtes. Avant votre admission dans la salle de groupe de discussion, vous devrez signer une entente de non-divulgateion; si vous ne le faites pas, votre participation à la séance de groupe de discussion pour laquelle vous avez été sélectionné(e) sera refusée. Le paiement de la prime dépend de la participation aux séances de groupe de discussion.

De plus, nous vérifierons votre identité avant la séance, alors veuillez vous assurer d'apporter deux pièces d'identité avec photo produites par le gouvernement (p. ex. permis de conduire, carte d'assurance maladie ou autre). Si vous avez besoin de lunettes pour lire, veuillez les apporter.

Comme nous invitons un petit nombre de personnes, votre participation est très importante pour nous. Nous vous avons invité(e) à participer en fonction des questions que nous avons abordées il y a un instant, nous vous demandons donc de ne pas envoyer un représentant en votre nom si vous n'êtes pas en mesure de participer. **SI, POUR UNE QUELCONQUE RAISON, VOUS N'ÊTES PAS EN MESURE DE PARTICIPER, VEUILLEZ NOUS APPELER AFIN QUE NOUS PUISSIONS VOUS REMPLACER.** Vous pouvez communiquer avec nous au 1-xxx-xxx-xxxx à notre bureau. Quelqu'un vous appellera la veille pour vous rappeler l'événement de discussion.

À quel moment est-il préférable de vous appeler?

À quel numéro de téléphone?

Puis-je avoir votre nom? SUR LA PAGE COUVERTURE

Merci beaucoup pour votre aide!



3.1.5 Qualitative Discussion Guide

3.1.5.1 English Version

Meeting the Government of Canada Service Mandate Final Discussion Guide

Introduction (10 minutes):

- Introduce moderator and welcome participants to the focus group.
 - As we indicated during the recruiting process, we are conducting focus group discussions on behalf of the Government of Canada. For this evening's discussion, we are particularly interested in your views regarding your personal experience with income tax filing and a possible new service offering from the Government of Canada.
- The discussion will last approximately 2 hours. Feel free to excuse yourself during the session if necessary.
- Explanation re:
 - Audio/video-taping – The session is being video/audio-taped for analysis purposes, in case we need to double-check the proceedings against our notes. These video-tapes remain in our possession and will not be released to anyone without written consent from all participants.
 - One-way mirror/webstream – There are observers representing the government who will be watching the discussion from behind the glass. We always invite clients to attend focus groups and hear what respondents have to say, in their own words, rather than wait for a report.
 - Confidentiality – Please note that anything you say during these groups will be held in the strictest confidence. We do not attribute comments to specific people. Our report summarizes the findings from the groups but does not mention anyone by name. The report can be accessed through the Library and Archives Canada or via the web site www.porr-rrp.gc.ca.
- Describe how a discussion group functions:
 - Discussion groups are designed to stimulate an open and honest discussion. My role as a moderator is to guide the discussion and encourage everyone to participate. Another function of the moderator is to ensure that the discussion stays on topic.
 - Your role is to answer questions and voice your opinions. We are looking for minority as well as majority opinion in a focus group, so don't hold back if you have a comment even if you feel your opinion may be different from others in the group. There may or may not be others who share your point of view. Everyone's opinion is important and should be respected.
 - I would also like to stress that there are no right or wrong answers. We are simply looking for your opinions and attitudes. It was not a prerequisite coming

into the groups that you be an authority on taxation issues. This is not a test of your knowledge.

- Please note that the moderator is not an employee of the Government of Canada and may not be able to answer some of your questions.
- (Moderator introduces herself/himself). Participants also introduce themselves, using their first names only.
- Please tell us a little bit about yourself – family situation or hobbies – anything you would like to share with the rest of the group.

Section 1 – Warm-Up Discussion (10 minutes)

- Now, using the pen and paper in front of you, I'd like you to write down one or two things that immediately come to your mind when you think of income tax preparation and filing. No need to think, I just want your immediate thoughts, no matter what they are. MODERATOR TO NOTE ON FLIPCHART AND PROBE:
 - What did you think of? What made you think of that?
 - Is there anything on this list that you find surprising, or that strike you as remarkable in any way?

[SECTION 2 IS FOR PAPER FILERS ONLY]

Section 2 – Paper Filers Groups Only (25 minutes)

You are here tonight in part because you have all prepared and/or filed your taxes on paper last year. My next few questions relate to this experience.

- First, I'd like to know how many of you have prepared and filed their taxes entirely on paper and how many have prepared them on a computer, but printed them and sent them off by regular mail. ASK BY SHOW OF HANDS.
- Personally, do you find the income tax preparation and filing process to be simple or complicated? What makes you say that?
- Is it something that you enjoy doing? Why or why not?
 - Why do you file your income tax on paper? IF NEEDED, PROBE FOR:
 - Old habit / comfort zone
 - Simple
 - Control over the process
 - No need for technology
 - Are there any negative aspects for you? IF NEEDED, PROBE FOR:
 - Too complicated

- Forms and instructions hard to follow
- Takes too much time
- Fear of making a mistake

- Have you encountered issues when preparing or filing your taxes in recent years? If so, what kind of problems did you face?

- Have you ever considered or ever tried using another method than paper filing in the past? Why or why not?
 - If yes, what have you considered or tried?
 - *If tried*: How did it go? Why did you revert to paper filing?
 - *If not tried*: why did you change your mind?

- And would you consider changing in the next two to three years?
 - If yes, what options would you look into? Filing electronically by yourself, or using the services of a tax preparation company or an accountant?
 - Why this option over the other?
 - IF E-FILE PREFERRED: Would the cost of using an accountant or tax preparation firm be a problem?
 - If no, what are the main reasons why you would not consider changing?
 - Probe for: habit, comfort, control over the process, fear of using electronic data transfer, not at ease with computers, little or no Internet access, cost of using outside assistance or software.
 - Is there anything that could convince you to change to another form of filing?

[SECTION 3 IS FOR ELECTRONIC FILERS ONLY]

Section 3 – Electronic Filers Groups Only (25 minutes)

You are here tonight in part because you have all prepared and/or filed your taxes electronically, have used the services of an accountant or tax preparation company in previous years or have used the assistance of a volunteer from the Canada Revenue Agency.

- By show of hands, who has:
 - Prepared and filed their taxes themselves over the Internet?
 - Used the services of an accountant or tax preparation company?
 - Used the services of a volunteer from the Canada Revenue Agency?

Ask each subgroup:

- Personally, do you find the income tax preparation or filing process to be simple or complicated? What makes you say that?
- Have you encountered issues when preparing or filing your taxes in recent years? If so, what kind of problems did you face?

