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Développement social Canada

# Qualitative Client Experience Research on Service Channel Access

## Final Report

### Prepared for Employment and Social Development Canada

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Canada 

## Qualitative Client Experience Research on Service Channel Access

Final Report  
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Supplier name: Phoenix SPI  
March 2022

This public opinion research report presents the results of qualitative research conducted to explore client experience accessing and using service channels. The fieldwork was conducted between July 27 and December 13, 2021.

It is available upon request in multiple formats (large print, MP3, braille, audio CD, e-text CD, DAISY or accessible PDF), by contacting 1 800 O-Canada (1-800-622-6232). By teletypewriter (TTY), call 1-800-926-9105.

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## Recherche qualitative de l'expérience client sur l'accès aux modes de prestation de services

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## Executive Summary

Phoenix Strategic Perspectives (Phoenix SPI) was commissioned by the Citizen Service Branch of Employment and Social Development Canada (ESDC) to conduct client experience qualitative research on service channel access.

### 1. Research Purpose and Objectives

Service delivery is fundamental to achieving ESDC's mandate and contributes to the achievement of policy and program results. The research was initiated to 1) understand whether newly adapted channels<sup>1</sup> introduced during the pandemic were working for ESDC's most vulnerable clients; and 2) support the development of the Department's Accessibility Roadmap. This research included long-established service channels (e.g., online, telephone) and the Department's newly adapted service channels.

The objectives of this research study were to: identify what aspects of service channel design and delivery are working well; determine what, if anything, needs to be changed to remove barriers to access for clients with various types of disability; assess whether the adapted service channels provide ease of access to different client groups; determine what, if any, service barriers exist in the service channel design and delivery; and identify what changes, if any, to design and delivery are needed to remove barriers to access.

### 2. Methodology

A qualitative research approach was used to meet the objectives. Specifically, the research included 12 virtual sessions (mini focus groups, dyads, and one-on-one interviews) and 105 in-depth telephone interviews conducted between July 27 and December 13, 2021.<sup>2</sup> In total, 129 clients participated in this research study. Recruitment was undertaken by telephone and email using program and channel lists provided by Service Canada. Participants included persons with a disability, seniors, youth, 'e-vulnerable' clients (i.e., those who rarely or never use online services and who are not very or not at all comfortable using online services), and 'newcomers' (i.e., immigrants who arrived in Canada in the last three years). More details about the methodology can be found in the [Appendix: Technical Specifications](#).

### 3. Limitations and Use of the Research Results

This research was qualitative. Qualitative research is designed to reveal a rich range of opinions and interpretations rather than to measure what percentage of the target population holds a given opinion. As such, the results indicate clients' views about the issues explored, but they cannot be generalized to the full population of clients with a disability and clients who used Service Canada's adapted service channels. With the foregoing in mind, the results of this research will be used by ESDC to identify opportunities for service improvements in the context of the ESDC Accessibility Roadmap. In addition, the Citizen Services Branch of Service Canada will use the results to improve the design and/or implementation of its service channels to ensure access to programs and services.

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<sup>1</sup> This included eServiceCanada, Service Canada Centres – eSIN, and eCommunity Outreach Liaison Service (eCOLS).

<sup>2</sup> The fieldwork was suspended during the electoral period for the 44<sup>th</sup> general election, from August 15, when the election was called, to October 26, 2021, when caretaker period concluded.

#### 4. Key Findings and Conclusions

***There was widespread satisfaction among research participants with their experience contacting Service Canada.***

- Most clients expressed at least some degree of satisfaction or said they got what they needed when describing their overall experience interacting with Service Canada. In particular, all clients who participated in the research were very satisfied with the professionalism, attitude, courtesy, and respectfulness of Service Canada personnel.
- Moreover, most clients with a disability who dealt with Service Canada staff described the latter as properly trained and equipped to meet their specific needs. When explaining why they felt this way, clients with a disability pointed to staff's understanding, patience, proactivity, sensitivity, and help finding or completing forms.

***Notwithstanding the positive experiences described by many research participants, some encountered problems with their interactions with Service Canada.***

- Commonly identified issues or problems included navigating the Service Canada website, wait times when contacting Service Canada's specialized call centres, lack of clear and consistent information, and the inability to resolve an issue or complete a transaction in one service interaction.
- Other barriers or challenges encountered by research participants were linked to a specific program. By design, this included the CPP disability (CPP-D) program, Employment Insurance (EI) Sickness, and the Social Insurance Number (SIN) program. While few participants reported issues in relation to EI Sickness or SIN, clients with a disability experienced problems in relation to the CPP-D program throughout their journey.
- Many clients with a disability who sought information on Service Canada's website could not find what they were looking for or needed assistance understanding the information they did find. When it came to applying for CPP-D, the most frequently identified challenges related to the length of the application form, as well as the amount, and type, of information required to complete the form. Few CPP-D clients identified challenges when following up on their application. Among those who did, difficulty using the Service Canada website and wait times when contacting Service Canada's specialized call centre were most common.

***Overall, feedback on the newly adapted service channels was positive, with users routinely expressing satisfaction with them.***

- Service Canada clients who used the newly adapted channels typically described them as clear, easy to use, convenient, and useful in relation to their transactions with Service Canada. Users of these channels routinely indicated that they would recommend them to someone they knew who needed help with applying for a benefit or SIN.
- Critical feedback from clients who used the adapted service channels was limited. For those who used eServiceCanada, the main issue raised about the service was the two-business day wait time, which was not helpful for those who needed immediate assistance. In addition, the timeframe of two business days for being contacted by a Service Canada agent was viewed as not precise enough for some research participants. They wanted to know the time of day to expect to hear from Service Canada to ensure they did not miss the call. Concerns related to eSIN tended to focus on technical problems or glitches trying to submit the form online. The

only concern raised about eCOLS was reliability—that is, call disconnections (i.e., dropped calls) and telephone latency or call quality.

***Clients identified a variety of things Service Canada could do to address some of the challenges they faced and/or to make access to its programs more user-friendly.*** The most frequently identified suggestions are included below, and they are organized by the service channel.

- ***Telephone.*** Suggestions to improve the service provided by the specialized call centres tended to focus on reducing wait times—for example, having more agents answering calls during peak hours, extending call centre hours, keeping call centres open on weekends, and offering the option to schedule a callback rather than wait on hold for the next available agent. In addition to addressing wait times, research participants offered several suggestions to help maximize the likelihood that their inquiry/reason for calling could be addressed in its entirety during the call. This included having phone agents who are more knowledgeable about program details and requirements; delegating more authority to front-line call centre staff so they can review a client’s file and help address the issue or inquiry; facilitating phone transfers to management if a phone agent cannot resolve a client’s issue; and storing client information as part of call records so clients do not need to repeat information already provided, and agents do not need to put clients on hold to go check information.
- ***Service Canada website.*** Suggestions to improve the Service Canada website focused on making the site more user-friendly and easier to navigate—for example, adding Frequently Asked Questions sections for various programs, making it easier to locate application instructions, improving the search function, and providing direct links to commonly requested forms. In addition, some research participants suggested adding a real-time chat service that could be accessed through the website.
- ***eServiceCanada.*** Suggestions included offering the ability to specify or narrow the timeframe for a callback appointment and/or to suggest times for the appointment; having Service Canada representatives call back more than twice; providing an ‘other specify’ option in the ‘How can we help you?’ section for clients to use to fully describe the nature of the issue; and allowing CPP-D clients who do not have a terminal illness to use the service.

***Several conclusions can be drawn from the research findings, each of which has implications for Service Canada when it comes to service channel design and delivery.***

- For some clients, the service channels they choose to use to interact with Service Canada are dependent on the nature of the intended service interaction. In other words, these clients select the service channel that, in their view, is best suited to the service interaction. This suggests a potential need to reconsider future service channel design and/or improvements from the perspective of function. For example, if clients prefer to use Service Canada’s website for quick access to things like application forms, these forms should be clearly accessible from the landing page of the website. If clients use the phone to ask specific questions for which they want a resolution, agents should be able to access client files or previous call logs to maximize the likelihood the question can be addressed in one transaction.<sup>3</sup>
- Many clients do not separate their service channel experience from a specific Government of Canada program—that is, their experience with Service Canada is framed by the program they

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<sup>3</sup> It is understood that Service Canada may already consider service channels in the context of the transactions they are mostly likely to be used for.

applied to and/or which prompted them to contact Service Canada. This reinforces the continued need to explore service interactions from both program and channel specific perspectives. For clients of the EI program, the addition of a Frequently Asked Questions section on the website might help to improve their experience. However, for clients of the CPP-D program, it might not help in any significant way to add clarity regarding the program, something clients with a disability routinely identified as a reason for following up with Service Canada by telephone (i.e., needing assistance understanding the information they found on the website).

- Many of the same problems were identified both by clients with and without disabilities when it came to interacting with Service Canada, specifically with regards to navigating the website and finding information and wait times when contacting Service Canada specialized call centres. Where persons with disabilities identified additional problems or suggestions, or where their experience differed from those without disabilities, problems or proposed solutions have been clearly identified. Service Canada is encouraged to use this content to inform a Universal Design approach to service. In the context of the ESDC Accessibility Roadmap, design improvements informed by the feedback from persons with disabilities can be expected to improve service design for all clients of Service Canada.

## 5. Contract Value

The contract value was \$149,775.74 (including HST).

## 6. Political Neutrality Certification

I hereby certify, as a Senior Officer of Phoenix Strategic Perspectives, that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Policy on Communications and Federal Identity of the Government of Canada and Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do not contain any reference to electoral voting intentions, political party preferences, standings with the electorate, or ratings of the performance of a political party or its leader.



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Alethea Woods  
President, Phoenix SPI

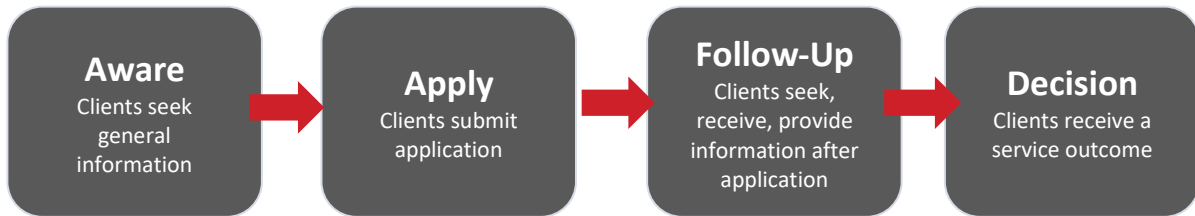
## Introduction

The Citizen Service Branch of Employment and Social Development Canada (ESDC) commissioned Phoenix Strategic Perspectives Inc. (Phoenix SPI) to conduct client experience qualitative research on service channel access with a specific focus on barriers related to accessibility.

### 1. Background and Objectives

Service delivery is fundamental to achieving ESDC’s mandate and contributes to the achievement of policy and program results. The Citizen Service Branch (CSB) gathers client experience data to support effective management of ESDC service delivery across the service channels and to improve access to programs and services in accordance with the Treasury Board of Canada Secretariat (TBS) Policy on Digital and Service.

In support of developing ESDC’s Accessibility Roadmap and better understanding service barriers, the Department required in-depth information on the experience of service channels from persons with disabilities and clients that experience barriers. The information requirement was for all service channels over the entire client journey, from awareness, where clients seek general information about a program, service or benefit, to the decision, where clients receive a service outcome, such as approval of a benefit or receipt of a service.



