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Digital Services Modernization Study

Executive Summary

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October 2018

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Executive Summary

This public opinion research report presents the results of a series of focus groups conducted by Phoenix Strategic Perspectives Inc. (Phoenix SPI) on behalf of the Canada Revenue Agency (CRA).

Background and Research Objectives

With the adoption of digital services by the Government of Canada, there is a clear objective that departments and agencies focus on the citizen experience to increase satisfaction with, and use of, these services. Previous public opinion research had given CRA a clear understanding as to why clients want specific digital services. This research was intended to help CRA understand how to design and deliver these services to best meet clients' needs and preferences. More specifically, the research was designed to help clarify preferences and expectations regarding potential new digital services in the following areas: status updates, electronic notifications, and online communication channels for enquiries or assistance. Findings from the research will assist in the design and delivery of future digital services and will help CRA determine which services to make a priority.

Methodology

Eight in-person focus groups were conducted in four locations: Halifax (English), Montreal (French), Toronto (English), and Calgary (English). The target audiences were registered users of CRA's My Account who had logged into the service within the last year as well as non-users of My Account who use private sector digital services, and who had an online transaction with any level of government in the last year. Six groups were conducted with My Account users and two groups were conducted with non-users of CRA's My Account. The focus groups were held between September 24th and 27th, 2018 with between eight and ten participants taking part in each discussion group.

This research was qualitative in nature, not quantitative. As such, the results provide an indication of participants' views about the issues explored, but they cannot be generalized to the full population of members of the targeted audience segments.

Key Findings

Nearly everyone has had experience tracking the status of an online transaction with other private and public organizations and consider such updates to be useful.

Virtually all participants said they have tracked the status of an online transaction over the past year. Participants were generally able to receive updates at various stages/steps of the transaction in question. For example, purchases were able to be tracked from the submission of an order through various stages of the delivery process (e.g. 'ready to ship', 'shipped', 'at distribution center'), to delivery. Applications were able to be tracked from confirmation of receipt, through the processing phase (i.e. 'in progress', 'in review', 'review completed'), to the final decision. Participants described such updates as useful because they provide peace of mind and reassurance, facilitate planning/scheduling, enhance predictability, and facilitate tracking by eliminating/reducing the need to initiate contact oneself.

Ability to track the status of files, applications or transactions with CRA seen as important. An online chat function and comprehensive FAQs were frequently mentioned as options that will minimize the likelihood of calling CRA after reviewing an online update.

When it comes to interactions or dealings with CRA, participants most often identified benefit applications, direct deposits, tax returns, and payments made to CRA as things it would be important for them to track. The types of information they would expect or want in such updates include the following: confirmation of receipt, notice of a status change, anticipated timelines (e.g. processing timelines, expected completion dates, and, if they occur, notification of delays), next steps in a process, contact information for technical issues or questions, upcoming deadlines or important dates to keep in mind, adjustments/corrections, issues/outstanding documentation required, and completion of a file, application or transaction. Participants mentioned a variety of things that would minimize the likelihood of contacting CRA by phone following the review of an online update. The two most frequently identified were an online chat function and a comprehensive Frequently Asked Questions (FAQs) section on CRA's website.

Widespread support for CRA using electronic notifications. Clear preference for these notifications to contain limited content and to be delivered via email as opposed to text.

Nearly everyone said they would want or expect CRA to deliver electronic notifications alerting them to a change in the status of their file. The types of notifications participants routinely said they would want or expect to receive included the following: notification that personal information has been successfully changed, that a file has moved from one stage to another, that the processing of a file is delayed, that the processing of a file is complete, that there is a problem with a file, that an issue related to a file is urgent or time-sensitive, and that there is a security-related issues or concern.

For reasons of security, there was widespread preference that electronic notifications be general in nature. Most participants indicated that they are comfortable being informed about the theme or topic of the notification. In addition, most participants said they would prefer to receive electronic notifications from CRA via email. The most frequently given reason for preferring email was the impression that it is more private. Some participants noted that incoming text messages can be set to display on the lock screen of a mobile device or even read aloud to the recipient through "text by voice" apps. Other reasons for preferring email included the impression that text messaging is for more personal interactions or entertainment and that email notifications are easier to track/inventory.

Participants were unanimous that CRA should offer an online communication channel for enquiries or assistance.

Support for the introduction of an online communication channel for enquires or assistance was strong, with participants suggesting real-time online chat and email services. Probing revealed that there was also widespread support for a service to submit an enquiry via My Account. Subject to one important caveat, participants expressed few concerns about sending tax questions to CRA via online communication channels. The caveat in question is that any communication of a personal or confidential nature would take place within the secure environment of My Account. While acknowledging that specific circumstances or issues might result in exceptions, there was a widespread assumption that their

expectations and needs regarding enquiries and assistance from CRA can reasonably be met through online interaction, either live chat or email.

Regarding acceptable response times, the general expectation was that communication via live chat should result in resolution of an issue in the course of the online interaction. At the very least, queries should be acknowledged immediately and responses that do not resolve the issue should provide a realistic estimation of the timeline associated with the query. For communication via email, participants also expect immediate acknowledgement of receipt of their enquiry and a realistic sense of the response time. The general expectation is that email queries can be resolved within one business day, although some participants were willing to extend this to two business days.

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