- How many years ago did you start preparing and/or filing your taxes this way?
- NET-FILERS: Is it something that you enjoy doing? Why or why not?
 - What are the positive aspects, if any? IF NEEDED, PROBE FOR:
 - Old habit / comfort zone
 - Simple / fast
 - Control over the process
 - What are the negative aspects for you? IF NEEDED, PROBE FOR:
 - Too complicated
 - Too costly
 - Forms and instructions hard to follow
 - Takes too much time
 - Sharing personal information over the Internet
 - Fear of making a mistake
- E-FILERS: Overall, how satisfied are you with the services you received from your accountant or tax preparation company?
 - What are the positive aspects, if any? IF NEEDED, PROBE FOR:
 - Simple / fast
 - Control over the process
 - What are the negative aspects for you? IF NEEDED, PROBE FOR:
 - Sharing personal information with third party
 - Too costly
 - No or little control
 - Fear that accountant/firm will make a mistake

ASK ALL:

- How confident are you that you always take advantage of all the benefits and deductions that are available to you? What makes you say that? Are there particular areas of concern for you?
- How confident are you that your privacy and your personal information was protected during the process? What makes you say that?
 - *For e-filers:* are there things that worry you about sharing your information with a third party?
 - *For net-filers:* are there things that worry you about sharing your information over the Internet?
- And would you consider changing your tax preparation and filing method in the next two to three years?
 - If yes, what options would you look into? Filing electronically by yourself, or using the services of a tax preparation company or an accountant?
 - Why this option?
 - FOR NET-FILERS: Would the cost of using an accountant or tax preparation firm be a problem?
 - If no, what are the main reasons why you would not consider changing?

- Probe for: habit, comfort, control over the process, fear of using electronic data transfer, not at ease with computers, little or no Internet access, cost of using outside assistance, etc.
- Is there anything that could convince you to switch to another filing method?

Section 4 – Invitation Letter (20 minutes)

Now, I'd like to spend some time reviewing an invitation letter that potentially eligible Canadians may receive regarding a new service that could be offered by the Government of Canada to taxpayers called *File My Return*. We will discuss this new service in detail during the next hour or so, but before we look at it, I want you to take a few minutes to read the following introduction letter.

MODERATOR TO DISTRIBUTE A PAPER COPY OF THE DOCUMENT AND ASK RESPONDENTS TO DO THE FOLLOWING:

- Using the pen in front of you, I would like you to do a few things when reading this document. First, please take the time to circle every element that you find particularly good, clear or interesting. Second, please cross out elements that you find to be not good, unclear or not interesting. Third, please take a few seconds and give this overall document a score from 1 to 10, where a score of 1 means that you do not find this idea interesting at all for you and 10 means that you find it extremely interesting. You can write the score at the top of the page.

MODERATOR TO GIVE PARTICIPANTS FIVE MINUTES TO DO THE EXERCISE.

- BY SHOW OF HANDS: Get a sense of the score provided.
 - What makes you choose that score?
 - What are the things that you circled, or that you found particularly good or interesting?
 - What makes you say that?
 - If not mentioned: how about the fact that it's free of charge? Is this a very interesting aspect for you?
 - What are the things that you crossed out, or that you found not so good or not interesting?
 - What makes you say that?
 - If you received this letter, would you look into this service? Why or why not?
 - Would you prefer to look into the phone version or the online version?
- MODERATOR TO TAKE NOTE OF HOW MANY CHOOSE PHONE VERSUS ONLINE BY SHOW OF HANDS.
- For people who prefer phone: what makes you say that?

- Would you be totally opposed to using the online version? Why or why not?
- For people who chose online: what makes you say that?
 - Would you be totally opposed to using the phone version? Why or why not?
- *For those who did not see it as appealing to them:*
 - What are the main reasons why you would not consider using this service?
 - IF NEEDED, PROBE FOR: Trust in CRA to make things simple, safe or accurate; fear of losing control of their tax return.
 - Is there anything that could make it more interesting for you?
 - Do you think this could be appealing for people you know? Why?
- Is it clear? Is there anything confusing or unclear?
- Does the letter give you a good sense of how this service would work?
- Does it make you feel that this service would be easy to use?
 - Do you think you would be able to use it by yourself?
- Is there anything missing? Information that should be included?
- What would make it more appealing to you?

Section 4 – Online Version (30 minutes)

Now, I'd like to spend some time reviewing what the *File My Return* service could look like in its online version. I will show you a demonstration version of the service. This is not a final version, but simply a trial version so we can show you the main features and give you a good sense of how it would work. Please feel free to write down any observations you may have while I am doing this. If you get confused along the way or have a specific question, please let me know.

MODERATOR TO DO A THOROUGH RUN-THROUGH ON SCREEN WITH THE GROUP, SHOWING THE VARIOUS STEPS FOR BOTH THE SINGLE AND MARRIED VERSIONS.

Before we talk about it as a group, I want you to write down on the sheet in front of you a score of 1 to 10, where a score of 1 means that you do not find this idea interesting at all for you and 10 means that you find it extremely interesting.

- What score did you give this service on the scale of 1 to 10? SHOW OF HANDS
 - What made you choose that score?
- What do you see as the main advantages? IF NOT MENTIONED, PROBE FOR:
 - Price (free)
 - Simple yes/no answers
 - Quick
 - Secure
 - No third party involvement

- What do you see as the main drawbacks? IF NOT MENTIONED, PROBE FOR:
 - Using a computer/Internet
 - Feeling insecure sending information over the Internet
 - E-FILERS: Remains easier to use a third person to do it for them
 - PAPER FILERS: Lose the pleasure of doing it yourself on paper.
- Does it make you feel that this service would be easy to use?
 - Would it be easier than what (or who) you are using right now to file your taxes? Why or why not?
 - Are you confident that you could use it by yourself? How about with the help of a family member or a friend?
- Did you understand the language used? Was the wording clear?
- Is there anything missing? Information that should be included or explained better?
- Who thinks they would use this service? SHOW OF HANDS
- *For those who find this service appealing:*
 - What are the main reasons why you would consider using this service?
 - Is there anything that could make it even more interesting for you?
 - Do you think this could be appealing for people you know? Why?
- *For those who did not see it as appealing to them:*
 - What are the main reasons why you would not consider using this service?
 - Is there anything that could make it more interesting for you?
 - Do you think this could be appealing for people you know? Why?

Section 5 – Phone Version (20 minutes)

Now, I'd like to spend some time reviewing what the *File My Return* service could look like in its telephone version. Here is an information sheet that provides instructions on how to go about using this service over the phone. Please take a few minutes to review and feel free to write down any observations you may have while you're doing this.

Before we talk about it as a group, I want you to write down on the sheet in front of you a score of 1 to 10, where a score of 1 means that you do not find this idea interesting at all for you and 10 means that you find it extremely interesting.

- What score did you give this service on the scale of 1 to 10? SHOW OF HANDS
 - What made you choose that score?
- What do you see as the main advantages? IF NOT MENTIONED, PROBE FOR:
 - Price (free)
 - Simple yes/no answers
 - Quick
 - Secure
 - No third party involvement
- What do you see as the main drawbacks? IF NOT MENTIONED, PROBE FOR:

- Using a telephone / misunderstanding some questions / making mistakes
- Feeling insecure sending information over the phone.
- E-FILERS: Remains easier to use a third person to do it for them.
- PAPER FILERS: Lose the pleasure of doing it yourself on paper.
- Does it make you feel that this service would be easy to use?
 - Would it be easier than what (or who) you are using right now to fill your taxes? Why or why not?
 - Are you confident that you could use it by yourself? How about with the help of a family member or a friend?
- Was there anything that confused you?
- Is there anything missing? Information that should be included?
- Did you understand the language used? Was the wording clear?
- *For those who find this service appealing:*
 - What is the main reason why you would consider using this service?
 - Is there anything that could make it even more interesting for you?
 - Do you think this could be appealing for people you know? Why?
- *For those who did not see it as appealing to them:*
 - What is the main reason why you would not consider using this service?
 - Is there anything that could make it more interesting for you?
 - Do you think this could be appealing for people you know? Why?

