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du Canada

# Qualitative Research on CRA's Secure Portals with Tax Intermediaries

Final Report

Prepared for the Canada Revenue Agency

Prepared by Sage Research Corporation

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***Ce rapport est aussi disponible en français.***

# Qualitative Research on CRA's Secure Portals with Tax Intermediaries

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## Prepared for Canada Revenue Agency

Supplier Name: Sage Research Corporation

January 2023

The Canada Revenue Agency (CRA) commissioned Sage Research Corporation to conduct a qualitative public opinion research study on various aspects of the CRA's secure online portals. Five two-hour online focus groups were conducted between November 3 and 15 2022, with one group in each of the following regions: Atlantic, Quebec, Ontario, Prairies and Pacific. For all focus groups, the qualified participant was a tax intermediary professional working in a small or medium-sized firm who acts as a representative for small or medium business clients or individual clients on tax matters.

Cette publication est aussi disponible en français sous le titre: Recherche qualitative sur les portails sécurisés de l'Agence avec des intermédiaires fiscaux.

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# Executive Summary

Given the current environment and as more Canadians make use of online services, the Canada Revenue Agency (CRA) is reaching out to tax intermediaries to explore channel preferences for tax filing and capturing their experiences when accessing and using the CRA's secure portals (*My Account*, *My Business Account*, and *Represent a Client*). This research project is intended to identify and explore barriers that may impact the ability to effectively use the secure portals and determine which services/assistance could increase the overall client experience.

## 1. Research Purpose and Objectives

The objectives of this research were to:

- Explore reactions to the concept of single sign-in and to proposed designs for the single sign-in log-in and *Welcome* pages. Single sign-in will provide access to the CRA's digital services from a single authenticated secure portal, as compared to the current system of separate sign-in pages for *My Account*, *My Business Account*, and *Represent a Client*.
- Get suggestions from tax intermediaries for the functionality of a new online service that will be a centralized hub for future communications and interactions with the CRA. This centralized hub will include the *Mail* section of the secure portal landing pages as well as other capabilities for communication and interaction with the CRA.
- Explore reactions to a new design and new features for the *Mail* section of the secure portal landing pages.

## 2. Methodology

Five two-hour online focus groups were conducted between November 3 and 15, 2022, with one group in each of the following regions: Atlantic, Quebec, Ontario, Prairies and Pacific. For all focus groups, the qualified participant was a tax intermediary professional working in a small or medium-sized firm who acts as a representative for small or medium business clients or individual clients on tax matters. Additionally, all used the CRA's secure portals at least several times per week, either on average during the year or during tax filing season. There were five to six participants in each group, for a total of 28 participants. Participants were paid an honorarium of \$225.

## 3. Limitations and use of the findings

This research was qualitative in nature, not quantitative. As such, the results provide an indication of participants' views about the topics explored, but cannot be statistically generalized to represent the full population. Qualitative research does, however, produce a richness and depth of response not readily available through other methods of research. It is the insight and direction provided by qualitative research that makes it an appropriate tool for exploring participants' opinions on the CRA's secure portals.

Results from the research will be used to support and influence business decisions, to inform the design, development, and enhancements of digital services. The findings will be shared with

program areas to identify opportunities where programs, services, and large-scale projects can be adapted to better address user needs digitally.

## 4. Key Findings

### 4.1 Single Sign-in

Reaction to the single sign-in concept depended on whether the participants were considering their usage as a tax intermediary or as a business client user of the CRA's secure portals. In terms of their usage as a tax intermediary, the majority did not see a benefit to single sign-in, as most of their usage is through *Represent a Client*. However, most said this would be good for business clients who have both a personal *My Account* (MyA) and one or more businesses – and therefore one or more *My Business Accounts* (MyBA). The perceived benefits for business clients included:

- The user sees all their accounts in one place, which gives them a better view of all their accounts with the CRA.
- The user does not have to manage/keep track of multiple log-in credentials. Single sign-in makes it more convenient to access different accounts.

Small numbers of participants (one or several participants each) voiced concerns or made suggestions:

- With single sign-in, security is an even greater concern, because if a user's single sign-in is "hacked", the damage is greater because all their CRA accounts are exposed.
- Another security-related concern stemmed from including both personal and business accounts together, and the possibility that a coworker might see personal information that they are not authorized to access.
- Several suggested continuing to maintain the ability to log in directly to *Represent a Client*, given most of the time they only access *Represent a Client*, and this would avoid the extra step of first logging in to the single sign-in page.