In addition to information on long-established service channels, such as online and telephone, CSB required in-depth information from clients on what is working well for them and what needs to be improved in relation to its newly adapted service channels. The adapted channels provide access to service, particularly to clients that experience barriers, and include:

Adapted Channel	Description	Channel(s)
<i>eServiceCanada</i>	A call-back service where a Service Canada representative calls you back within 2 business days after you complete a Service Request Form online.	Online => Phone
<i>eSIN</i>	A secure portal to submit an application and copies of supporting documentation for processing and issuance of a Social Insurance Number. A decision is then sent by mail.	Online
<i>eCommunity Outreach Liaison Service</i>	A toll-free telephone service for Indigenous communities and other vulnerable clients without access to the internet or who face other barriers such as literacy or language accessing ESDC’s programs and services.	Phone



The objectives of this research were to collect feedback to address the following questions:

- What aspects of service channel design and delivery are working well to provide access to service for all clients and, more specifically, for clients with various disabilities?
- What, if anything, needs to be changed in each service channel to remove barriers to access for all clients and, more specifically, for clients with various types of disability?
- Do the new and adapted service channels provide ease of access to different client groups, particularly clients that experience barriers given the restrictions to accessing Service Canada Centres during the pandemic?
- What service barriers exist in the service channel design and delivery, and what changes to design and delivery are needed to remove barriers to access?

At the Departmental level, the results will be used to improve adapted service channels and to identify opportunities for service improvements in the context of the ESDC Accessibility Roadmap. The CSB in Service Canada will use the results to improve the design and/or implementation of its service channels to ensure access to programs and services. The information collected will also inform the work of service managers of each relevant service channel within Service Canada.

## 2. Methodology

The research included 12 virtual sessions (mini focus groups, dyads, and one-on-one interviews) and 105 in-depth telephone interviews conducted between July 27 and December 13, 2021.<sup>4</sup> In total, 129 clients participated in this research study. Focus groups and dyads lasted 75 minutes and telephone interviews averaged 25 minutes. Participants included persons with a disability, seniors, youth, 'e-vulnerable' clients (i.e., those who rarely or never use online services and who are not very or not at all comfortable using online services), and 'newcomers' (i.e., immigrants who arrived in Canada in the last three years). All participants received an honorarium in appreciation of their time: focus group and dyad participants received \$75 and interview participants received \$50. More details about the methodology can be found in the [Appendix: Technical Specifications](#).

## 3. Notes to Reader

- *Limitations of the Research:* This research was qualitative not quantitative. Qualitative research is designed to reveal a rich range of opinions and interpretations rather than to measure what percentage of the target population holds a given opinion. As such, the results indicate clients' views about the issues explored, but they cannot be generalized to the full population of clients of Service Canada.
- *Presentation of Findings:* The report is organized as follows: 1) clients' experience with Service Canada (includes findings for clients with a disability and clients who used an adapted channel); 2) experience of persons with a disability; 3) experience of clients who used an adapted service channel; 4) program-specific service experiences (includes findings for both audiences); and 5) recommendations (based on findings for both audiences). In sections 1, 4, and 5, the findings and recommendations apply to both audiences unless otherwise specified. Findings or recommendations that pertain specifically to a subset of participants (i.e., persons with a

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<sup>4</sup> The fieldwork was suspended during the electoral period for the 44<sup>th</sup> general election, from August 15, when the election was called, to October 26, 2021, when caretaker period concluded.

disability, seniors, youth, 'e-vulnerable' clients, and immigrants who arrived in Canada in the last three years) are highlighted using bold format.

## Detailed Findings

### 1. Experience with Service Canada

This first section of the report provides information about participants' experience with Service Canada, including the reasons for contacting the agency, the type of information sought, the sources of awareness of benefits, and the service channels used at different stages of the client journey. Findings presented in this section incorporate feedback from both research audiences: persons with a disability<sup>5</sup> and clients who used an adapted service channel, which includes seniors, youth, 'e-vulnerable' clients (i.e., those who rarely or never use online services and who are not very or not at all comfortable using online services), and 'newcomers' (i.e., immigrants who arrived in Canada in the last three years). Audience-specific findings can be found in section 2: [Persons with a Disability](#) and section 3: [Adapted Service Channels](#).

Unless explicitly identified otherwise, findings in this section of the report apply to a majority of both audiences.

#### 1.1 Reason(s) for contacting Service Canada

By design, most persons with a disability and clients who had used an adapted service channel who participated in the research had contacted Service Canada in relation to a specific program.<sup>6</sup> The programs included:

- Canada Pension Plan (CPP).
- CPP-disability (CPP-D).
- Employment Insurance (EI), and/or EI-sickness and caregiver benefits.
- Old Age Security (OAS).
- Guaranteed Income Supplement (GIS).
- Social Insurance Number (SIN).

Most participants contacting Service Canada regarding a specific program did so on their own behalf, but a few said they did so on behalf of, or in relation to, a relative (i.e., a spouse, parent, or child).

Those contacting Service Canada in relation to a specific program typically did so for some combination of the following reasons:

- To obtain information about a benefit.
- To apply for a benefit, including completing and/or submitting the application.
- To apply for or renew a SIN.
- To follow up on an application.

Specifically, this included seeking a status update on an application, responding to updates about incomplete applications (e.g., requests for additional information or identification of missing

<sup>5</sup> Throughout section 1, findings pertaining to a sub-set of clients are highlighted using bold format.

<sup>6</sup> Clients were recruited from program and channel lists.

information), and inquiring about rejected applications (see details below: [1.2: Type of information sought](#)).

In addition to program-specific inquiries, some participants contacted Service Canada regarding the following:

- Updating or changing personal information (e.g., name, address, phone number).
- Signing up for or making changes to direct deposit.
- Resolving issues with their My Service Canada Account (MSCA) (e.g., difficulty logging, password not working, etc.).

## 1.2 Type of information sought

Persons with a disability and clients who used an adapted service channel contacted Service Canada seeking various types of information. Information sought, however, was most often about, or in relation to, program benefits and tended to fall into the following categories:

- Nature of the benefit: This included information such as what the benefit offers or covers, how long the benefit lasts, and how much the benefit offers.
- Eligibility requirements/qualifications: This included information, such as ...
  - who qualifies/is eligible for a program/benefit?
  - which benefit to apply for given one's condition/circumstances (e.g., CPP-D or EI sickness)?
  - how different programs/benefits relate to one another (e.g., CPP and EI, GIS and the Canada Emergency Response Benefit, CERB/Canada Recovery Benefit, CRB)?
  - how changes to marital status affect benefits (e.g., GIS)?
- Application process: This included information about the following:
  - Timelines regarding the process, such as when to apply or submit an application and how long it takes to process an application.
  - How to submit an application and/or accompanying documents (e.g., online, by mail, in-person).
  - Where to find forms and which forms to use.
  - How to apply for CPP-D for a dependent relative who cannot apply themselves.
  - Clarification/details regarding information required/requested.
- Reporting requirements: This included information about documentation accompanying applications and guidance regarding problems with third parties, in particular, employers, physicians or insurance companies (e.g., a missing or unsubmitted Record of Employment (ROE), missing or unsubmitted medical or insurance documents, etc.).

Other types of information sought by clients who contacted Service Canada using an adapted service channel included information about applying for or renewing a SIN, changing a name on a SIN card, fixing a problem with MSCA, and authorizing someone to access MSCA.

### 1.3 Source of awareness of the benefit (for those who applied for a benefit)

Several participants said they could not recall with certainty how they became aware of the benefit for which they applied or attributed their awareness to long-standing knowledge of its existence. Awareness of various benefits was also routinely assigned to family members and friends or acquaintances in general. A few clients who participated in the research attributed their awareness of benefits to advertising or news media, but they could not recall the specific source of this information. Feedback from clients with a disability and from those who used the adapted service channels was similar in this regard.

Other sources of awareness were specific to a benefit. Typical sources of awareness for CPP/OAS and EI included employers and human resources departments; accountants, tax preparers and/or CRA/tax-related documents; and Government of Canada or Service Canada correspondence (unspecified).

Among clients with a disability, sources of awareness of CPP-D specifically included the following:

- Physician.
- Insurance company.
- Workers' compensation.
- Wellness coordinator at a hospital.
- Disability support programs.
- Women's resource centre.
- Service Canada.

Regarding awareness of CPP-D through Service Canada, a few participants with a disability explained that they had been seeking general information about CPP on the Service Canada website or from a service agent on the phone<sup>7</sup> when they became aware of CPP-D. Specifically, they came across information about CPP-D during their website exploration or while discussing their circumstances with a Service Canada agent who informed them they might qualify for CPP-D.

In addition, a small number of participants applying for EI sickness or caregiver benefits said they also learned about these benefits through a Service Canada agent or because they were looking for general information about EI on the Service Canada website.

### 1.4 Service channels used and experiences by stages of the client journey

#### 1.4.1 'Aware': Seek general information

##### Sources of Information

The internet was the source most frequently used to obtain information about programs and benefits, including things like eligibility requirements if applicable and how to apply, by clients with a disability and clients who contacted Service Canada via the adapted service channels. Many

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<sup>7</sup> When discussing their experience contacting Service Canada by telephone, clients did not distinguish between the specialized call centres or the general 1-800 O-Canada phone line. Where the nature of the feedback provided by participants suggests which call centre they contacted (a specialized call centre or the general centre), this is noted in the report.

clients, however, identified the internet as their *first or initial* source of information, specifying that they followed up by calling Service Canada or arranging to be contacted by Service Canada (see details below).

Clients were directed to a Government of Canada website when using a search engine, typically Google, and inserting terms or phrases related to the program or benefit in question (e.g., 'EI', 'CPP', 'GIS', 'SIN'). As they explained, this led them to the Government of Canada website, alternatively identified as the 'Canada.ca' website, 'Service Canada' website, and in the case of some CPP clients, the 'CPP website'. **The internet as a source of information was also identified by some e-vulnerable participants, with the qualification that they received assistance from others in looking for this information.**<sup>8</sup>

Reasons offered by clients for using the internet to find information about a program or benefit included the following:

- Government websites are now a common or standard resource, so turning to the internet is a logical or reasonable first step when searching for information about government programs, services, and benefits. With this in mind, a few clients suggested that *if* they had started their search for information by calling Service Canada, the agent would probably refer them to the website for more/additional information.<sup>9</sup>
- The perception that information about programs on government websites is likely to be fulsome, comprehensive, and detailed.
- Websites provide a 'one-stop shopping service' where Canadians can find information about programs as well as access, complete, and (in some cases) submit benefit application forms.
- Information is available/accessible 24/7 so one can access it at one's convenience.
- Looking for information online, especially general information about programs, is likely to be faster/more efficient than calling Service Canada because of wait times to speak with an agent.
- Information on government websites is likely to be consistent, reliable, and up to date. By comparison, some participants felt that the information they receive from Service Canada agents depends on agents' level of knowledge about a program or benefit and this may vary from agent to agent.
- It is easier to retain, collect, and save information from a government website and this provides a sort of paper trail one can refer to. This included the ability to print information from a website. **A few clients with cognitive disabilities, including memory problems, were among those who identified this as the reason they looked for information online.**
- **Hearing impairments make it easier/more effective to get information online than by phone. Those with a visual impairment also mentioned that web-based information is**

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<sup>8</sup> Throughout section 1, findings pertaining specifically to a subset of participants are highlighted using bold format.

<sup>9</sup> This was not to suggest that the agent would not assist them. Rather, the suggestion was that, in addition to assisting them over the phone, the agent would direct them to the website.

**preferred because they can increase the text size in their web browser or use a screen reader to access the content.**

- The pandemic<sup>10</sup> has made online searches a more attractive, or even necessary, option given that in-person service is perceived to be limited or not available and phone service can take time.

Some clients said they used the telephone or called Service Canada to acquire information about programs and benefits. When discussing this channel, clients did not distinguish between the specialized call centres or the general 1-800 O-Canada phone line. The phone channel, moreover, was much more likely to be used as a follow-up or second step—for example, to *clarify* or *confirm* rather than *acquire* information (see details below: [Telephone/Call Centre](#)). Reasons given for using the phone to find information about a program or benefit included the following:

- The need for specific information, usually related to one’s own circumstances, as opposed to general program or benefit information. It was noted in this regard that contacting Service Canada by phone provides the opportunity to explain the situation, circumstances, or problem.
- Service interaction by phone allows for dialogue and the ability to ask questions and obtain answers.
- Service Canada staff can be proactive and volunteer information/details when speaking with clients.
- The ability to use the website and phone channels simultaneously. One can be on the phone and the website at the same time, which allows the Service Canada agent to help the caller access the required information on the website.
- Difficulty/apprehensions navigating websites (e-vulnerability).
- A general preference for human contact when interacting with government. An example of how this preference manifested itself in the search for information involved going to the Canada.ca website to find a phone number, and then calling the number rather than looking for information on the website.
- A Service Canada Centre (SCC) is not available in one’s community.
- **A client with a visual impairment opted to call Service Canada because they found it too difficult to read the information on the website, even when using the ‘zoom in’ feature in their browser to enlarge the font size.**

Some clients said they visited a SCC to obtain information about programs and benefits. Reasons given for using the in-person channel included the following:

- A preference for in-person service because it allows for human interaction, including the ability to explain a problem/issue with someone face-to-face.
- The proximity/convenience of a SCC.