Wrap-up (10 minutes)

- During the focus group, we've used the name "File my Return" to refer to the new service offering under consideration. Do you feel that this name accurately describes this new service? Why do you say that?
- Another name being considered is "Auto Complete". Would that be a better name than "File your Return"? Why do you say that?
- Is there a better name than the two we just discussed?
- Is this a service that you could recommend for people you know? Why or why not?
- Those are all the questions that I have for you this evening. Do you have any final comments or suggestions about the new service that could be offered that you would like to share?
- MODERATOR TO VISIT BACK ROOM TO ENSURE THAT ALL TOPICS HAVE BEEN COVERED ADEQUATELY.

THANK AND END GROUP.



3.1.5.2 *French Version*

**S'acquitter du mandat de services du gouvernement du Canada
Guide de discussion**

Introduction (10 minutes) :

- Présentez le modérateur et souhaitez la bienvenue aux participants du groupe de discussion.
 - Comme nous l'avons mentionné pendant le processus de recrutement, nous menons des groupes de discussion au nom du gouvernement du Canada. Au cours de la discussion de ce soir, nous voulons surtout savoir quelle a été votre expérience personnelle quant à la déclaration d'impôt sur le revenu et avoir votre opinion sur l'offre éventuelle d'un nouveau service par le gouvernement du Canada.
- La discussion durera environ deux heures. N'hésitez pas à quitter la séance, au besoin.
- Expliquez les points suivants :
 - Enregistrement audio et vidéo – La séance est enregistrée en format audio et vidéo aux fins d'analyse, au cas où il faudrait comparer le procès-verbal à nos notes. Nous conservons les enregistrements vidéo et ils ne seront remis à personne sans le consentement écrit de tous les participants.
 - Miroir sans tain/transmission en ligne – Des observateurs représentant le gouvernement se trouvent derrière le miroir et observent la discussion. Nous invitons toujours les clients à participer aux groupes de discussion et à écouter les opinions des répondants en personne, plutôt que d'attendre de lire un rapport.
 - Confidentialité – Veuillez noter que tous vos propos lors de ces discussions resteront tout à fait confidentiels. Nous n'attribuons pas de commentaires à des personnes précises. Notre rapport résume les conclusions des groupes de discussion, mais il ne mentionne aucun nom. On peut obtenir le rapport auprès de la Bibliothèque et Archives Canada ou sur le site Web www.porr-rrop.gc.ca.
- Expliquez le fonctionnement d'un groupe de discussion :
 - Les groupes de discussion sont conçus pour favoriser une discussion ouverte et honnête. Le rôle du modérateur consiste à orienter la discussion et à encourager tout le monde à participer. Il est également là pour s'assurer que la discussion reste centrée sur le sujet.
 - Votre rôle est de répondre aux questions et d'exprimer vos opinions. Nous voulons connaître les opinions majoritaires et minoritaires des membres du groupe de discussion, alors n'hésitez pas à émettre des commentaires, même si vous avez l'impression d'avoir une opinion différente de celle des autres membres du groupe. Peut-être que d'autres personnes seront d'accord avec vous. L'opinion de tous est importante et doit être respectée.
 - Je veux également insister sur le fait qu'il n'y a pas de bonnes ou de mauvaises réponses. Nous voulons simplement connaître vos opinions et vos attitudes. Il

n'était pas nécessaire d'être expert en fiscalité pour participer. Nous ne cherchons pas à mettre vos connaissances à l'épreuve.

- Veuillez noter que le modérateur n'est pas un employé du gouvernement du Canada et qu'il ne pourra peut-être pas répondre à certaines de vos questions.
- (Le modérateur se présente.) Les participants se présentent également, en ne donnant que leur prénom.
- Veuillez vous présenter brièvement au groupe comme vous le voulez; vous pouvez parler par exemple de votre situation familiale ou de vos passe-temps.

Section 1 – Discussion générale (10 minutes)

- J'aimerais que vous preniez la feuille et le stylo qui se trouvent devant vous, et que vous écriviez une ou deux choses qui vous viennent immédiatement à l'esprit lorsque vous pensez à la préparation et à la production de déclarations de revenus. Il n'est pas nécessaire de réfléchir; écrivez simplement ce qui vous vient immédiatement à l'esprit, peu importe ce que c'est. **LE MODÉRATEUR DOIT NOTER LES RÉPONSES SUR UN TABLEAU-PAPIER ET DEMANDER DES PRÉCISIONS :**
 - Quelles choses vous sont venues à l'esprit? Qu'est-ce qui vous a fait penser à ça?
 - Êtes-vous surpris des éléments figurant sur cette liste? Est-ce que certains d'entre eux vous frappent?

[LA SECTION 2 EST RÉSERVÉE AUX DÉCLARANTS PAR SUPPORT PAPIER]

Section 2 – Groupes de déclarants par support papier seulement (25 minutes)

Vous êtes ici en partie parce que vous avez tous préparé ou produit des déclarations de revenus sur papier l'année dernière. Mes prochaines questions portent sur cette expérience.

- Pour commencer, j'aimerais savoir combien d'entre vous ont préparé et produit une déclaration de revenus entièrement sur papier et combien d'entre vous ont préparé une déclaration à l'ordinateur, mais l'ont imprimée et envoyée par la poste ordinaire. **DEMANDER AUX PARTICIPANTS DE LEVER LA MAIN.**
- Trouvez-vous que le processus de préparation et de production d'une déclaration de revenus est simple ou compliqué? Pourquoi?
- Aimez-vous le faire? Veuillez préciser.
 - Pourquoi produisez-vous votre déclaration de revenus sur papier? **AU BESOIN, DEMANDER DES PRÉCISIONS SUR LES ASPECTS SUIVANTS :**
 - Vieille habitude/zone de confort
 - Simplicité

- Contrôle sur le processus
- Pas besoin de la technologie
- Y a-t-il des aspects négatifs pour vous? AU BESOIN, DEMANDER DES PRÉCISIONS SUR LES ASPECTS SUIVANTS :
 - Trop compliqué
 - Formulaires et directives difficiles à suivre
 - Prend trop de temps
 - Peur de se tromper
- Avez-vous eu des problèmes quand vous avez préparé ou produit vos déclarations de revenus au cours des dernières années? Dans l'affirmative, quel type de problèmes avez-vous eus?
- Avez-vous déjà essayé ou envisagé d'essayer une autre méthode que la production en format papier? Veuillez préciser.
 - Dans l'affirmative, quelle méthode avez-vous essayée ou envisagée d'essayer?
 - *Si vous avez essayé* : Quel a été le résultat? Pourquoi êtes-vous revenu à la méthode de production en format papier?
 - *Si vous n'avez pas essayé* : Pourquoi avez-vous changé d'idée?
- Envisageriez-vous de changer de méthode au cours des deux ou trois prochaines années?
 - Dans l'affirmative, quelles options examineriez-vous? Produire une déclaration par voie électronique vous-même, ou recourir aux services d'une entreprise de préparation de déclarations ou d'un comptable?
 - Pourquoi préférez-vous cette option?
 - SI VOUS PRÉFÉREZ LA PRODUCTION ÉLECTRONIQUE : Est-ce que le coût des services d'une entreprise de préparation de déclarations ou d'un comptable est un problème?
 - Dans la négative, quelles sont les principales raisons pour lesquelles vous refusez de changer de méthode?
 - Demander des précisions sur les aspects suivants : habitude, confort, contrôle sur le processus, peur d'utiliser le transfert électronique de données, manque d'aisance en informatique, peu ou pas d'accès à Internet, coût du recours à une aide externe ou à un logiciel.
 - Y a-t-il quelque chose qui vous convaincrerait d'adopter une autre méthode de production de déclarations?