Participants were shown mock-ups of the single sign-in log-in page, the *Welcome* page that provides access to the user's accounts, and a demonstration of how to switch to a different account after selecting a particular account.

**Log-in page:** Participants liked the design, and some particularly liked putting log-in options side-by-side, thereby reducing the need to scroll.

**Welcome page and account switching:** There was widespread positive reaction to the *Welcome* page and to the process for switching accounts from a particular account page. Positive perceptions included:

- Overall a good design in terms of appearance and layout
- Both the *Welcome* page and the account switching processes are user-friendly and easy to navigate
- The accounts – both on the *Welcome* page and the drop-down *Switch account* menu – flag when there is unread mail

Participant suggestions included:

- Some participants suggested including the ability to create a nickname for an account. This would be particularly helpful when a user has multiple numbered companies, as a nickname could be easier to use to quickly identify a company as opposed to a company number.
- Several suggested having the ability to rearrange the position/order of accounts by dragging them. This could be used to position similar accounts together, or to put a frequently accessed account at the top – such as the *Represent a Client* account for a tax intermediary.

## 4.2 Communications Hub

Participants made a variety of suggestions, including:

- Integrate phone calls into the communications hub. While one participant suggested the CRA agent upload their notes to the hub, several suggested that even if the content of calls with the CRA cannot be provided, it would be good if the communications hub contained a log of calls. The log would include the date, time and CRA agent ID. This would help if the caller subsequently wants to contact the CRA and refer to a specific call, with the assumption that the agent could then look at the CRA's internal record of the call and be aware of what was communicated on the call.
- Integrate regular mail into the online communications hub by including scanned copies of mailed material – including both mail sent by a client and mail sent by the CRA. Together with integration of phone calls into the hub, this would provide a more complete online record of communication with the CRA.
- Some participants suggested the hub include online text chat with a CRA agent. There were two rationales:
  - The more common rationale was that this could be a faster way of getting responses to “quick questions” as opposed to calling the CRA and waiting on hold. Note that the underlying assumption is that an agent would respond reasonably quickly to a user request to chat.
  - An online chat interaction provides a written record of what was said, which could then be incorporated into the communications hub for later reference.
- There were several suggestions to expand capabilities for sending files to the CRA. The following were each suggested by some participants:
  - Expand the types of information that can be sent to the CRA online, and a specific example mentioned by a few participants related to backdating a GST registration.
  - Increase the number of files that can be uploaded at one time to reduce the number of upload sessions for someone who has to send a lot of files.
- There were two suggestions to provide the ability to contact an appropriate CRA agent:
  - Several participants suggested that online mail from the CRA include a “request for an agent to call” option. The agent calling would presumably be knowledgeable about the matter, so this would reduce the time spent on the phone with the CRA.
  - A few participants suggested the communication hub have a way to submit an enquiry to find out who specifically to talk to at the CRA about a particular matter.

- Some suggested the CRA send a confirmation whenever it has received something from a client. The perceived benefits are:
  - It provides reassurance that the CRA has received the material.
  - It is proof that the CRA received the material, in the event such proof is needed at a later time. Note that this capability is included in the new design for *Mail*, and the example *Mail* page shown later to participants included a confirmation email.
- A few participants – with agreement from other participants – suggested the communication hub have some sort of short list of common questions (e.g. “top three questions”) from individuals or businesses that involve getting personalized information from the CRA, and the answers shown would contain the personalized information of the user.
- The moderator asked about interest in receiving notifications of an attempted contact by the CRA, and many participants agreed this would be helpful because people may be reluctant to answer a call from the CRA because of the prevalence of CRA scam calls. In this context, several participants suggested that the notification should include an option to request a callback from the CRA.
- The moderator asked about interest in receiving updates and reminders on changes for the upcoming tax filing season or to the website, and the majority agreed they would be interested, albeit more so for changes pertaining to an upcoming tax filing season.