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<sup>10</sup> The fieldwork for this study took place during the COVID-19 pandemic.

- Familiarity with Service Canada staff in a local office which allows for very personalized service (i.e., staff are aware of one’s situation).
- When English or French is not a client’s first language, it is easier to explain/express oneself in person or to have someone accompany them to help support them. **The same applied to a client with a visual impairment. It was easier to bring a family member to an in-person visit than to manage the interaction over the telephone.**
- Staff tend to be very helpful/proactive (e.g., providing information/materials, printing out forms, helping complete forms, etc.).

**Some CPP-D and e-vulnerable clients specified that they acquired information about the program or benefit via an intermediary, such as a friend or relative, an insurance broker, or a case manager.** A few of these participants described such information as an information ‘package’ or ‘packet’.

### Challenges encountered when seeking information using various channels

#### a. Internet/Canada.ca website

The most frequently identified challenges or problems identified by clients who used the internet to acquire information about a program or benefit were navigating/using the Service Canada website and/or seeking clarification/confirmation or additional details regarding program or benefit requirements/instructions/information. This applied to both clients with a disability and clients who used an adapted service channel. Examples included the following:

- Uncertainty about which program to apply for (e.g., EI-sickness or CPP-D).
- Difficulty finding forms.
- Uncertainty about which form to use.
- Uncertainty about the meaning of terms and expressions used in forms.
- Lack of understanding about reporting requirements—for example, what is included and exempted from income when applying for the GIS.
- Uncertainty about how to apply for a benefit (i.e., online or mail/paper).
- Lack of information relevant to one’s own specific condition/circumstances/situation.
- Lack of details about how to apply for CPP-D on behalf of someone else (e.g., spouse, child)
- **Those with a cognitive disability (more specifically those who mentioned they had anxiety) felt overwhelmed navigating the website.**

Other problems and challenges experienced by those seeking information online were mentioned infrequently and included problems using eServiceCanada (see sub-section: [3.2.1 eServiceCanada](#) below).

Those experiencing difficulties finding information online most often contacted a Service Canada call centre to address their issue/problem. Some specified that they followed up by phone because they felt they had no other option due to COVID-related protocols—specifically, they could not or should not go into an office.

While clients following up by phone were most often able to resolve their issue, they routinely observed that they had to wait a long time before being able to talk with a Service Canada agent.



Some described the wait time in and of itself as frustrating, while others said the wait time compounded their original frustration at not being able to find/understand what they were seeking online.

Other problems encountered by clients who followed up by telephone *after* visiting the website to look for information included the following, all of which were identified infrequently/by small numbers:

- Contacting a specialized call centre only to discover that it is closed and having to call back. This was described as even more frustrating because the client thought that the Service Canada website had stated call centres are open 24/7. Indeed, the client misinterpreted the information on the website, mistaking the EI automated telephone information service, which is available 24 hours a day, 7 days a week, for the specialized call centre.
- A call centre agent was unable to answer question(s) adequately—that is, only general information was provided to the client. While clients did not specify the telephone line used to contact Service Canada, it is likely that this issue would have been encountered by someone using the 1-800 O-Canada line.
- A call centre agent was unable to fully understand the problem/difficulty described by the client. This was mentioned by some clients who participated in the research; **a few of the clients identifying this challenge reported having a cognitive disability.**
- Having to be transferred to another agent or manager to deal with the issue.
- Encountering discrepancies between the information provided by the call centre agent and the information on the Canada.ca website.

While most clients who followed up an online search for information by contacting a Service Canada call centre, some turned to relatives, friends or acquaintances who have had experience applying for a program to help them. Those who did this typically said they found the information they needed. **These clients were primarily seniors, e-vulnerable, and persons with a cognitive disability.**

#### b. Telephone/call centre<sup>11</sup>

As noted above, the phone channel was much more likely to be used as a follow-up or second step to clarify or confirm rather than acquire information. The most frequently identified challenge or problem identified by clients who contacted a Service Canada call centre to acquire information about a program or benefit was the wait time to speak with an agent. Despite this, most indicated that they received what they needed when they eventually got through to an agent. Experiences did not differ by audience.

While rare, there were instances where clients who contacted Service Canada by phone to look for information about a program or benefit did not find what they were looking for. Reasons included the following:

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<sup>11</sup> Clients referred to the 'phone channel' without distinguishing between the program-specific call centres or the general information 1 800 O-Canada phone service.

- The call centre agent was unable to answer questions related to a client's specific circumstances.
- The call centre agent was unable to understand a client's situation because of its complexity. This was mentioned by several clients who participated in the research, including **a few clients who reported having a cognitive disability**.
- Frustration at being on hold for an extended period, resulting in a client terminating the call before being connected to an agent.
- Difficulty understanding a call centre agent because of their accent.

In such cases, clients either re-contacted the Service Canada call centre, consulted the Canada.ca website, or did both (i.e., re-contacted a call centre while online at the Canada.ca website). As a result of these steps, clients were able to get the information they needed, though some participants emphasized that it took time.

### c. In-person service at Service Canada office

Clients who visited a Service Canada office to find information about programs and benefits expressed satisfaction with the service they received, often describing staff as 'helpful', 'knowledgeable' and 'efficient'. Several participants mentioned issues accessing a Service Canada office due to COVID-19. This included **not having a chair to sit and wait for the appointment (mentioned by a client with a mobility-related disability)** and being turned away by security staff monitoring access to the office. Those who mentioned not being able to access the Service Canada office explained that the materials they needed were available for pick-up (so their interaction/transaction was successful) or that they needed only to submit a completed form (which they were able to do despite restricted access to the office).

## 1.4.2 'Apply': Complete and submit an application

### Channel(s) used to apply for programs/benefits

Each of the possible ways of applying for various benefits/programs (i.e., online, by mail, in person at a Service Canada office) was used by at least some clients who participated in this study. More specifically:

- All those who applied for EI benefits said they submitted their application online.
- Most CPP-D applicants said they submitted their application by mail, with some saying they submitted it online or in-person at a Service Canada office.
- All but one of the SIN applicants said they submitted their application online<sup>12</sup> (one did so in-person at a Service Canada office).
- Most applicants for the GIS or OAS said they did so by mail, although a few said they did so either online or in-person at a SCC.

Clients who contacted Service Canada to complete other types of transactions, such as changing their name, changing their address, setting up direct deposit of funds or making changes regarding the latter, said they did so online. One participant mentioned having to follow up by phone because it was unclear whether the name change had been successful.

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<sup>12</sup> This was by design—clients were recruited from the eSIN channel.

### Reasons for applying using various service channels

Below are reasons provided by clients to explain why they applied using the service channel they did. Reasons have been classified according to the channel used to submit an application. To be clear, the focus here is on the channel used to *submit* an application.

#### a. Online submission

Reasons provided for online submission of applications included the following:

- **Speed/convenience:** This included the ability to complete and submit forms online (e.g., no need to download, fill out, mail forms), and speed up the submission process (i.e., no need to send forms by mail). Several EI clients described the online submission process using expressions such as ‘easy’, ‘quick’, ‘fast’, ‘straightforward’ and ‘convenient’.
- **Apprehensions about mailing applications:** This had to do with fears/apprehensions that applications might get delayed or even lost if sent by mail.
- **Disability/mobility issues:** **A few participants with a disability explained that online submission was the best option for them given their condition. By way of explanation, one of these participants noted that they have Parkinson’s disease which, in addition to causing mobility problems, makes it exceedingly difficult for them to write legibly. As a result, the ability to complete and submit forms online made the application process a lot easier.**

#### b. Submission by mail

Reasons provided for submission of applications by mail included the following:

- **Concerns about electronic submissions.** This included both concerns about the security and confidentiality of sending applications online, as well as concerns about possible technical problems with the submission process.
- **E-vulnerability (i.e., discomfort/feeling of limited competence) interacting online.**
- **Requirement to send original/official documentation (i.e., hard copy format).** For example, someone applying for CPP-D on behalf of their child observed that there was a requirement that official hard copy documents from the child’s educational institutions be submitted as part of the application package.
- **Perception that this was the only option/the most viable option.** This included some CPP-D applicants and a few seniors. Among the CPP-D applicants in question, some were under the impression that applications could only be submitted by mail (i.e., online submission was not possible and in-person submission was suspended due to the pandemic). A few others were confused about the online submission process, thinking that this might involve filling out the form online then printing it, signing it, scanning it, and uploading it. As a result, they felt it would be easier to submit the application by mail. The seniors in question felt that mail was the most viable option for them due to the following: health concerns related to entering a SCC, no conveniently located Service Canada office, and lack of familiarity submitting documents online.

#### c. In-person submission

Reasons provided for in-person submission of applications included the following:

- Comfort/peace of mind regarding submission—that is, certainty that the application has been received when it is handed directly to a Service Canada staff member.
- Convenience. This included the fact that there is a SCC conveniently located and the ability to get a hard copy of the application form, fill it out, and submit it, as part of the same in-person service interaction.
- Opportunity to ask questions that might come to mind at the last-minute regarding submission of an application.
- **To get help/assistance completing the form/application (one of the clients who mentioned this challenge reported having a cognitive disability).**

#### Reasons for contacting Service Canada during application process

While completing and submitting their application, many participants said they contacted Service Canada. Most of those who did, did so by contacting a call centre, while some used the eServiceCanada service to arrange a call back, and a few went into a SCC. They did so for various reasons which included the following:

- Clarify/confirm their understanding of what was being asked in terms of required information and eligibility requirements prior to applying.
- Clarify/confirm how clients are expected to submit the application.
- Clarify/confirm application requirements (e.g., accompanying documentation).
- Assistance getting/downloading an application form (e.g., getting a printed copy of an application form at a SCC).
- Assistance completing an application form.
- Seek information/details regarding documentation requirements from third parties (e.g., ROEs from employers, documents from physicians or insurance companies).
- Seek information about timelines (e.g., when to apply, how long it takes to process an application).
- Clarify/confirm where to mail an application form.
- Difficulties/challenges completing the application form (see details below: [Challenges barriers encountered during application process](#)).

**It should be noted that some clients, primarily CPP-D applicants, but also EI sickness, CPP and SIN applicants, used sources other than (or in addition to) Service Canada to assist them with some of these kinds of issues.** Such sources included family members, friends, accountants, insurance brokers, support workers, and other Service Canada clients with experience submitting the same service request.

#### Challenges/barriers encountered during application process

As noted above, many clients said they contacted Service Canada during the application phase of their service interaction (i.e., while completing and submitting their service request). In addition to seeking clarification/confirmation or additional information, many contacted Service Canada because of challenges experienced during the application process. As these challenges tended to relate to specific programs/benefits, they will be dealt with in the section titled: [4. Program specific insights](#). **It is worth noting, however, that challenges were most likely to relate to CPP-D applicants.**

### 1.4.3 'Follow up': Seek, receive, provide information after applying

Most participants said they followed up about their application in one way or another. Among those who did *not* follow up, the main reason volunteered was an absence of need or the desire to do so. Some CPP-D applicants explained that the main thing for them was to confirm receipt of their application (which Service Canada did by phone), not track its status following receipt. In other words, they submitted their application and waited to be contacted by Service Canada. Most SIN applicants said they did not follow up on their application, with some specifying that they simply checked their mail for receipt of their card.