[LA SECTION 3 EST RÉSERVÉE AUX DÉCLARANTS PAR VOIE ÉLECTRONIQUE]

Section 3 – Groupes de déclarants par voie électronique seulement (25 minutes)

Vous êtes ici en partie parce que vous avez tous préparé ou produit des déclarations de revenus par voie électronique, avez fait appel aux services d'une entreprise de préparation de

déclarations ou d'un comptable au cours des années précédentes ou avez reçu l'aide d'un bénévole de l'Agence du revenu du Canada.

- Levez la main si les énoncés suivants s'appliquent à vous :
 - Vous avez préparé et produit vos propres déclarations de revenus en ligne.
 - Vous avez fait appel aux services d'une entreprise de préparation de déclarations ou d'un comptable.
 - Vous avez fait appel aux services d'un bénévole de l'Agence du revenu du Canada.

Demandez à chaque sous-groupe :

- Trouvez-vous que le processus de préparation et de production d'une déclaration de revenus est simple ou compliqué? Pourquoi?
- Avez-vous eu des problèmes quand vous avez préparé ou produit vos déclarations de revenus au cours des dernières années? Dans l'affirmative, quel type de problèmes avez-vous eus?
- Depuis combien d'années utilisez-vous cette méthode pour préparer ou produire vos déclarations de revenus?
- DÉCLARANTS EN LIGNE : Aimez-vous le faire? Veuillez préciser.
 - Quels sont les aspects positifs, le cas échéant? AU BESOIN, DEMANDER DES PRÉCISIONS SUR LES ASPECTS SUIVANTS :
 - Vieille habitude/zone de confort
 - Simple/rapide
 - Contrôle sur le processus
 - Quels sont les aspects négatifs pour vous? AU BESOIN, DEMANDER DES PRÉCISIONS SUR LES ASPECTS SUIVANTS :
 - Trop compliqué
 - Trop coûteux
 - Formulaires et directives difficiles à suivre
 - Prend trop de temps
 - Transmission de renseignements personnels par Internet
 - Peur de se tromper
- DÉCLARANTS PAR VOIE ÉLECTRONIQUE : Dans l'ensemble, quel est votre degré de satisfaction à l'égard des services que vous avez reçus d'une entreprise de préparation de déclarations ou d'un comptable?
 - Quels sont les aspects positifs, le cas échéant? AU BESOIN, DEMANDER DES PRÉCISIONS SUR LES ASPECTS SUIVANTS :
 - Simple/rapide
 - Contrôle sur le processus
 - Quels sont les aspects négatifs pour vous? AU BESOIN, DEMANDER DES PRÉCISIONS SUR LES ASPECTS SUIVANTS :
 - Communication de renseignements personnels à une tierce partie
 - Trop coûteux
 - Peu ou pas de contrôle

- Peur que l'entreprise ou le comptable commette une erreur

DEMANDER À TOUS :

- Croyez-vous que vous profitez toujours de toutes les prestations et déductions auxquelles vous avez droit? Pourquoi? Y a-t-il des points particuliers qui vous inquiètent?
- Croyez-vous que ce processus garantit le respect de votre vie privée et la protection de vos renseignements personnels? Pourquoi?
 - *Pour les déclarants par voie électronique* : Y a-t-il des aspects de la communication de vos renseignements personnels à une tierce partie qui vous inquiètent?
 - *Pour les déclarants en ligne* : Y a-t-il des aspects de la communication de vos renseignements personnels sur Internet qui vous inquiètent?
- Envisageriez-vous de changer de méthode de préparation et de production d'une déclaration de revenus au cours des deux ou trois prochaines années?
 - Dans l'affirmative, quelles options examineriez-vous? Produire une déclaration par voie électronique vous-même, ou recourir aux services d'une entreprise de préparation de déclarations ou d'un comptable?
 - Pourquoi choisiriez-vous cette option?
 - DÉCLARANTS EN LIGNE : Est-ce que le coût des services d'une entreprise de préparation de déclarations ou d'un comptable est un problème?
 - Dans la négative, quelles sont les principales raisons pour lesquelles vous refusez de changer de méthode?
 - Demander des précisions sur les aspects suivants : habitude, confort, contrôle sur le processus, peur d'utiliser le transfert électronique de données, manque d'aisance en informatique, peu ou pas d'accès à Internet, coût du recours à une aide externe ou à un logiciel, etc.
 - Y a-t-il quelque chose qui vous convaincrerait d'adopter une autre méthode de production de déclarations?

Section 4 – Lettre d'invitation (20 minutes)

Dans cette section, je vais passer en revue une lettre d'invitation que pourraient recevoir les Canadiens possiblement admissibles au sujet d'un nouveau service, appelé *Produire ma déclaration de revenus*, qui pourrait être offert aux contribuables par le gouvernement du Canada. Nous allons discuter de ce nouveau service de manière détaillée au cours de la prochaine heure, mais avant, j'aimerais que vous preniez le temps de lire la lettre de présentation suivante.

LE MODÉRATEUR DOIT DISTRIBUER UN EXEMPLAIRE PAPIER DU DOCUMENT ET DEMANDER AUX RÉPONDANTS DE FAIRE CE QUI SUIT :

- J'aimerais que vous preniez le stylo qui se trouve devant vous et que vous fassiez certaines choses en lisant ce document. Tout d'abord, veuillez prendre le temps d'encrer les éléments que vous trouvez particulièrement bons, clairs ou intéressants. Ensuite, veuillez rayer les éléments que vous trouvez mauvais, peu clairs ou inintéressants. Troisièmement, veuillez prendre quelques instants pour accorder une

note de 1 à 10 au document. Une note de 1 signifie que vous trouvez cette idée totalement inintéressante, et une note de 10 signifie que vous la trouvez extrêmement intéressante. Vous pouvez inscrire la note en haut de la page.

LE MODÉRATEUR DOIT ACCORDER CINQ MINUTES AUX PARTICIPANTS POUR FAIRE L'EXERCICE.

- À MAIN LEVÉE, faites-vous une idée de la note accordée.
 - Pourquoi avez-vous attribué cette note?
- Quels sont les éléments que vous avez encadrés ou que vous avez trouvés particulièrement intéressants ou bons?
 - Pourquoi?
 - Si aucun participant ne l'a mentionné : que dites-vous du fait que ce service est gratuit? S'agit-il un aspect très intéressant pour vous?
- Quels sont les éléments que vous avez rayés ou que vous n'avez pas trouvés bons ou intéressants?
 - Pourquoi?
- Si vous receviez cette lettre, examinerez-vous ce service? Veuillez préciser.
 - Préférez-vous la version téléphonique ou la version en ligne? **LE MODÉRATEUR DOIT NOTER LE NOMBRE DE PERSONNES QUI CHOISSENT, À MAIN LEVÉE, LA VERSION TÉLÉPHONIQUE PAR RAPPORT À LA VERSION EN LIGNE.**
 - Pour les personnes qui préfèrent la version téléphonique : pourquoi préférez-vous cette version?
 - Seriez-vous totalement opposé à utiliser la version en ligne? Veuillez préciser.
 - Pour les personnes qui préfèrent la version en ligne : pourquoi préférez-vous cette version?
 - Seriez-vous totalement opposé à utiliser la version téléphonique? Veuillez préciser.
- *Pour les personnes qui ne sont pas intéressées par ce service :*
 - Quelles sont les principales raisons pour lesquelles vous n'envisageriez pas d'utiliser ce service?
 - **AU BESOIN, DEMANDER DES PRÉCISIONS SUR LES ASPECTS SUIVANTS :** Confiance en l'ARC quant à la simplicité, à la sécurité ou à l'exactitude; peur de perdre le contrôle sur leur déclaration de revenus.
 - Y a-t-il quelque chose qui rendrait ce service plus intéressant pour vous?
 - Croyez-vous que ce service pourrait intéresser des gens que vous connaissez? Pourquoi?
- La lettre est-elle claire? Y a-t-il quelque chose qui porte à confusion ou qui n'est pas clair?