### 4.3 Mail

Overall reaction among virtually all participants to the proposed design and features was positive, and often very positive. This included both the overall look of the page, and the various features. Of particular note:

- The messages in the list of messages are easy to read and clearly labeled, and it is good to have a flag the user can set to indicate items of higher importance. Some suggestions by a small number of participants:
  - Add a time stamp to the priority flag, so the user knows how long ago the item was flagged.
  - Include an option to enter a note in message description box. This could be a note about the current status of the matter addressed by the email, or a note to a client.
- Virtually all participants liked the reading pane opening up next to the list of messages, compared to the current system where the reading pane opens in a new window and the list of messages is no longer visible. This new way allows easier and faster scanning of different messages. Several suggested allowing the user to control, through dragging, the size of the reading pane, particularly if they want to allocate more space to it.
- With regard to sending enquiries and information, the moderator demonstrated the *Reply* function that would be on some emails, the action icon and banner, and the *Submit new* feature. All of these features were perceived to be useful. Several participants suggested the user should have the ability to remove the action icon from the message list once the item has been dealt with.

- With regard to mail filtering and sorting, participants liked the capabilities shown, including the addition of a *Search* function. There were some participant suggestions for additional filtering capabilities, including ability to: select multiple years rather than just a single year, select items requiring action – e.g. with the action icon, select unread messages, select items the user has flagged. With regard to mail sorting, one of the available sorting dimensions is referred to as *Status*. Several participants said it is unclear what this means. They wanted to know what specific dimension(s) *Status* refers to and how this would affect sorting.
- Participants liked the option to turn message threading on or off. That said, they were split in terms of whether and how they would use it: some would not use it, some would use it, and some would switch back and forth between non-threaded and threaded.

## 5. Contract Value

**Contract value:** \$62,381.65 including HST

## 6. Political Neutrality Certification

I hereby certify as Senior Officer of Sage Research Corporation that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the *Communications Policy* of the Government of Canada and Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, and standings with the electorate or ratings of the performance of a political party or its leaders.



Rick Robson  
Vice-President  
Sage Research Corporation



## Detailed Findings

### Single Sign-in

To start the discussion of single sign-in, participants were read a brief description of the concept. Note that this description was revised after the first focus group because in that first group there was a bit of confusion about whether or not an authorized representative (AR) would see client accounts after a “single sign-in.” The revised description put extra emphasis on explaining that an AR continues to use *Represent a Client* in the usual way to access client accounts.

After the initial presentation and discussion of the concept, participants were shown a mock-up of the single sign-in log-in page, followed by a mock-up of the *Welcome* page a user might see. The presentation of the *Welcome* page included demonstration of how to switch accounts. After discussion of the *Welcome* page, participants were asked if they had any suggestions for what the single sign-in service should be called.

### Reaction to the Single Sign-in Concept

For reference, the revised concept description was:

“The new single sign-In feature will provide access to the CRA’s digital services from a single authenticated secure portal. Right now, there are separate sign-in pages for *My Business Account*, *My Account*, and *Represent a Client*. With the new Single Sign-in, there will be one entry point for all of these online services.

In the case of a tax professional, you would log in to this one entry point to access your *Represent a Client* account, and any other accounts you may have. For example, you can access your *My Account* and if you have a *My Business Account* for your own business, you would also have access to that account as well.

This single entry point allows you as a tax professional to access to your *Represent a Client* account, and also any other personal or business accounts you may have with the CRA. Your access to client information as an authorized representative would continue to be done through the *Represent a Client* portal, in the usual way.”

Some participants said they would like single sign-in for themselves, while the majority said they saw no benefit for themselves based on how they use the CRA’s secure portals:

- The majority who saw no benefit for themselves in their own work as a tax intermediary working on behalf of clients, noted that most of the time they are using only *Represent a Client*, and not accessing their other accounts with the CRA. A few of these participants voiced a minor complaint that single sign-in adds an “extra click” to access client accounts – that is instead of going to the *Represent a Client* log-in page directly, they would first have to go to the single sign-in page and log in, and then click on their *Represent a Client* account – the latter being the extra click.
- The minority of participants who liked single sign-in for themselves all had multiple businesses, and liked the convenience of accessing all their accounts from one sign-in.

While the majority of participants were neutral towards single sign-in for themselves, most said this would be a good thing for business clients, who have both a personal *My Account* (MyA) and one or

more businesses – and therefore one or more *My Business Accounts* (MyBA). A few commented that for an individual who has only a personal MyA, there is no benefit – nor any downside – to single sign-in: for these types of individuals, single sign-in does not really change anything.