#### Reasons for following up on applications

Clients who did follow up about their applications did so for various reasons, including the following:

- Track the status of an application (primarily CPP-D applicants).
- Confirm receipt of an application.
- Discuss issues related to missing/incorrect/incomplete information in application (after being contacted about this by Service Canada).
- Receiving no response from Service Canada within the specified timelines.
- Get details about a declined application (after being informed about this by Service Canada).
- Discuss/get information related to the process for reviewing a decision.
- Complications/issues related to administration of benefits/payments (typically delayed payments).
- Requested changes not registered (e.g., change of name, address, account for direct deposit).

#### Channels used to follow up on applications

The service channels typically used by clients, including persons with a disability, to follow up about an application were the phone and clients' MSCA. The most frequently given reasons for using both channels were that the follow-up information sought related to the client's specific situation or circumstances, and that these were the most appropriate and convenient channels for following up on issues of this nature. The main difference between the use of these two channels was that MSCA was used primarily by clients who followed up on their application to get an *update* on the status of their application. By contrast, follow up by phone was primarily used by clients who followed up because of an issue related to their application, or to inquire about a decision on their application. Some CPP-D applicants, however, said they followed up by phone to see if they could get more detailed information about their application (i.e., beyond being informed that it was 'in-progress').

Follow up by phone occurred most often by contacting a call centre, but a few research participants also followed up using eServiceCanada. Beyond using the Canada.ca website to arrange a callback, following up by using the website was limited. This included looking for general/non-personal information (e.g., how to request a review of a decision), looking for the number for a call centre, and having access to information on the website while discussing an issue with a call centre agent.

### Challenges/barriers encountered

Overall, most clients who followed up said they were satisfied with the service they received from Service Canada. Challenges or barriers that were encountered included the following:

- Understanding a decision/why an application was turned down.
- Inability to track status of SIN application.
- Inability to resolve an issue or complete a transaction in one service interaction.
- Having to re-explain a lingering problem/issue or experiencing a problem that requires several interactions with Service Canada staff to resolve. Examples included delayed payments/problems related to payments not resolved in one service interaction, delays/problems registering changes (e.g., changed name, address, deposit details) not resolved in one service interaction.
- Being told to call back if the problem is not resolved.
- Being transferred from agent to agent.
- Being put on hold while information is being checked.

Perceived challenges or barriers about which clients contacted Service Canada, but for which they did not hold Service Canada or its agents responsible, included issues related to incomplete submissions because of third parties not providing the required information, and rejected applications.

## 2. Persons with Disabilities

This section of the report describes the experiences of persons with disabilities.

### 2.1 Profile of Participating Clients

Clients with disabilities were recruited from the CPP, EI and SIN administrative databases, as well as selected channel lists. In total, 72 clients with a disability participated in the research, of which 48 were CPP-D clients. CPP-D participants included clients with the following types of disabilities: a physical disability, which may include mobility, flexibility, dexterity, and prolonged pain issues (n=27 clients), a cognitive disability, which may include learning, developmental, memory or mental health-related disabilities (n=19), a seeing disability (n=8), and a hearing disability (n=2). The age of CPP-D clients who participated in the research ranged from aged 26 to 64, with the median age of participants being 53 years.<sup>13</sup>

In addition to the CPP-D participants, ten clients who had applied for EI Sickness benefits due to sickness, injury, pain, or quarantine participated, as well as six clients who used one of the adapted channels and who identified as having a disability. Clients who were not recruited from the CPP-D and EI Sickness benefits programs were asked if they identify as a person with a disability; that is, a person with an impairment or functional limitation that is permanent, temporary, or episodic in nature, evident or not, and prevents full and equal participation in society due to physical, architectural, technological, or attitudinal challenges. The specific nature of the disability was not requested.

### 2.2 Overall experience with Service Canada

Most clients with a disability expressed satisfaction or said they got what they needed when describing their overall experience interacting with Service Canada. Moreover, many either described the experience as positive or said they were completely satisfied with the service received. Commonly identified issues or problems related to interactions with Service Canada included the following:

- Navigating the Service Canada website/finding information.
- Wait times when contacting Service Canada call centres.
- Lack of clarity in various requirements/instructions/information.
- Inability to resolve an issue or complete a transaction in one service interaction.

Other difficulties, barriers, or challenges were linked to a specific program and are dealt with below in the section: [4. Program-specific insights](#).

### 2.3 Service channel preferences

Clients with a disability provided various reasons for preferring one service channel over another service channel. Reasons by channel were as follows:

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<sup>13</sup> Most CPP-D client who participated in the research were under the age of 60 (8 of the 48 CPP-D clients were seniors aged 60 and older).

- Website
  - It is comprehensive.
  - It offers a first point of access.
  - It is faster than using the phone.
  - It is available 24/7.
  - Clients can access and complete forms online.
  - Clients do not need to complete forms by hand.
  - The information on the website is reliable and consistent.
  - Information on the website can be referenced (i.e., provides a 'paper trail').
- In-person
  - Help/assistance is available immediately.
  - There is an opportunity to ask questions and receive answers.
  - Staff are seen as being proactive (i.e., 'going the extra mile').
  - It is easier to explain a problem face to face rather than over the phone; this was particularly important for Allophones.
  - Proximity to an office.
- Phone
  - There is an opportunity to ask questions and receive answers.
  - Staff are seen as being proactive (i.e., 'going the extra mile').
  - It is easier to explain a problem / good for complex issues.
  - Clients can receive help over the phone while looking for/completing forms on the website.

Some clients said they have no service channel preference, observing that their preference depends on the nature of their service interaction.

## 2.4 Views of Service Canada's staff

Most clients with a disability who dealt with Service Canada staff described the latter as properly trained and equipped to meet their specific needs. Reasons included their understanding, patience, proactivity, sensitivity, and help finding/completing forms. Some clients with a cognitive disability described experiences with agents that were at times 'frustrating' but in only a few instances did a client describe staff as not properly trained or equipped to meet their specific needs.

Those who felt this way usually suggested that staff in general were not sufficiently acquainted with the intricacies of the client's situation/circumstances to fully meet their needs, even though they tried. Related to this, a few explained that staff were not equipped to meet their needs because the main problem was not service-related but policy-related (e.g., eligibility requirements, payment amounts, required documentation). In only one instance was staff described as not properly trained or equipped as a result of a lack of courtesy or professionalism. Moreover, in that case the shortcoming was associated with a specific individual, not staff in general (i.e., it was described as a 'one-off').

Experiences that stand out as particularly helpful in meeting the specific needs of clients with a disability included the following, most of which have been identified above: assistance finding and completing forms; volunteering helpful information; providing service with compassion, sensitivity and understanding; and having patience when interacting with clients.



## 2.5 Suggestions for Service Improvement

Suggestions from clients with disabilities to improve the quality of service they received from Service Canada did not differ from other clients who took part in the research. That is, clients with a disability identified many of the same problems or challenges identified by other clients when it came to interacting with Service Canada. This included navigating the website and finding information as well as wait times when contacting Service Canada specialized call centres. Their suggestions to address these challenges, moreover, tended to not reflect their specific disability—for example, suggestions from clients with a hearing impairment did not focus specifically on their hearing impairment. With that said, grouped below are suggestions for impairment-specific service improvements offered by clients with a disability:

- For clients that are benefit recipients, and who receive mail or correspondence from Service Canada, a client with a **visual disability** suggested that a note be added to people's files to indicate a need for large font, or it was suggested that information always be sent electronically so that the recipient can increase the font size when viewing the correspondence on their device.
- For clients with a **mobility impairment**, it was suggested that SCC have adequate seating areas for clients who cannot stand while waiting to be seen by a service representative. It was also suggested that Service Canada have more offices in local communities for clients with disabilities, and in particular, those with mobility impairments.
- Continue to offer appointments for in-person service. For those with certain types of **mobility and /or cognitive disabilities**, using the walk-in service can be stressful. With an appointment set, clients can be assured that they will not have to wait too long to see a service representative.
- For clients with **cognitive disabilities**, it was suggested that Service Canada put more resources online so they can take as much time as needed to review program- or benefit-specific information. In addition, it was suggested that this information, especially program eligibility information, be presented in simple language that is clear and easy to understand for everyone, including those clients with memory issues or impaired information processing.

### 3. Adapted Service Channels

This section of the report describes the experiences of clients who used one or more of Service Canada's adapted service channels.

#### 3.1 Profile of participating clients

Clients were recruited from selected channel lists. In total, 57 clients who used an adapted service channel participated in the research. Participants included youth (n=8 clients), seniors (n=28), Indigenous clients and clients that experience barriers accessing ESDC's programs and services who use the eCommunity Outreach Liaison Service (eCOLS) (n=7), clients who are 'e-vulnerable' (i.e., those who rarely or never use online services and who are not very or not at all comfortable using online services) (n=8), and 'newcomers' (i.e., immigrants who arrived in Canada in the last three years) (n=6).

#### 3.2 Overall experience with Service Canada

Overall, client feedback on the adapted service channels was positive, with users routinely expressing satisfaction with them. Service Canada clients who used these channels typically described them as clear, easy to use, convenient, and useful or helpful in relation to their transactions with Service Canada.

Positive feedback in relation to eSIN<sup>14</sup>, in particular, included the following: the ability to apply for a SIN online (as opposed to doing so in-person or by mail); the user-friendly interface; the relevance of the information required to complete the application (the application did not appear to request information clients deemed non-essential); the amount of information required to complete the application, which was viewed as not overly burdensome; and the format of the online form, which some note was consistent with other Government of Canada online forms, such as those used by the Canada Revenue Agency. Clients routinely mentioned that they would recommend eSIN to someone they knew who needed help with applying for a benefit or SIN.

Critical feedback from clients who used these service channels was limited and is presented below by channel.

##### 3.2.1 eServiceCanada

eServiceCanada allows clients to request help online, through the website, and then are contacted by telephone by a Citizen Service Officer.

Clients who used eServiceCanada and experienced difficulties pointed to the following issues with the service:

- The service is not very useful for clients who need help immediately, i.e., those who cannot wait two business days. It was noted in this regard that, if one must wait two business days for a callback, one might as well contact a Service Canada call centre and wait on hold to speak with a Service Canada agent.

<sup>14</sup> It should be noted that participants who had used eSIN were all under the age of 35 years.

- Related to the first bullet, the timeframe for being contacted (i.e., two business days) is too indefinite, resulting in clients missing their callback and having to reschedule one. A window to expect the call would be preferred (i.e., between 8 am and noon on X day, or between 1 pm and 4 pm on either day).
- Two callback attempts on the part of the service agent is too limited. Related to the second bullet, without a more precise callback day and time, clients may miss the call from Service Canada and need to go back online to schedule another callback.
- The agent’s speech was heavily accented and difficult to understand.

### 3.2.2 eSIN

A secure portal for clients to submit an application and copies of supporting documentation for processing and issuance of a SIN.

Critical feedback related specifically to eSIN was limited and included the following (identified by individual participants):

- Technical problems or glitches trying to submit the form (i.e., ‘error’ messages) once completed online.
- Difficulty understanding which application type to choose (i.e., the first required information—first SIN, update or correction to SIN record, confirmation of SIN, legal change of name, etc.).
- The layout of the online application form, specifically its two-column format (see image below). It was suggested that the two-column layout of the online form resulted in the omission of required information (i.e., those completing the form, depending on the type of device they are using, might not notice the information requested on the right side of the form).

The image shows a screenshot of the eSIN application form, divided into two columns. The left column is titled 'Applicant's Information' and contains the following fields: 'First Given Name (required)', 'Other Given Name(s)', 'Family Name (required)', 'Date of Birth (required)' (with separate dropdowns for Year, Month, and Day), 'Day Time Telephone Number (required)', 'Evening Telephone Number', and 'Language of Correspondence (required)'. The right column is titled 'Applicant's Family Name' and contains 'Family Name at Birth (required)' and 'Other Family Name(s) Previously Used'. Below this, there are two sections for 'Applicant's Parent', each with 'Given Name(s) (required)' and 'Family Name at Birth (required)' fields. The form uses a two-column layout, which, as noted in the text, can lead to information being missed on the right side of the form.

- Lack of clarity regarding primary, secondary, and supporting documents.

- Inability to confirm a submission or track the status of a SIN application, which was described as important for international students who need to prove/confirm that they have a SIN or have applied for one.