- La lettre vous donne-t-elle une bonne idée de la manière dont ce service fonctionne?
- Avez-vous l'impression que ce service serait facile à utiliser?
 - Croyez-vous que vous pourriez l'utiliser tout seul?
- Manque-t-il quelque chose? Y a-t-il des renseignements qui devraient être ajoutés?
- Qu'est-ce qui rendrait ce service plus intéressant pour vous?

Section 4 – Version en ligne (30 minutes)

Dans cette section, nous verrons à quoi pourrait ressembler la version en ligne du service *Produire ma déclaration de revenus*. Je vais vous montrer une version de démonstration du service. Il ne s'agit pas d'une version définitive, mais simplement d'une version d'essai pour que nous puissions vous montrer les principales caractéristiques et vous donner une idée du fonctionnement de ce service. N'hésitez pas à prendre en note toutes vos observations pendant ma présentation. Si vous vous sentez perdu pendant la présentation ou que vous avez une question précise, veuillez m'en informer.

LE MODÉRATEUR DOIT PRÉSENTER INTÉGRALEMENT LE SERVICE À L'ÉCRAN, EN MONTRANT LES DIFFÉRENTES ÉTAPES DE LA VERSION DES PERSONNES CÉLIBATAIRES ET CELLE DES PERSONNES MARIÉES.

Avant que nous parlions du service en groupe, j'aimerais que vous écriviez, sur la feuille devant vous, une note de 1 à 10, où 1 signifie que vous trouvez cette idée totalement inintéressante, et une note de 10 signifie que vous la trouvez extrêmement intéressante.

- Sur l'échelle de 1 à 10, quelle note avez-vous accordée à ce service? À MAIN LEVÉE
 - Pourquoi avez-vous attribué cette note?
- Selon vous, quels sont les principaux avantages? SI AUCUN PARTICIPANT NE L'A MENTIONNÉ, DEMANDER DES PRÉCISIONS SUR LES ASPECTS SUIVANTS :
 - Prix (gratuit)
 - Simples réponses par oui ou par non
 - Rapide
 - Sécurisé
 - Aucune participation d'un tiers
- Selon vous, quels sont les principaux inconvénients? SI AUCUN PARTICIPANT NE L'A MENTIONNÉ, DEMANDER DES PRÉCISIONS SUR LES ASPECTS SUIVANTS :
 - Utilisation d'un ordinateur ou d'Internet
 - Sentiment d'incertitude quant à la transmission de renseignements sur Internet
 - DÉCLARANTS PAR VOIE ÉLECTRONIQUE : Il demeure plus simple de faire appel à un tiers pour préparer la déclaration.
 - DÉCLARANTS SUR SUPPORT PAPIER : On perd le plaisir de le faire soi-même sur papier.

- Avez-vous l'impression que ce service serait facile à utiliser?
 - Ce service serait-il plus pratique que la méthode que vous utilisez actuellement pour produire votre déclaration de revenus? Veuillez préciser.
 - Croyez-vous que vous pourriez l'utiliser tout seul? Et avec l'aide d'un membre de votre famille ou d'un ami?
- Comprenez-vous les termes utilisés? La formulation était-elle claire?
- Manque-t-il quelque chose? Quels renseignements devraient être ajoutés ou mieux expliqués?
- Qui parmi vous pense qu'il utiliserait ce service? À MAIN LEVÉE
- *Pour les personnes qui sont intéressées par ce service :*
 - Quelles sont les principales raisons pour lesquelles vous envisageriez d'utiliser ce service?
 - Y a-t-il quelque chose qui rendrait ce service encore plus intéressant pour vous?
 - Croyez-vous que ce service pourrait intéresser des gens que vous connaissez? Pourquoi?
- *Pour les personnes qui ne sont pas intéressées par ce service :*
 - Quelles sont les principales raisons pour lesquelles vous n'envisageriez pas d'utiliser ce service?
 - Y a-t-il quelque chose qui rendrait ce service plus intéressant pour vous?
 - Croyez-vous que ce service pourrait intéresser des gens que vous connaissez? Pourquoi?

Section 5 – Version téléphonique (20 minutes)

Dans cette section, nous verrons à quoi pourrait ressembler la version téléphonique du service *Produire ma déclaration de revenus*. Voici une feuille de renseignements qui fournit des instructions sur la manière d'utiliser ce service au téléphone. Veuillez prendre quelques minutes pour passer en revue ce document et n'hésitez pas à prendre en note toutes vos observations pendant la présentation.

Avant que nous parlions du service en groupe, j'aimerais que vous écriviez, sur la feuille devant vous, une note de 1 à 10, où 1 signifie que vous trouvez cette idée totalement inintéressante, et une note de 10 signifie que vous la trouvez extrêmement intéressante.

- Sur l'échelle de 1 à 10, quelle note avez-vous accordée à ce service? À MAIN LEVÉE
 - Pourquoi avez-vous attribué cette note?
- Selon vous, quels sont les principaux avantages? SI AUCUN PARTICIPANT NE L'A MENTIONNÉ, DEMANDER DES PRÉCISIONS SUR LES ASPECTS SUIVANTS :
 - Prix (gratuit)
 - Simples réponses par oui ou par non
 - Rapide

- Sécurisé
- Aucune participation d'un tiers
- Selon vous, quels sont les principaux inconvénients? SI AUCUN PARTICIPANT NE L'A MENTIONNÉ, DEMANDER DES PRÉCISIONS SUR LES ASPECTS SUIVANTS :
 - Utilisation d'un téléphone, mauvaise compréhension de certaines questions, possibilité de faire des erreurs
 - Sentiment d'incertitude quant à la transmission de renseignements par téléphone
 - DÉCLARANTS PAR VOIE ÉLECTRONIQUE : Il demeure plus simple de faire appel à un tiers pour préparer la déclaration.
 - DÉCLARANTS SUR SUPPORT PAPIER : On perd le plaisir de le faire soi-même sur papier.
- Avez-vous l'impression que ce service serait facile à utiliser?
 - Ce service serait-il plus pratique que la méthode que vous utilisez actuellement pour produire votre déclaration de revenus? Veuillez préciser.
 - Croyez-vous que vous pourriez l'utiliser tout seul? Et avec l'aide d'un membre de votre famille ou d'un ami?
- Y a-t-il quelque chose que vous avez trouvé déroutant?
- Manque-t-il quelque chose? Y a-t-il des renseignements qui devraient être ajoutés?
- Comprenez-vous les termes utilisés? La formulation était-elle claire?
- *Pour les personnes qui sont intéressées par ce service :*
 - Quelle est la principale raison pour laquelle vous envisageriez d'utiliser ce service?
 - Y a-t-il quelque chose qui rendrait ce service encore plus intéressant pour vous?
 - Croyez-vous que ce service pourrait intéresser des gens que vous connaissez? Pourquoi?
- *Pour les personnes qui ne sont pas intéressées par ce service :*
 - Quelle est la principale raison pour laquelle vous n'envisageriez pas d'utiliser ce service?
 - Y a-t-il quelque chose qui rendrait ce service plus intéressant pour vous?
 - Croyez-vous que ce service pourrait intéresser des gens que vous connaissez? Pourquoi?