Notably, the small number who did not react positively to the concept in terms of client reaction also did not react negatively. The issue was more that some of their clients do not like to go online and use the secure portals, but instead rely on the tax intermediary to do this. So essentially, single sign-in would have no impact on these types of clients.

The perceived benefits for business clients included:

- The user sees all their accounts in one place, which gives them a better view of all their accounts with the CRA.
- The user does not have to manage/keep track of multiple log-in credentials. Single sign-in makes it more convenient to access different accounts.

Notably, when participants subsequently saw the example *Welcome* page for a user with multiple accounts, some became even more positive to single sign-in, in terms of benefits to business clients because of positive perceptions of the overall design of the page and the ease of switching accounts.

Several participants thought single sign-in could make it easier for a client to authorize them for multiple accounts. In this regard, some complained about a change the CRA made to the process a client has to go through to authorize a representative. As described by these participants, in the past a tax intermediary could get authorized by a client – e.g. a business client – by getting a signature. Under the current process, the client has to set up a MyBA and complete the authorization online at the MyBA – and the process is even lengthier for a client with multiple businesses and MBAs. This has caused difficulties in the case of clients who do not want to go through setting up an online account(s) with the CRA. These participants thought that if the client has all their accounts accessible in one place, then it will be easier for the client to authorize a representative for more than one account.


Small numbers of participants (one or several participants each) voiced concerns or made suggestions:

- With single sign-in, security is an even greater concern, because if a user's single sign-in is "hacked" – i.e. illegally accessed – the damage is greater because all their CRA accounts are exposed. Note, though, that none of the participants opposed single sign-in overall because of this perceived heightened risk.
- Another security-related concern stemmed from including both personal and business accounts together. For example, a participant said they worked in an office environment with other people around, and if they left their computer unattended someone might access their personal account. One participant suggested the personal MyA could have some sort of additional password requirement.
- Continue to maintain the ability to log in directly to *Represent a Client*. This suggestion came from several participants who saw no personal benefit to single sign-in in their work as a tax

intermediary given most of the time they only access *Represent a Client*. This would avoid the extra step of first logging in to the single sign-in page.

- Once a client Business number (BN) has been entered at the *Represent a Client* portal, give access to a *Welcome* page showing all the business accounts for that client for which a tax intermediary is authorized. Note that this suggestion was made after seeing the example *Welcome* page, which as noted later was very positively perceived by participants.
- Expand the scope of single sign-in to include other types of Government of Canada accounts, such as those maintained by Service Canada. One participant claimed this was the case in another country (Australia) they had worked in.

## Single Sign-in Log-in page

 Government of Canada / Gouvernement du Canada Français

**Canada Revenue Agency**

### CRA sign-in services

















**Note:** Before you can register using a sign-in partner or CRA account, you must have filed your income tax and benefit return for the current tax year or the previous one.

→] Sign-in using one of the following options:

#### Using one of our Sign-In Partners

Sign in or register with the same sign-in information you use for other online services (for example, online banking).

[Sign-in Partner](#)

#### Using a CRA user ID and password

**\* User ID (required)**

[Forgot your user ID?](#)

**\* Password (required)**

[Forgot your password?](#)

For more information on how your privacy is protected, refer to our [Personal Information Collection Statement](#)opens.



[Sign in](#) [Register](#) if you are a new user.

#### Using a provincial Partner

**⚠ Option 3 only grants access to My Account**

Sign in with your MyAlberta Digital ID or BC Services Card.

[Provincial partner sign in](#)

	
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Participants liked the design of the single sign-in log-in page, although most did not react strongly given that it is similar in content to the current log-in page design. Some commented that the page has a “clean” design.

Some particularly liked the side-by-side layout of the sign-in partner and user ID/password options. They said that currently the sign-in options on the CRAs secure portal log-in pages are arranged vertically, which can require scrolling depending on the sign-in option being used. These participants said the proposed design is more user-friendly as it eliminates the need for scrolling.