### 3.2.3 eCOLS

A toll-free telephone service for Indigenous communities and other vulnerable clients without access to the internet or who face other barriers such as literacy or language and clients that experience barriers accessing ESDC's programs and services.

Experience with the eCOLS telephone access service was positive overall. A few clients who participated in the research described the phone service as 'problematic' at times, explaining that they had to call the outreach number multiple times before reaching an agent. This was because their call would disconnect from the system or because communicating with a service representative was impeded by lag time (delays between when they would speak and when they would be heard by the representative) or by difficulty hearing the service representative or being heard by the service representative.

## 4. Program-specific Insights

During the research, it became apparent that many clients were unable to separate their service channel experience from a specific Government of Canada program. What follows in this section of the report is a discussion of clients' experience with Service Canada as it pertained specifically to, or was framed by, the program that they applied to and/or which prompted them to contact Service Canada.

### 4.1 CPP-D

Difficulties related to the CPP disability (CPP-D) program were usually encountered during the information gathering and the application stage of the client journey.

#### 4.1.1 'Aware': Seek general information

Regarding information gathering, clients with a disability routinely observed that there is a vast amount of information to review, understand, collect, and keep track of related to eligibility and application requirements. Clients typically searched for, and found, this information on the Service Canada website, though some e-vulnerable clients specified that they did so with the assistance of, or by relying on, others. These clients found support in family members, friends, or support workers, for example.

Many clients who sought information on Service Canada's website also contacted Service Canada at some point during this stage of their journey. The main reasons for contacting Service Canada after visiting the website were to obtain help finding CPP-D related information (information they could not locate on the website) or assistance understanding CPP-D related information that they found on the website. Follow up with Service Canada was most often done by contacting the Service Canada call centre, though some said they used the eServiceCanada channel to arrange a callback from a representative. Some CPP-D applicants, typically those with a cognitive disability, described the information gathering stage of the process as 'overwhelming' or 'daunting'.

#### 4.1.2 'Apply': Complete and submit an application

When it came to applying for CPP-D, the most frequently identified challenges related to the length of the application form, as well as the amount, and type, of information required to complete the form. Many clients who participated in the research said they experienced frustration, anxiety, or confusion while filling out the form. They attributed these feelings to not understanding what they were being asked to provide, uncertainty that they had provided the correct or sufficient information, or to not having the type of information they were asked to provide (e.g., future treatments and tests for their medical condition).

In some instances, this resulted in clients fearing that their application would be rejected because of insufficient or incorrect information. A few clients described their experience filling out the form as 'disheartening', or said they felt 'defeated' by it, adding that at times they wanted to give up at the application stage. Other problems or challenges identified at the application stage included uncertainty or confusion about where to mail the application to (i.e., which address/location) and about what needs to be included in the package.

Although not ascribed to Service Canada, a barrier or challenge experienced by some clients during the application process concerned third-party information providers, such as physicians and insurance companies. Such problems included concern over whether documentation had been submitted by these third parties; difficulties contacting third parties, for example, a physician on leave or holiday; and problems related to physicians who have retired or turned over their practice to another physician.

Another challenge identified by a few research participants involved difficulties accessing a printer to print application forms and documentation. Again, this was not a challenge attributed to Service Canada specifically, but access to necessary equipment, in this case a printer, is a barrier that is encountered by some clients.

#### **4.1.3 'Follow up': Seek, receive, provide information after applying**

Few CPP-D clients identified challenges when following up on their application. Some expressed disappointment at having their application denied, but issues at this stage of the client journey were much more likely to be policy-related than service-related. Policy-related issues focused on participants' perceptions of the eligibility criteria for CCP-D, and specifically, the different reasons for applications being declined. With that said, CPP-D applicants were most likely to identify or emphasize two issues associated with Service Canada delivery channels: difficulty navigating/using the Service Canada website and wait times when contacting Service Canada call centres.

Some clients with a visual impairment said they experienced a challenge or difficulty completing the form because the font is too small (both online and in print format) or because of the strain on their eyes from staring at a screen (in the case of reading information or completing the form online). Enlarging the font/using the zoom function was described by one client as only helping 'a little'. Another client with a visual impairment printed out the form to complete it, in the hope that it would be easier to read using a magnifying glass (the result was described as marginally better). Some of these clients emphasized that they relied on family members to help them complete the form.

It is worth noting, moreover, that the types of challenges encountered at this stage were sometimes exacerbated or compounded by clients' conditions. For example, some clients with a cognitive disability described their condition as making it more difficult to understand or process information. Some said that this was particularly the case when contacting Service Canada by phone at a call centre or being contacted by phone through the eServiceCanada channel. The fact that information was provided orally could make it difficult for someone with a cognitive disability to answer questions, remember details, or transcribe information correctly.

## **4.2 EI Sickness Benefits**

Clients gathering information in relation to, and applying for, EI sickness encountered fewer service-related problems than those doing the same for CPP-D. Most EI clients who participated in the research said they used the online service channel to gather information and complete the application form without having to contact Service Canada or other sources, such as a friend or family member, for assistance. Problems or challenges encountered when applying for EI were more likely to be technical or personal in nature—for example, forgetting the password to their My Service Canada Account. The following types of challenges were identified by research participants:

- Understanding the online application and what kind of information to include to be eligible for EI-sickness benefits.
- Difficulty finding information/forms online—for example, the *Medical Certificate for Employment Insurance Sickness Benefits*.
- **Difficulty seeing/reading online due to the strain on one's eyes of looking at a screen for a lengthy period of time (visually-impaired person who received assistance from a family member). The application takes approximately one hour to complete.**
- Difficulty determining which file format to use when sending documents to Service Canada (i.e., MS Word or PDF).
- Lack of clarity/conflicting information from Service Canada call centre agents about whether to apply for EI-sickness benefits or CPP-D benefits.
- **Difficulty explaining one's problem/situation to a call centre agent, in some instances as a result of a cognitive disability compounded by a mental health condition.**

Some clients who experienced challenges related to CPP-D and EI identified one common frustration: the frustration of having to re-explain a lingering problem/issue or experiencing a problem that requires a number of interactions with Service Canada staff to resolve the challenge they experienced.

### 4.3 SIN

Very few clients who participated in the research experienced difficulty with a SIN application. Almost everyone used the online channel to gather information and complete the application form and few experienced any difficulty completing the latter. Indeed, almost everyone mentioned they did not have any difficulties filling out the form and submitting it. Those who encountered difficulties identified the following:

- Insufficient/lack of information about requirements for applying for/updating one's SIN.
- Misunderstanding information requested resulting in submission of incorrect/erroneous information, which required correction.
- Misunderstanding information requested resulting in submission of insufficient information, which required follow-ups with Service Canada.

Challenges associated specifically with the eSIN were identified earlier ([3.2.2 eSIN](#)).

### 4.4 Other interactions with Service Canada

Service Canada clients involved in other kinds of interactions with the department typically described their interactions as problem-free. This included transactions that involved changing one's name as a result of a change in marital status, changing one's address, setting up direct deposit of funds or making changes to the latter, and applying for OAS/GIS. To the extent that there were problems, they took the form of requested changes not registering—for example, a change of name, address, or account for direct deposit. While these problems were eventually resolved, in some instances resolving them required more than one service interaction with Service Canada.

## 5. Recommendations/Future Directions

Clients identified a variety of things Service Canada could do to address some of the challenges they faced and/or to make access to its programs more user-friendly. While a number of suggestions were made, it is important to note that there was one aspect of service with which clients were very satisfied and offered no suggested improvements: the degree of professionalism, attitude, courtesy, and respectfulness of Service Canada personnel.

The suggestions that follow are organized by the service channel and program to which they relate.

### 5.1 Telephone

Suggestions to improve the service provided by the specialized program call centres included the following:

- Implementing measures to reduce wait times when contacting the program call centres (there is no wait time for calling the 1-800 O-Canada service). Suggested measures included having more phone agents answering calls during peak hours, extending hours, and keeping call centres open on weekends.
- Offering the option to schedule a callback rather than wait on hold for the next available agent. Some noted that this is something that is offered to clients when calling the Canada Revenue Agency.
- Having better trained phone agents, who are more knowledgeable about program details and requirements. Recall that clients mentioned having received conflicting information from Service Canada call centre agents about whether to apply for EI-sickness benefits or CPP-D benefits.
- Ensuring that phone agents consistently provide the same information.
- Delegating more responsibility/authority to front-line staff—specifically, allowing more transactions to be completed by telephone and if this requires an agent to look at a client's file, agents should have the authority to do this.
- Facilitating phone transfers to staff in authority positions/management if a phone agent cannot answer question(s)/resolve issue(s).
- Providing special numbers/dedicated call-centres for special cases/emergencies.
- Making the phone/call centre menu easier to navigate/more user-friendly.
- Ensuring French-speaking agents are fluent and (as much as possible) easy to understand for clients. It was emphasised that the ability to understand an agent is particularly crucial when they are asking client's questions.
- Having more resources in place for clients whose first language is neither English nor French.
- Saving/storing client information as part of call records so that clients do not need to repeat information already provided, and agents do not need to put clients on hold to go check information.



## 5.2 Service Canada website

Suggestions to improve the Service Canada website focused on making the site more user-friendly and easier to navigate. Specific suggestions in this regard included:

- Adding Frequently Asked Questions (FAQs) sections for various programs/benefits.
- Making it easier to locate application instructions—for example, keep these instructions in a dedicated area of the website (i.e., one-stop shopping).
- Improving the search function so clients can more easily and quickly find what they are looking for.
- Providing direct links to various forms, in particular, commonly requested forms.
- Including a “forgot my password” link very prominently on My Service Canada Account and making the recovering process as quick and easy as possible.
- Making the process to upload documents to Service Canada easier and more user-friendly.
- Offering more resources for clients whose first language is neither English nor French (e.g., Arabic, Punjabi, Indigenous languages).

In addition to these suggestions to improve Service Canada’s online channel, some research participants suggested the inclusion of a real-time chat service that could be accessed through the website.

**While not a suggested improvement to the website, it was noted by some participants that Service Canada should not shift all transactions online because of potential problems that can occur with online transactions and out of consideration for clients not comfortable conducting interactions/transactions online (e.g., e-vulnerable clients).**

## 5.3 eServiceCanada

Suggestions to improve eServiceCanada included the following:

- Offering the ability to specify or narrow the timeframe for a callback appointment and/or to suggest times for the appointment.
- Having Service Canada representatives try calling back more than twice and leaving a message providing a callback number and a timeframe within which the client can call back (instead of having them reschedule the call).
- Providing an ‘other specify’ option in the ‘How can we help you?’ section for clients to use to fully describe the nature of the issue.
- Allowing CPP-D clients who do not have a terminal illness to use the service.

## 5.4 eSIN

Only a few suggestions were made to improve eSIN. These included:

- Reformatting the application form so that questions follow one another instead of being placed beside each other.

- Sending confirmation that one's SIN will be sent to an address and giving an option to change that mailing address. International students tend to move frequently so they need to be able to track their mail.
- Allowing the status of one's application to be tracked. At present the only confirmation is when the SIN arrives in the mail.

## 5.5 CPP-D application process

Suggestions to improve the service experience focused on the application process and included the following:

- Providing easy access to information related to eligibility and application requirements.
- Providing a FAQ (Frequently Asked Questions) section on the website regarding CPP-D.
- Making the online application for CPP-D shorter/less complicated.
- Providing assistance completing the application—for example, a step-by-step checklist for applicants to follow. This was most likely to be identified by clients with a cognitive disability.
- Using more common-sense/plain language in forms.
- Allowing applications, including all supporting documentation, to be submitted electronically.
- Providing more space on the application form, so as not to have to append attachments in order to provide all the requested information.
- Providing clarification of terms, such as 'common-law relationship'.
- Allowing greater information sharing between departments of the federal government to limit the burden placed on applicants when it comes to completing the application. For example, Service Canada should be able to access information that is held by the Canada Revenue Agency for the purpose of assessing the application.
- Providing a special, dedicated number for people to call to discuss an application that has been denied.