Récapitulation (10 minutes)

- Lors de la séance de discussion en groupe, nous avons utilisé le nom « Produire ma déclaration de revenus » pour parler de la nouvelle offre de service actuellement à l'étude. Pensez-vous que ce nom décrit bien ce nouveau service? Pourquoi?
- Un autre nom envisagé est « Production automatique ». Serait-ce un meilleur nom que « Produire ma déclaration de revenus »? Pourquoi?
- Existe-t-il un meilleur nom que les deux noms dont nous venons de parler?

- S'agit-il d'un service que vous recommanderiez aux gens que vous connaissez? Veuillez préciser.
- Je n'ai pas d'autres questions à vous poser ce soir. Pour finir, avez-vous des commentaires ou des suggestions à donner au sujet du nouveau service qui pourrait être offert?
- LE MODÉRATEUR DOIT SE RENDRE DANS L'ARRIÈRE-SALLE POUR S'ASSURER QUE TOUS LES SUJETS ONT ÉTÉ ABORDÉS DE MANIÈRE ADÉQUATE.

REMERCIER LE GROUPE ET METTRE FIN À LA DISCUSSION.



3.1.6 Invitation Letter

3.1.6.1 English Version

First and Last Name
C/O address, if applicable
123 Any Street
City PR A1A 1A1

Dear First and Last Name:

We are writing to invite you to file your income tax and benefits return using our new "*File my return*" service. Based on your filing history, we believe you may be eligible to use this new service.

The new "*File my return*" service is free and allows you to file your return in a fast, easy and secure way, with no paper forms to complete.

You can use the "*File my return*" service if, during 2016:

- You had no income **or** your only income was from Old Age Security pension, Canada or Quebec Pension Plan benefits, Employment Insurance benefits, Workers' compensation benefits, Social assistance payments and/or Net federal supplements;
- You are not reporting the sale of your principal residence in 2016; **and**
- The total of your taxable income was less than \$XX,XXX.

You can access the "*File my return*" service by calling 1-800-XXX-XXXX number or by logging into My Account. If you are not already registered with My Account, you can register at cra.gc.ca/myaccount.

Once in the "*File my return*" service, you will only have to answer a few yes or no questions and if applicable, provide any additional information regarding the provincial benefit amounts and certain provincial refundable tax credits that you can claim to file your return. Based on the information in our records, we will automatically include your income and applicable non-refundable tax credits. Your *Notice of Assessment* will confirm the amounts and will renew any federal and/or provincial or territorial benefit payments.

If you do not meet the conditions to use the "*File my return*" service, you can still file your return using any of the other filing methods currently available. For more information, visit www.cra.gc.ca.

We hope you will take advantage of the new "*File my return*" service designed just for you.



3.1.6.2 French Version

Prénom et Nom de famille
a/s de Adresse, s'il y a lieu
123, rue Toute
Ville, PR A1A 1A1

Madame,
Monsieur,

Nous vous écrivons pour vous inviter à produire votre déclaration de revenus et de prestations au moyen de notre nouveau service « *Produire ma déclaration* ». Selon vos antécédents de déclaration, nous croyons que vous pourriez être admissible à utiliser ce nouveau service.

Le nouveau service « *Produire ma déclaration* » est gratuit et vous permet de produire votre déclaration de façon rapide, simple et sécurisée, sans avoir à remplir de formulaires papier.

Vous pouvez utiliser le service « *Produire ma déclaration* » si, en 2016 :

- vous n'avez aucun revenu **ou** votre seul revenu provenait de prestations de la pension de la Sécurité de la vieillesse, du Régime de rentes du Québec ou du Régime de pensions du Canada, d'assurance-emploi, d'indemnités d'accident du travail, d'allocations d'aide sociale et/ou de versement net des suppléments fédéraux;
- vous ne déclarez pas la vente de votre résidence principale en 2016; **et**
- le total de votre revenu imposable était inférieur à XX XXX,XX \$.

Vous pouvez accéder au service « *Produire ma déclaration* » en composant le 1-800-XXX-XXXX ou en vous connectant à Mon dossier. Si vous n'êtes pas encore inscrit à Mon dossier, inscrivez-vous à arc.gc.ca/mondossier.

Une fois dans le service « *Produire ma déclaration* », vous n'aurez qu'à répondre par oui ou par non à quelques questions et, s'il y a lieu, fournir des renseignements supplémentaires concernant les montants de prestations provinciales et certains crédits d'impôt provinciaux remboursables que vous pouvez demander pour produire votre déclaration. En nous basant sur les renseignements qui figurent dans nos dossiers, nous incluons automatiquement votre revenu et les crédits d'impôt non remboursables applicables. Votre avis de cotisation confirmera les montants et renouvèlera tout paiement de prestations provinciales ou territoriales.



Si vous ne remplissez pas les conditions d'utilisation du service « *Produire ma déclaration* », vous pouvez toujours avoir recours à l'une des autres méthodes de production actuellement disponibles. Pour en savoir plus, visitez www.arc.gc.ca.

Nous espérons que vous profiterez du nouveau service « *Produire ma déclaration* » conçu juste pour vous.



3.1.7 Phone Service Information Sheet

3.1.7.1 English Version (Ontario Example)

FILE MY RETURN INFORMATION SHEET

Here's how to file your 20XX return:

1. Dial **1-800-xxx-xxxx**.
2. Select your language. Press **1** for English or **0** for French.
3. Enter your 9 digit social insurance number.
4. Enter your date of birth in the following format: YYYY MM DD
5. Confirm the following information is correct:

Marital Status on December 31, 20XX:	Single
Last three digits of your spouse's SIN:	XXX XXX 123
Province of Residence on December 31, 20XX:	Ontario
Your address:	As shown on reverse

6. If you are married or living common-law, the system will ask you to enter your spouse or common-law partner's net income. Record it here _____.
7. Answer *yes* (**1**) or *no* (**0**) to the Elections Canada consent question.
8. Answer *yes* (**1**) or *no* (**0**) to confirm that you had no income **OR** your only source of income in 20XX was from the Old Age Security, Canada or Quebec Pension Plan, Employment Insurance benefits, Workers' compensation benefits, Social assistance payments and/or net Federal supplements.
 - If you **press 1**, the service will continue to Question 9. If you **press 0** and have any other type of income to report, you cannot use the "File My Return" service. The system will direct you to the CRA website where other filing methods can be found.
9. Answer *yes* (**1**) or *no* (**0**) to the question that asks if you have sold your principal residence in 2016?
 - If you **press 0**, the service will continue to Question 10. If you **press 1**, you cannot use the "File My Return" service. The system will direct you to the CRA website where other filing methods can be found.
10. Answer *yes* (**1**) or *no* (**0**) to the question that asks if you are applying for the 20XX Ontario Trillium benefit and the Ontario Senior Homeowners' Property Tax Grant.
 - If you **press 1**, the service will continue to Question 11. If you **press 0**, the service will skip to Question 15.
11. Answer *yes* (**1**) or *no* (**0**) to the question that asks if you want to receive your Ontario Trillium benefit in one payment at the end of the benefit year (i.e. June 20XX) instead of receiving it monthly.

12. Answer *yes* (1) or *no* (0) if you are married or living common-law, you and your spouse or common-law partner occupied separate residences for medical reasons, and you are choosing to apply individually for the Ontario Trillium benefits.
13. The service will now ask you to enter (in dollars only) one or more of the following amounts that apply to you:
- Total Rent paid in 20XX: _____
 - Total Property tax paid in 20XX: _____
 - Home energy costs paid for a principal residence on a reserve in 20XX: _____
 - Total amount paid for accommodations in a public long-term care home in 20XX: _____.

Note: When finished entering an amount, press the # key.

14. Answer *yes* (1) or *no* (0) to the question that asks did you reside in a designated student residence in Ontario in 20XX.
15. Answer *yes* (1) or *no* (0) to the question that asks if you are claiming any Ontario Credits. If you **press 1**, the service will continue to Question 16. If you press 0, the service will skip to Question 17.
16. The service will now ask you to enter (in dollars only) one or more of the following amounts to apply to you:
- Ontario children's activity tax credit: _____
 - Ontario healthy homes renovation tax credit: _____
 - Ontario political contribution tax credit: _____

Note: When finished entering an amount, press the # key.

17. Answer *yes* (1) or *no* (0) to confirm that you want the Canada Revenue Agency to consider this information as your income tax return.
- If you **press 1**, the service will give you your **confirmation number**. Record it here: _____. It is your proof that we have received your return. If you **press 0**, the service will not save the information provided and will not issue a confirmation number.

Note: If at any time you want a question repeated, press the star key (*). Keep this sheet for your records and thank you for using the new "File My Return" service.

3.1.7.2 French Version (Generic)

PRODUIRE MA DÉCLARATION – FEUILLE DE RENSEIGNEMENTS

Voici comment produire votre déclaration 20XX :

1. Composez **1-800-xxx-xxxx**.
2. Choisissez la langue de votre choix. Appuyez sur le **1** pour anglais ou le **0** pour français.
3. Inscrivez les neuf (9) chiffres de votre numéro d'assurance sociale.
4. Inscrivez votre date de naissance selon le format suivant : AAAA MM JJ
5. Confirmer l'exactitude des renseignements suivants :

État civil le 31 décembre 20XX:	Célibataire
Trois derniers chiffres du NAS de votre conjoint :	XXX XXX 123
Province de résidence au 31 décembre 20XX :	XXXXXXXXXXXXXXXXXX
Votre adresse :	Comme indiqué au verso

6. Si vous êtes marié ou si vous vivez en union libre, veuillez indiquer le revenu net de votre époux ou conjoint de fait. Inscrivez-le ici : _____.
7. Répondez *oui* (**1**) ou *non* (**0**) à la question de consentement d'Élections Canada.
8. Répondez *oui* (**1**) ou *non* (**0**) à la question confirmant que vous n'avez reçu aucun revenu **OU** que votre seule source de revenu en 20XX provenait de PSV, RPP/RPQ, AE., de prestations versées par la Commission des accidents de travail, de versements d'aide sociale et/ou de versements nets de suppléments fédéraux.
 - Si vous **appuyez sur le 1**, le service passera à la question 9. Si vous **appuyez sur le 0** pour déclarer tout autre type de revenu, vous ne pourrez pas utiliser le service « *Produire ma déclaration* », le système vous redirigera au site Web de l'ARC où se trouvent d'autres méthodes de production.
9. Répondez *oui* (**1**) ou *non* (**0**) lorsqu'on vous demandera si vous avez vendu votre résidence principale en 2016?
 - Si vous **appuyez sur le 0**, le service passera à la question 10. Si vous **appuyez sur le 1**, vous ne pourrez pas utiliser le service « *Produire ma déclaration* ». Le système vous redirigera au site Web de l'ARC où se trouvent d'autres méthodes de production.
10. Répondez *oui* (**1**) ou *non* (**0**) lorsqu'on vous demandera si vous voulez que l'Agence du revenu du Canada tienne compte de ces renseignements comme étant votre déclaration de revenus et de prestations.
Si vous **appuyez sur le 1**, le service vous donnera votre **numéro de confirmation**.

Inscrivez-le ici : _____. C'est la preuve que nous avons reçu votre déclaration.
Si vous **appuyez sur le « 0 »**, le service n'enregistrera pas les renseignements fournis et n'émettra pas un numéro de confirmation. Le service vous indiquera de revoir les directives, d'essayer le service « *Produire ma déclaration* » un peu plus tard ou de trouver d'autres méthodes de production à arc.gc.ca.

Remarque : Si vous désirez que l'on répète une question, appuyez sur la touche étoile (*).
Conservez cette feuille pour vos dossiers. Nous vous remercions d'utiliser le nouveau service « *Produire ma déclaration* ».



3.1.8 Online Demonstration of *File My Return*

3.1.8.1 English Version (Nova Scotia Example)

Access File My Return within MyAccount

The screenshot displays the Canada Revenue Agency's MyAccount interface. At the top, there is a navigation bar with the Government of Canada logo, the text 'Government of Canada / Gouvernement du Canada', and a 'Français' language selector. Below this is a blue header with the 'Canada Revenue Agency' logo and a red maple leaf. A 'Logout' button is visible in the top right corner.

The main content area features a navigation menu with options: Home, Tax returns, Accounts and payments, Benefits and credits, RRSP and savings plans, and Personal information. The user is greeted with 'Welcome, YOUR NAME'.

Key sections include:

- View mail:** A notification that the user has 1 unread item.
- File My Return:** A section titled 'File My Return' with a sub-header 'You may be eligible to use the new File My Return service'. Below this is a dropdown menu for selecting a province or territory. The 'Nova Scotia Resident' option is selected, and a sub-menu shows 'Single' as the chosen status.
- Manage online mail:** A section with a sub-header 'Manage online mail' and a link to 'Register for online mail to receive your correspondence (and other eligible correspondence as it becomes available) electronically in electronic format and reassessment (and other eligible correspondence as it becomes available) electronically in electronic format by regular mail.'
- Important information:** A section with a sub-header 'Important information' containing several notices:
 - Your 2016 return has not been received.
 - Your 2015 return was assessed and filed on 12, 2016. (Link: View your 2015 Notice of Assessment)
 - View your T4 and other tax slip information.

At the bottom right, the screen ID is 'MAO a1a' and the date modified is '2016-02-15'. A 'Terms and conditions' link is located at the bottom left.