One general suggestion regarding the CPP-D application process was to keep in mind that people applying for this benefit are dealing with serious health-related issues that are impacting every facet of their lives. They are being asked to devote a tremendous amount of time and effort to the application process at a time when they are already dealing with other significant challenges. While it is important that all the application information is complete and accurate, every effort should be made to streamline the application process to make it as stress-free and simple as possible.

## Appendix

### 1. Technical Specifications

The research included online focus groups and in-depth, one-on-one interviews. Specifically: 12 virtual sessions (mini focus groups, dyads, and one-on-one interviews) and 105 in-depth telephone interviews conducted between July 27 and December 13, 2021.<sup>15</sup> Research participants were recruited by telephone from two batches of lists provided by Service Canada. The first batch was provided in June 2021, for the first phase of the fieldwork, and the second batch was provided in November 2021, for the final phase of the fieldwork.<sup>16</sup>

In total, approximately 44,000 client records were provided from a total of six lists. The lists were as follows:

1. Clients who applied for EI sickness (drawn from the EI administrative databases).<sup>17</sup>
2. Clients who applied for CCP-D (drawn from the CPP administrative database).<sup>15</sup>
3. Clients who applied for a SIN using eSIN (drawn from the SIN administrative database).
4. Clients who used the eCOLS service channel (drawn from lists compiled by COLS councillors).
5. Clients who used the eServiceCanada request/eSC reservation tool (drawn from channel lists).
6. Clients who accessed a SCC to apply for EI, CPP, CPP-D, OAS/GIS or SIN (drawn from various program administrative database).

Clients were contacted by telephone and administered a recruitment screener to confirm their eligibility for the research. Those eligible, who agreed to participate, were included in a virtual session or one-on-one interview. A small number of clients with a disability who contacted Service Canada via eServiceCanada, and who provided an email address for contact purposes, were sent an email requesting their participation in the research study.

In all, 244 clients initially agreed to participate in the research when contacted as part of the recruitment process.<sup>18</sup> In the end, 129 clients (or 43% of those recruited) participated in this research study. The breakdown of clients is as follows:

<b>A. Persons with a Disability</b>	<b>72</b>
<i>Physical Disability</i>	27
<i>Cognitive</i>	19
<i>Other Disability</i>	10
<i>Seeing</i>	8
<i>Disability (adapted channels: type of disability not specified)</i>	6
<i>Hearing</i>	2

<sup>15</sup> The fieldwork was suspended during the electoral period for the 44<sup>th</sup> general election, from August 15, when the election was called, to October 26, 2021, when caretaker period concluded.

<sup>16</sup> The fieldwork was conducted in two phases: pre-election and post-election. Therefore, the lists were updated in advance of the second phase of the fieldwork to ensure that clients' experiences with Service Canada were not too long ago so as to compromise recall.

<sup>17</sup> Persons with a disability who applied for CPP-D or EI sickness did so in the 12 months preceding the research.

<sup>18</sup> 77,000 calls were made to recruit 244 clients, of which 129 participated in the research study.

<b>B. Youth</b>	<b>8</b>
<b>C. Seniors</b>	<b>28</b>
<b>D. eCOLS</b>	<b>7</b>
<b>E. eVulnerable</b>	<b>8</b>
<b>F. Newcomers</b>	<b>6</b>
<b>Total</b>	<b>129</b>

The following design specifications applied to the **focus groups**:

- Participants were paid an honorarium of \$75.
- iTracks’ video/web online platform was used to host the groups.
- All sessions were video recorded. Participants were informed of this during the recruitment and reminded of the recording by the moderator in advance of the discussion.
- Each group lasted 75 minutes.

The following design specifications applied to the **interviews**:

- Participants were paid an honorarium of \$50.
- All interviews were conducted by telephone.
- Interviews averaged 35 minutes and were conducted in the individuals’ official language of choice.

All steps of the project complied with *The Standards for the Conduct of Government of Canada Public Opinion Research*.

## 2. Recruitment Screener

### A. Introduction

1. Hello/Bonjour, may I please speak with [INSERT NAME FROM SAMPLE].
  - IF AVAILABLE, CONTINUE.
  - IF UNAVAILABLE, ARRANGE A CALLBACK.
  - IF NOT AT THIS NUMBER ANY LONGER, ASK FOR A NEW NUMBER FOR THE PERSON.

→ IF ASKED BY THE PERSON WHO ANSWERED THE CALL (NOT THE CLIENT), EXPLAIN THE PURPOSE OF PHONE CALL. "I'm calling on behalf of the Government of Canada to ask some questions about the quality of service provided by the government".
  
2. Hello, my name is [INSERT]. I'm calling from Phoenix Strategic Perspectives, a Canadian public opinion research firm. We are organizing a series of discussion groups and interviews on behalf of Service Canada. Would you prefer to continue in English or French? / Préférez-vous continuer en français ou en anglais? Your feedback will help to provide better service to Canadians. People who take part will receive a cash gift to thank them for their time.
  - 01 English
  - 02 French
  
3. Participation in this research is voluntary and confidential. We are interested in hearing your opinions only; no attempt will be made to sell you anything or change your point of view. People who take part will receive a cash gift to thank them for their time. Would you be interested in taking part in this study?
  - 01 Yes [CONTINUE]
  - 02 No [THANK AND TERMINATE]
  
4. Before we invite you to take part, I need to ask you a few questions to ensure that we get a good mix of participants. This will take 5 minutes. May I continue?
  - 01 Yes [CONTINUE]
  - 02 No [THANK AND TERMINATE]

**RECRUITER NOTES:**

- IF ASKED HOW WE GOT THE PERSON'S NAME, SAY: In case of client list 4: "We received names and telephone numbers from community outreach liaison service agents at Service Canada who asked clients on the phone at the end of the service interaction if they were interested to participate in research. We only got names from clients who agreed with this. For other lists: "It was drawn from a random sample of Canadians who received service from the Government of Canada and specifically, from Service Canada in the last few months."
- IF ASKED ABOUT THE VALIDITY OF THE RESEARCH, SAY: This research is registered with the Canadian Research Insights Council's Research Verification Service. To confirm the validity of the study, you may access the Research Verification Service through the following URL [TO BE ADDED] and enter the project registration number: TO BE ADDED.
- IF ASKED ABOUT PRIVACY, SAY: "The personal information you provide is governed in accordance with the *Privacy Act* and will not be linked with your name on any document including the consent form. In

addition to protecting your personal information, the *Privacy Act* gives you the right to request access to and correction of your personal information. You also have the right to file a complaint with the Privacy Commissioner of Canada if you think your personal information has been handled improperly. The final report written by Phoenix SPI will be available to the public from Library and Archives Canada (<http://www.bac-lac.gc.ca/>).

## B. Eligibility

5. Do you or a member of your household work for...? [READ LIST]
- a. A marketing research, public relations firm, or advertising agency
  - b. The media (i.e., radio, television, newspapers, magazines, etc.)
  - c. A federal or provincial government department or agency
- 01 Yes [THANK AND TERMINATE]  
02 No [CONTINUE]  
03 DK/NR [THANK AND TERMINATE]

[WHEN TERMINATING A CALL WITH SOMEONE, SAY: Thank you for your cooperation. We already have enough participants who have a similar profile to yours, so we are unable to invite you to participate in the study.]

### ADMIN LISTS

6. RECORD FROM SAMPLE: Gender, age, region, official language, and program (EI-Sickness, CPP-D, SIN).

### EI ADMINISTRATIVE DATABASE:

7A. Do you identify as a person with a disability? [READ IF NEEDED: For the purposes of this study, a person with a disability is a person with any impairment or functional limitation, (such as vision, hearing, mobility, flexibility, dexterity, pain, learning, developmental, memory or mental health-related). The limitation may be permanent, temporary or episodic in nature, evident or not, that prevents a person's full and equal participation in society due to physical, architectural, technological or attitudinal challenges.]

- 01 Yes [PERSON WITH A DISABILITY]  
02 No  
03 DK/NR

### EI AND CPP-D ADMINISTRATIVE DATABASES:

7. Thinking about your application for [EI Sickness / CPPD], what is your [EI-SICKNESS: 'medical condition' / CPP-D: 'disability'] related to? [RECORD SPECIFIC DISABILITY AND THEN CODE BY TYPE.]

RECRUITER NOTES:

**IF ASKED WHY THEY ARE BEING ASKED ABOUT THEIR MEDICAL CONDITION OR DISABILITY, SAY:**

Through this research, Service Canada wants to get a better understanding of the service experience of people with different types of disabilities or medical conditions when they access government benefit programs. Your feedback will help support the development of better accessible services.

Medical condition / Disability: \_\_\_\_\_

- 01 Physical\* [Target Population #1: Persons with a disability: INTERVIEW]
- 02 Seeing [Target Population #1: Persons with a disability: INTERVIEW]
- 03 Hearing [Target Population #1: Persons with a disability: INTERVIEW]
- 04 Cognitive\*\* [Target Population #1: Persons with a disability: INTERVIEW]
- 05 Other\*\*\* [Target Population #1: Persons with a disability: INTERVIEW]

\*This may include mobility, flexibility and dexterity and (prolonged) pain issues, such as (but not limited to) the following:

- Absent limb/reduced limb function
- Arthritis, osteoarthritis, rheumatoid arthritis
- Cerebral palsy
- Epilepsy
- Multiple Sclerosis (MS)
- Muscular Dystrophy (MD)
- Motor Neurone Disease (MND)
- Spinal cord injury
- Paraplegia

\*\*This may include learning, developmental, memory or mental health-related disabilities, such as (but not limited to) the following:

- Aphasia (difficulty finding words, writing, or understanding language)
- Autism
- Attention deficit disorder
- Brain injury
- Dementia
- Developmental (down syndrome)
- Dyslexia
- Intellectual loss
- Learning disabilities

Other: \*\*\*Medical reasons for which someone may not be able to work and therefore have applied for EI Sickness benefits includes (not prolonged)

- Injuries
- Cancer
- Concussion
- Mental health

**EI, CPP-D AND SIN ADMINISTRATIVE DATABASES:**

8. How did you contact Service Canada to get service related to [INSERT FROM SAMPLE: CPP-D / EI-SICKNESS / SIN]? [DO NOT READ LIST UNLESS NECESSARY; ACCEPT ALL THAT APPLY]

- 01 Phone  
[ASK Q8A]
- 02 Service Canada Centre or in person at an office [ASK Q8B]
- 03 Online service request form/eServiceCanada\*
- 05 eSIN\*
- 06 Online (general)\*

\*[Target Population #2: New Service Channel Users: ELIGIBLE. EI AND CPP-D DATABASES GO TO SECTION C; SIN DATABASE CONTINUE]

RECRUITER NOTES:

**03 eServiceCanada** is a call-back service where a Service Canada representative calls back within 2 business days after a Service Request Form is completed online. If the issue cannot be resolved through the phone an appointment can be scheduled at a Service Canada Centre.

**05 eSIN:** is an online application form for SIN

8A. [ASK IF Q8=01 ONLY] You said you received service from Service Canada by phone. There are different types of telephone services, and we'd like to know which you used. Did you use: [READ]

- 01. EI, pensions or SIN call centres  
[GO TO Q9 IF SIN DATABASE]
- 02. eService Canada\*, or
- 04. [DO NOT READ] Unsure what telephone service I used. [GO TO Q9 IF SIN DATABASE]

\*[Target Population #2: New Service Channel Users: ELIGIBLE. EI AND CPP-D DATABASES GO TO SECTION C; SIN DATABASE CONTINUE]

RECRUITER NOTES:

**01. EI, pensions and SIN call centres** answer more specific questions about application and benefits; they ask callers to confirm their identity when they call.

**02. eService Canada** is a call-back service where a Service Canada representative calls back within 2 business days after a Service Request Form is completed online.