File My Return

Government of Canada / Gouvernement du Canada

Français

Canada Revenue Agency

Canada

Logout

My Account

- View mail
- Manage mail
- File My Return
- Change my return
- Change my address and phone number(s)
- Apply for child benefits
- Arrange my direct deposit
- Authorize my representative
- Pay by pre-authorized debit
- Proof of income statement (option 'C' print)
- Request a remittance voucher
- Register my formal dispute

Home
Tax returns
Accounts and payments
Benefits and credits
RRSP and savings plans
Personal information

File my return

We have the following identification information on file for you: [Help with this page](#)

Mailing address:
123 ARGYLE STREET
HALIFAX NS B3J 3N8

Email address: TEST@TEST.CA

Province of residence on December 31, 2016: Nova Scotia

Marital status on December 31, 2016: Single

*** Is the above information correct?**

Yes No

The sale of your principal residence must now be reported, along with any principal residence designation. Have you sold your principal residence in 2016? [?](#)

Yes No

Were you a listed volunteer firefighter or a ground search and rescue volunteer for a minimum of six months during the period of January 1 to December 31?

Yes No

Are you a Canadian citizen?

Yes No

Can you confirm that in 2016, you had **no income** or your **only income** was from one or more the following sources:

- Old Age Security (OAS);
- Canada or Quebec Pension Plans (CPP/QPP);
- Universal Child Care Benefit (UCCB);
- Worker's Compensation Benefit;
- Social Assistance Benefit;
- Employment Insurance Benefit; and/or
- Net Federal Supplements

Yes No

Do you want the CRA to consider this information as your income tax return?

Yes No

Note: If you agree and want to file now, click "I agree - File my return!" below. Once filed, you will receive a confirmation number. Keep this number for your records.

Previous
I agree - File my return!

Screen ID: FMR_2NS

Date modified: 2016-02-15

[Terms and conditions](#)



File My Return - Confirmation

Government of Canada / Gouvernement du Canada Français

Canada Revenue Agency  Canada

[Logout](#)

- My Account**
- View mail
- Manage mail
- File My Return
- Change my return
- Change my address and phone number(s)
- Apply for child benefits
- Arrange my direct deposit
- Authorize my representative
- Pay by pre-authorized debit
- Proof of income statement (option 'C' print)
- Request a remittance voucher
- Register my formal dispute

- Home
- Tax returns**
- Accounts and payments
- Benefits and credits
- RRSP and savings plans
- Personal information

File my return - Confirmation

Thank you for using File My Return.

[Help with this page](#)

Please **keep this confirmation number** for your records:

XXXXXXXXXXXX

Tax year: 2016

Confirmation of receipt: 2017-06-12 12//02:38:37 (Eastern Time)

Your return will be verified using the same criteria that we apply to other filing methods. You are required to keep all your receipts and supporting documents in case we ask to see them.

Print this page for your records.

[Print](#) [Return to home page](#)

Screen ID: FMR.4

Date modified: 2016-02-15

[Terms and conditions](#)



3.1.8.2 French Version (Quebec)

Accéder à Produire ma déclaration dans Mon dossier

The screenshot displays the CRA 'Mon dossier' portal. At the top, it identifies the user as 'Bienvenue, VOTRE NOM'. The main navigation includes 'Page d'accueil', 'Déclarations de revenu', 'Comptes et paiements', 'Prestations et crédits', 'REER et régimes d'épargne', and 'Sommaire du client'. The left sidebar lists various account management tasks such as 'Voir le courrier', 'Gérer le courrier en ligne', and 'Produire ma déclaration'. The central content area highlights 'Produire ma déclaration' with a dropdown menu for marital status: 'Célibataire', 'Marié(e) ou Conjoint(e) de fait', and 'Veuf'. Below this, a 'Renseignements importants' section provides updates on tax return processing for 2016 and 2015.

Produire ma déclaration

Agence du revenu du Canada
Canada

[Fermer la session](#)

Page d'accueil

Déclarations de revenu

Comptes et paiements

Prestations et crédits

REER et régimes d'épargne

Sommaire du client

Mon dossier

- Voir le courrier
- Gérer le courrier en ligne
- Produire ma déclaration
- Modifier ma déclaration
- Changer mon adresse et mes numéros de téléphone
- Demander des prestations pour enfants
- Soumettre des documents
- Organiser mon dépôt direct
- Authoriser mon représentant
- Payer par débit préautorisé
- Relevé – Preuve de revenu (imprimé de l'option 'C')
- Demande d'une pièce de versement
- Enregistrer mon avis de différend officiel

Produire ma déclaration

[Aide pour cette page](#)

Votre fichier contient les informations d'identification suivantes:

Adresse postale:
389 SAINT LAURENT BOULEVARD
QUEBEC QC G1C 1C5

Adresse de courriel: TEST@TEST.CA

Province de résidence le 31 décembre 2016: Québec

État civil le 31 décembre 2016: Célibataire

* Est-ce que les informations plus haut sont exactes?

Oui Non

La vente de votre résidence principale doit maintenant être déclarée, ainsi que toute désignation de résidence principale. Avez-vous vendu votre résidence principale en 2016?

Oui Non

Êtes-vous citoyen canadien?

Oui Non

Pouvez-vous confirmer qu'en 2016 vous n'aviez aucun revenu ou, si vous en aviez, votre seul revenu provenait d'une ou plusieurs des sources suivantes:

- Pension de sécurité de la vieillesse (PSV);
- Régime de pension du Canada ou Régime de rentes du Québec (RPC/RRQ);
- Prestation universelle pour la garde d'enfants (FUGE);
- Indemnités pour accidents du travail;
- Prestation d'assistance sociale;
- Prestation d'assurance-emploi; et/ou
- Versement net des suppléments fédéraux

Oui Non

Est-ce que vous voulez que ces données soient enregistrées comme étant votre déclaration de revenus?

Oui Non

Remarque: Si vous êtes d'accord et souhaitez maintenant soumettre votre déclaration, cliquez "J'accepte - déposer ma déclaration". Une fois déposé, vous recevrez un numéro de confirmation. Conservez ce numéro pour vos dossiers.

Précédent

J'accepte - déposer ma déclaration!

Numéro d'écran: PMD.2QC

Date de modification: 2016-10-24



Produire ma déclaration - Confirmation

Gouvernement du Canada / Government of Canada English

Agence du revenu du Canada Canada

[Fermer la session](#)

Page d'accueil	Déclarations de revenu	Comptes et paiements	Prestations et crédits	REER et régimes d'épargne	Sommaire du client
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Mon dossier

- Voir le courrier
- Gérer le courrier en ligne
- Produire ma déclaration
- Modifier ma déclaration
- Changer mon adresse et mes numéros de téléphone
- Demander des prestations pour enfants
- Soumettre des documents
- Organiser mon dépôt direct
- Authoriser mon représentant
- Payer par débit préautorisé
- Relevé – Preuve de revenu (imprimé de l'option 'C')
- Demande d'une pièce de versement
- Enregistrer mon avis de différend officiel
- Demande de renseignements sur les données du client

Produire ma déclaration - Confirmation [Aide pour cette page](#)

Merci d'avoir utilisé le service Produire ma déclaration.

Veillez **conserver ce numéro de confirmation** pour vos dossiers:

XXXXXXXXXXXX

Année d'imposition: 2016

Confirmation de réception: 2017-06-12 12/02:38:37 (Eastern Time)

+ Votre déclaration sera vérifiée en utilisant les mêmes critères que ceux que nous appliquons à d'autres méthodes de classement. Vous devez conserver tous vos reçus et pièces justificatives au cas où nous les demanderions.

Imprimer cette page pour vos dossiers.

Numéro d'écran : PMD.4

Date de modification : 2016-05-16



Avis

3.1.9 Data Tables

DATA TABLES PRESENTED SEPARATELY