**IF MENTIONED: 1 800 O-Canada** provides general information on Government of Canada programs including who can apply, how to apply and how to contact the program. **ASK IF THEY USED THIS IN ADDITION TO ONE OF THE OTHER TELEPHONE SERVICES AND RECORD THE RESPONSE.**



8B. [ASK IF Q8=02 AND/OR 04] You said you received service in person at a Service Canada Centre. Did you... ? [READ LIST]

- 01 Book an appointment, or\*
- 02 Walk in\*
- 03 [VOLUNTEERED] DK/NR\*\*

\*[Target Population #2: New Service Channel Users: ELIGIBLE. EI AND CPP-D DATABASES GO TO SECTION C; SIN DATABASE CONTINUE]

\*\*[EI AND CPP-D DATABASES GO TO SECTION C; SIN DATABASE CONTINUE]

**EI AND CPP-D ADMINISTRATIVE DATABASES GO TO SECTION C**

**SIN DATABASES:**

9. Were you born in Canada?

- 01 Yes [GO TO Q11]
- 02 No [CONTINUE]
- 03 DK/NR [THANK AND TERMINATE]

10. How long have you been in Canada? [READ LIST]

- 01 Less than a year [NEWCOMER; GO TO SECTION C]
- 02 1 to just under 2 years [NEWCOMER; GO TO SECTION C]
- 03 2 to 3 years [NEWCOMER; GO TO SECTION C]
- 04 More than 3 years [CONTINUE]
- 05 DK/NR [THANK AND TERMINATE]

11. Do you identify as a person with a disability? [READ IF NEEDED: For the purposes of this study, a person with a disability is a person with any impairment or functional limitation, (such as vision, hearing, mobility, flexibility, dexterity, pain, learning, developmental, memory or mental health-related). The limitation may be permanent, temporary or episodic in nature, evident or not, that prevents a person's full and equal participation in society due to physical, architectural, technological or attitudinal challenges.]

- 01 Yes [PERSON WITH A DISABILITY\*]
- 02 No [\*]
- 03 DK/NR [THANK AND TERMINATE]

**\*ASSIGN AUDIENCE – YOUTH, SENIORS, DISABILITY – AS NEEDED TO FILL QUOTAS AND GO TO SECTION C. IF NOT NEEDED, THANK AND TERMINATE.**

**SERVICE CHANNEL LISTS**

NO ADMINISTRATIVE INFORMATION AVAILABLE, I.E., GENDER, AGE, REGION, OFFICIAL LANGUAGE, AND PROGRAM.

12. We have been asked to speak to participants from all different ages. May I have your age please?

RECORD: \_\_\_\_\_.

- 01 18 to 24 years [CONTINUE; ELIGIBLE AS 'YOUTH']
- 02 25 to 30 years [CONTINUE; ELIGIBLE AS 'YOUTH']
- 03 31 to 40 years [CONTINUE]
- 04 41 to 50 years [CONTINUE]
- 05 51 to 59 years [CONTINUE]
- 06 60 to 64 years [CONTINUE; ELIGIBLE AS 'SENIOR']
- 07 65 to 70 years [CONTINUE; ELIGIBLE AS 'SENIOR']
- 08 71 to 74 years [CONTINUE; ELIGIBLE AS 'SENIOR']
- 09 75+ years [CONTINUE; ELIGIBLE AS 'SENIOR']
- 10 DK/NR [THANK AND TERMINATE]

13. Do you identify as a person with a disability? [READ IF NEEDED: For the purposes of this study, a person with a disability is a person with any impairment or functional limitation, (such as vision, hearing, mobility, flexibility, dexterity, pain, learning, developmental, memory or mental health-related). The limitation may be permanent, temporary or episodic in nature, evident or not, that prevents a person's full and equal participation in society due to physical, architectural, technological or attitudinal challenges.]

- 01 Yes [PERSON WITH A DISABILITY\*]
- 02 No [\*]
- 03 DK/NR [THANK AND TERMINATE]

**IF PWD AT Q13 AND SENIOR OR YOUTH AT Q12, ASSIGN AUDIENCE AS NEEDED TO FILL QUOTAS.**

14. Were you born in Canada?

- 01 Yes [SKIP TO Q16]
- 02 No [CONTINUE]
- 03 DK/NR [THANK AND TERMINATE]

15. How long have you been in Canada? [READ LIST]

- 01 Less than a year [NEWCOMER; CONTINUE]
- 02 1 to just under 2 years [NEWCOMER; CONTINUE]
- 03 2 to 3 years [NEWCOMER; CONTINUE]
- 04 More than 3 years [CONTINUE]
- 05 DK/NR [THANK AND TERMINATE]

**IF NEWCOMER AT Q15 AND SENIOR OR YOUTH AT Q12, ASSIGN AUDIENCE AS NEEDED TO FILL QUOTAS.**

16. How often, if at all, do you use online services such as online banking, shopping and bill payments?

- |                 |               |
|-----------------|---------------|
| 01 All the time | [SKIP TO Q18] |
| 02 Sometimes    | [SKIP TO Q18] |
| 03 Rarely       | [CONTINUE]    |
| 04 Never        | [CONTINUE]    |

17. How comfortable are you using online services? Are you...

- |                           |                          |
|---------------------------|--------------------------|
| 01 Very comfortable       | [CONTINUE]               |
| 02 Moderately comfortable | [CONTINUE]               |
| 03 Not very comfortable   | [E-VULNERABLE; CONTINUE] |
| 04 Not at all comfortable | [E-VULNERABLE; CONTINUE] |

18. What language do you speak most often at home?

- |            |                       |
|------------|-----------------------|
| 01 English | [CONTINUE]*           |
| 02 French  | [CONTINUE]*           |
| 03 Other   | [ALLOPHONE; CONTINUE] |
| 04 DK/NR   | [THANK AND TERMINATE] |

19. What program did you contact Service Canada about to get service or information? [DO NOT READ LIST; ACCEPT ALL THAT APPLY]

- 01 Employment Insurance or 'EI'
- 02 EI-Sickness
- 03 Canada Pension Plan or 'CPP'
- 04 CPP-Disability
- 05 Old Age Security or 'OAS'
- 06 Guaranteed Income Supplement or 'GIS'
- 07 Your Social Insurance Number or 'SIN'
- 08 Passport
- 09 Other Government of Canada program. [RECORD PROGRAM]

20. In which province or territory do you live?

- 01 Alberta
- 02 British Columbia
- 03 Manitoba
- 04 New Brunswick
- 05 Newfoundland and Labrador
- 06 Northwest Territories
- 07 Nova Scotia
- 08 Nunavut
- 09 Ontario
- 10 Prince Edward Island

- 11 Quebec
- 12 Saskatchewan
- 13 Yukon
- 14 DK/NR [THANK AND TERMINATE]

21. Do you identify as...? [READ LIST]

- 01 Female
- 02 Male
- 03 Or another gender.
- 04 DO NOT READ: Prefer not to say

**GO TO SECTION C**

**C. Online Capability, Industry Screening and Consent**

We have a few final questions for you.

22. [EVERYONE] Have you ever attended a discussion group or taken part in an interview on any topic that was arranged in advance and for which you received money for your participation?

- 01 Yes [CONTINUE]
- 02 No [GO TO Q27]
- 03 DK/NR [THANK AND TERMINATE]

23. When did you last attend one of these discussion groups or interviews?

- 01 Within the last 6 months [THANK AND TERMINATE]
- 02 6 months to under 2 years [CONTINUE]
- 03 2 or more years [GO TO Q27]
- 04 DK/NR [THANK AND TERMINATE]

24. How many discussion groups have you attended in the past 5 years?

- 01 Fewer than 5 [CONTINUE]
- 02 5 or more [THANK AND TERMINATE]

25. The INTERVIEW will be recorded. The recordings will be used only by the research professional to assist in preparing a report on the findings and they will be destroyed once the report is final. Do you agree to be recorded for research purposes only?

- 01 Yes [GO TO Q29]
- 02 No [THANK AND TERMINATE]
- 03 DK/NR [THANK AND TERMINATE]

## D. Invitation to Participate

### → ONLINE FOCUS GROUPS

We would like to invite you to attend the online focus group session where you will exchange your opinions in a moderated video session with others. All opinions will remain anonymous and will be used for research purposes only in accordance with laws designed to protect your privacy. The discussion will be led by a researcher from the public opinion research firm, Phoenix Strategic Perspectives. The group will take place on [DAY OF WEEK], [DATE], at [TIME]. It will last 1 hour and 15 minutes. Information regarding how to participate will be sent to you by email in the coming days. You will be asked to log into the online session 15 minutes prior to the start time. People who participate will receive \$75 to thank them for their time. Your decision to participate or not will not affect any dealings you may have with the Government of Canada.

26. Are you willing to participate?

- |          |                       |
|----------|-----------------------|
| 01 Yes   | [CONTINUE]            |
| 02 No    | [THANK AND TERMINATE] |
| 03 DK/NR | [THANK AND TERMINATE] |

27. May I have your contact information so that we can send you information related to the online focus group? Please be assured that this information will be kept strictly confidential.

First name:  
Last Name:  
Phone number:  
Email:

**Thank you very much for your time and willingness to participate in this research.**

### → INTERVIEWS

We would like to invite you to participate in a telephone interview which will be conducted by a researcher from the public opinion research firm, Phoenix Strategic Perspectives. It will last up to 30 minutes. We will contact you to schedule a date and time that works best with your schedule for the interview. People who participate will receive \$50 to thank them for their time. Your decision to participate or not will not affect any dealings you may have with the Government of Canada.

28. Are you willing to participate?

- |          |                       |
|----------|-----------------------|
| 01 Yes   | [CONTINUE]            |
| 02 No    | [THANK AND TERMINATE] |
| 03 DK/NR | [THANK AND TERMINATE] |

29. May I have your contact information to schedule the telephone interview? Please be assured that this information will be kept strictly confidential.

First name:

Last Name:

Phone number:

Email:

**Thank you very much for your time and willingness to participate in this research.**

## 3. Discussion Guide

### Introduction (5 minutes)

---

→ Introduce moderator/firm and welcome participants to the focus group.

TECHNICAL CHECK; CONFIRM SOUND AND VIDEO QUALITY.

- Thank you for attending/value your being here.
- Tonight, we're conducting research on behalf of Service Canada.
- We'll be asking for opinions about the quality of service you received from Service Canada.
- The discussion will last approximately 75 minutes.

→ Describe focus group.

- This is a "virtual round table" discussion.
- My job is to facilitate the discussion, keeping us on topic and on time.
- Your job is to offer your opinions. There are no right or wrong answers.
- I'd like to hear from everyone, so we have a range of opinions.
- I'll try to call on you, but feel free to wave if you want to contribute.

→ Explanations.

- Comments treated in confidence.
  - Anything you say during these groups will be held in confidence.
  - Our report summarizes the findings but does not mention anyone by name.
  - We encourage you to not provide any identifiable information about yourself.
- Your responses will in no way affect any dealings you have with the Government of Canada.
- The session is being video recorded. The recordings remain in our possession and will not be released to anyone, even to the Government of Canada, without your written consent.
  - Recording is for report writing purposes/verify feedback.
- There are people from Service Canada involved in this project who will be observing tonight's online session.
  - Purpose: oversee the research process and see your reactions first-hand.

→ Any questions?

→ Roundtable introduction: Let's start with everyone introducing themselves?

### Service Canada Experience (45 mins)

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All of you are here tonight because you have recently been in contact with Service Canada to get information or service related to a government program. I'd like to start the group with a discussion of your recent experience with Service Canada.

1. For what purpose did you contact Service Canada? [ROUND TABLE]

IF NOT CLEAR ASK:

- Was it to get information about a benefit, to apply for a benefit<sup>19</sup> or Social Insurance Number, or to follow-up on your application<sup>20</sup>. Or was it a combination of these?  
If unsure of the meaning of benefit: For example, were you looking for information or trying to apply for Employment Insurance, a pension or a disability benefit?
- For which program/benefit did you apply for?

MODERATOR: NOTE WHO APPLIED FOR A PROGRAM AND WHO OBTAINED INFORMATION ONLY.

2. How did you first become aware of the availability of the benefit? MODERATOR: KEEP BRIEF. NOTE ANY DIFFERENCES BY PROGRAM. PROMPT IF NEEDED: Did you hear about it from a friend or family member, news media, or advertising, for example?
3. Now, I would like to know how you **got information** from Service Canada, about the program, including things like eligibility requirements if applicable and how to apply? MODERATOR: NOTE ANY DIFFERENCES BY PROGRAM. IF THE INTERNET IS MENTIONED OR ONLINE/ONLINE SEARCHES, PROBE FOR DETAILS/SPECIFIC WEBSITES. GOING FORWARD WE TO FOCUS ON SERVICE CANADA CHANNELS AND NOT FRIENDS, FAMILY OR OTHER WEBSITES.

MODERATOR PROMPTS: Did you go to the Canada.ca website? Call a call centre? Did you submit a form for someone to call you back?

- Why did you use that service channel\* to get information about the program?

\*MODERATOR: IF IT'S NOT CLEAR, ENSURE EVERYONE UNDERSTANDS THE TERM 'SERVICE CHANNEL'. INDIVIDUALS MAY NOT COMMUNICATE WHAT CHANNEL THEY USED BY NAME AND THE MODERATOR MAY NEED TO PROBE FOR FURTHER DESCRIPTION TO MATCH UP THE CLIENT EXPERIENCE WITH WHICH SERVICE CHANNEL THE CLIENT IS DESCRIBING. THERE ARE THE MORE TRADITIONAL SERVICE CHANNELS: OFFICE/IN-PERSON SERVICE CHANNEL, WEB-BASED AND ONLINE SERVICE CHANNELS, THE MAIL CHANNEL AND THE DIFFERENT PHONE SERVICE CHANNELS. FOR THE NEW SERVICE CHANNELS: eServiceCanada and eSIN. REFER TO ANNEX 1 FOR INFORMATION ABOUT THESE CHANNELS.

- Did you have any difficulties using the channel? If so, what?
- IF MULTIPLE CHANNELS:
  - i. Did you have more difficulty with certain service channels? If so, why?
  - ii. What worked and what didn't?
  - iii. Which channel did you try first and why? Did it help you to get what you needed to get to the next step?
  - iv. Did you face any challenges or barriers<sup>21</sup>? If so, what?
  - v. [ASK ALL CLIENTS] For those of you who experienced (a) challenge or barrier(s), what did you do to overcome it/them? Did you know where to go at Service Canada to get help? Were you helped? How did you get help? Were you given an opportunity to make corrections, seek assistance, or raise concerns?
    - How were you helped?

<sup>19</sup> MODERATOR: This Includes both completing and submitting the application.

<sup>20</sup> MODERATOR: examples of follow up are: getting a status update on your application, asking assistance with claimant reports or support with a claim conversion for EI, or change of address for pensions, providing additional information if a change in a person's status requires this.

<sup>21</sup> MODERATOR: See Barrier definition and probes for client with a disability in Annex 2.



- Did anyone help you to have access to the information you were looking for? What was hindering you to get immediate access to what you needed?
  - Did you find the application?
  - From whom did you receive help or support?
  - How many times did you receive support when you were looking for information (on how to apply)? Did you understand the information?
  - Are you aware of how to get help?
  - Are you aware where to make complaints?
- vi. Which channel did you try next and why? How did you become aware of this channel?
- In the end, did you get what you needed?  
MODERATOR: NOTE THAT IT'S POSSIBLE THAT CLIENTS GOT WHAT THEY NEEDED TO TAKE THE NEXT STEPS AND THAT SHOULD BE UNDERSTOOD AS SUCH.
  - What would have made your experience easier?
4. How did you **apply** for the program? What were the steps you needed to go through to complete your service request? MODERATOR: NOTE ANY DIFFERENCES BY PROGRAM.
- MODERATOR PROMPTS: Did you go to the Canada.ca website? Call a call centre? Did you submit a form for someone to call you back? Did someone contact you and help you to book an appointment or did you walk-in to a Service Canada Centre?
- Why did you use that service channel to apply?
  - What worked and what didn't?
  - Did you have any difficulties completing the application form? If so, what was the nature of the challenge?  
PROMPT: Did it relate to your understanding of what was being asked? Was there anything specific? Did it relate to how you were expected to submit the application?
  - Did you have any difficulties using the channel? If so, what?
  - IF MULTIPLE CHANNELS:
    - i. Which channel did you try first and why?
    - ii. What worked and what didn't?
    - iii. Did you face any challenges or barriers<sup>22</sup>? If so, what?
    - iv. [ASK ALL CLIENTS] For those of you who experienced a challenge or barrier, did you get help or support?
      - What type of help or support did you receive?
      - Did anyone help you to complete and submit your application?
      - From whom did you receive help?
      - How many times during the application process did you receive help?
      - Are you aware of where to go to make complaints?
    - v. Which channel did you try next and why? How did you become aware of this channel?
    - vi. Why did you not use the same channel to re-contact Service Canada?

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<sup>22</sup> MODERATOR: See probes for client with a disability in Annex 2.

- vii. Do you have more difficulty with certain service channels? If so, how so?
    - In the end, did you get what you needed? MODERATOR: NOTE THAT IT'S POSSIBLE THAT CLIENTS GOT WHAT THEY NEEDED TO TAKE THE NEXT STEPS AND THAT SHOULD BE UNDERSTOOD AS SUCH
- 5. Did anyone want to **follow-up** on your application? [COUNT] If so, how did you follow-up? MODERATOR: NOTE ANY DIFFERENCES BY PROGRAM.  
  
MODERATOR PROMPTS: Did you go to the Canada.ca website? Call a call centre? Did you submit a form for someone to call you back? Did someone contact you and help you to book an appointment or did you walk-in to a Service Canada Centre?
  - Why did you use that service channel?
  - Was there anything preventing you from tracking and following up on your application/service request. Did you have any difficulties using the channel? Is so, what?
  - IF MULTIPLE CHANNELS:
    - i. Which channel did you try first and why?
    - ii. What worked and what didn't?
    - iii. Did you face any challenges or barriers<sup>23</sup>? If so, what?
    - iv. [ASK ALL CLIENTS] For those of you who experienced a challenge or a barrier, did you get help or support?
      - What type of help did you receive?
      - Did anyone help you to follow-up on understanding the status of your application?
      - From whom did you receive help?
      - How many times did you receive help when you were trying to understand the status of your application?
      - Are you aware of where to go to make complaints?
    - v. Which channel did you try next and why? How did you become aware of this channel?
    - vi. Why did you not use the same channel to re-contact Service Canada?
    - vii. Do you have more difficulty with certain service channels? If so, how so?
  - In the end, did you get what you needed? MODERATOR: NOTE THAT IT'S POSSIBLE THAT CLIENTS GOT WHAT THEY NEEDED TO TAKE THE NEXT STEPS AND THAT SHOULD BE UNDERSTOOD AS SUCH.
- 6. How would you describe your overall experience applying for a program with Service Canada? Keep in mind the entire experience, from getting information about the program, applying and receiving a decision from Service Canada, and the different service channels used.
  - Was it positive or negative and why?
    - PROBE FOR DIFFERENCES BY CHANNEL, PROGRAM, AND TASK.
  - Was anything difficult? If so, what and why? MODERATOR: NOTE PROGRAM AND TASK.
  - IF MULTIPLE MENTIONS:
    - What was the *most* difficult aspect of this service experience? Why?

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<sup>23</sup> MODERATOR: See probes for client with a disability in Annex 2.

7. Based on your recent experience, did you prefer one channel over another or did you find it easier to use one particular channel? Why?

[ONLY ASK CLIENTS WITH A DISABILITY]

- 7b. Do you think that Service Canada staff are properly trained and equipped to meet your specific needs? Why do you say that?

→ Does any particular experience you had stand out as particularly helpful in meeting your specific needs? What was it and why?

[IF NEW SERVICE CHANNELS WERE USED]

8. Those of you who used one of Service Canada's new service channels. MODERATOR: REMIND PARTICIPANTS AS APPROPRIATE: eServiceCanada and eSIN. All things considered, what positive or negative impact did the [INSERT CHANNEL NAMES] have on your experience with Service Canada? Would you suggest using this channel to someone you knew who needed help with applying for a benefit or SIN? If not, why not?

## Recommendations/Future Directions (15 mins)

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Thinking about your recent experience and the challenges we've discussed to accessing service, I'd like to spend a few minutes talking about potential improvements.

9. What, if anything, can Service Canada do to address some of the challenges you faced? REMIND PARTICIPANTS OF CHALLENGES, IF NECESSARY. WAIT FOR TOP-OF-MIND RESPONSES AND THEN PROBE BY SERVICE CHANNELS USED.

- Phone? (P)
- Online (includes eSIN)? (O)
- eServiceCanada? (eSC)
- Service Canada Centres? (SCC)

MODERATOR PROMPT: Raise some of the options to improve accessible service.

- Clearer information provided during my calls with Service Canada representatives (P)
- An application form that is shorter and less complicated (O)
- The Service Canada employee can do more with my request while they are on the phone with me (P, eSC, SCC)
- More helpful service (P, O, eSC, SCC)
- Reduced wait time (P, eSC, SCC)
- A higher degree of professionalism (attitude, courtesy) and/or respectfulness (P, eSC, SCC)
- Different type of service or information (e.g. to look at my file) (P, eSC, SCC)
- Different hours of service (longer hours, outside of regular business hours) (P, eSC, SCC)
- Greater Accessibility/accommodation for my (disability) needs (P, O, eSC, SCC)
- Service in my language of choice, other than English or French (P, O, eSC, SCC)

- Open a Service Canada office closer to where I live (SCC)
- Provide access to free internet/Wi-fi at Service Canada Centres (SCC)
- Other for anything that is not listed but clients identify
- No selection. The service was great as is.

MODERATOR PROMPT: Create a list based on feedback to fill the poll in question 10. If the moderator can't create the list on the fly, use the list of prompts above. Add other for anything that is not listed but clients identify.

10. I have listed your suggestions on the screen. Does everyone see this? I want you to indicate what one improvement would have had the most impact on your ability to access the services you requested.

POLL:

What one improvement would have had the most impact on your ability to access the services you requested?

Insert the raised options from client feedback from question 9

Now let's talk about this as a group. [CHECK POLL RESULTS AND ADJUST DISCUSSION BASED ON RESULTS].

11. How about....[INSERT ITEMS] Why would this have an impact? Why wouldn't this have an impact?

## Conclusion (10 mins)

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We're nearing the end of the discussion.

12. [ONLY ASK CLIENTS WITH A DISABILITY] How does Service Canada compare with other organizations in terms of delivering services? Is it more or less accessible?

- What makes Service Canada's service more accessible than other organizations?
- What makes Service Canada's service less accessible?
- Are there supports or assistive devices that work best for you or you prefer to help you when accessing a service?

13. Do you have any (other) suggestions for Service Canada to consider to make access to its programs more user-friendly?

Those are all the questions I have. Is there anything you would like to add? Do you have any last comments or suggestions about anything we have discussed tonight?

On behalf of Service Canada, I would like to thank you for your time and participation today.

**You can all log out now. Have a great evening!**

### **Annex 1: New Service Channels**

**eServiceCanada** is a call-back service where a Service Canada representative calls you back within 2 business days after a Service Request Form is completed online. If the issue cannot be resolved through the phone, an appointment can be scheduled in and made Service Canada Centre.

**eSIN:** is an online application form for SIN.

### **Annex 2:**

A **barrier** means anything — including anything physical, architectural, technological or attitudinal, anything that is based on information or communications or anything that is the result of a policy or a practice — that hinders the full and equal participation in society of persons with an impairment, including a physical, mental, intellectual, cognitive, learning, communication or sensory impairment or a functional limitation.

THESE ARE THE **5 SERVICE AREAS** SERVICE CANADA HAS IDENTIFIED THAT CREATE CHALLENGES FOR PEOPLE LIVING WITH A DISABILITY. USE TO PROMPT/ANCHOR THE DISCUSSION, IF NEEDED.

- Physical space: travelling to a building, design elements, signage
- Policies and processes that make access difficult (e.g., not allowing agents to complete forms)
- Language and information: complexity of language, lack of accessible formats
- Awareness and attitude: accessibility features are not promoted, staff not properly trained
- Technology: some systems do not support the use of assistive devices, etc.