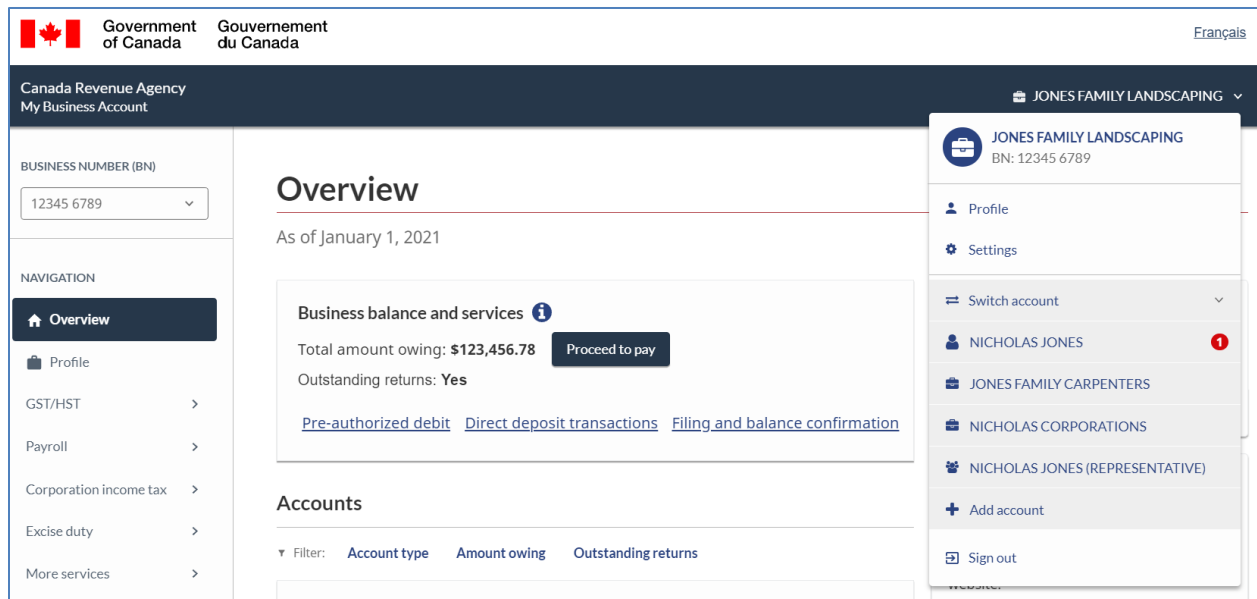
A few participants suggested the lines separating the sign-in options be a little bit darker, to visually distinguish them a little bit more, although this was evidently not an issue for most participants.

## Welcome Page & Account Switching

The screenshot displays the Canada Revenue Agency (CRA) Welcome Page. At the top, it features the Government of Canada logo and the text "Government of Canada" and "Gouvernement du Canada". The user is identified as "NICHOLAS JONES". The main heading is "Welcome", with a "Help" link. Below this, it shows the date "As of January 1, 2021" and a "Print/Save" option. The primary instruction is "Select the account you would like to access:". There are six account options arranged in two columns:

- NICHOLAS JONES** (SIN: \*\*\* \*\* \*56)
- JONES FAMILY LANDSCAPING** (Business number: 12345 6789)
- NICHOLAS CORPORATIONS** (Business number: 56789 1234)
- JONES FAMILY CARPENTERS** (Business number: 98765 4321)
- NICHOLAS JONES** (Rep ID: 1AV2C2D)
- NICHOLAS JONES** (Non-resident account #: NRK 123456)

An "Add account" button is located at the bottom left of the account selection area. At the bottom of the page, there are links for "About My Account", "Your suggestions", "Check CRA processing times", "Terms and conditions for My Account", and "Contact us". The footer includes "Terms and conditions" and "Privacy" links, along with the "Canada" logo.



After the single sign-in log-in page, participants were shown an example of the *Welcome* page a user might see. It was explained that this hypothetical user was a tax professional with a *Represent a Client* account, and *My Business Accounts* for several businesses that they owned. To illustrate the functionality of the page, the moderator clicked on one of the business accounts (Jones Family Landscaping). The moderator noted that the design of the *My Business Account* page was different from what users currently see, but that this was not for discussion. The moderator used this page to demonstrate two ways to switch to another account: (1) the account name drop-down menu on the top right to switch to a different account, and (2) the CRA link on the top left which takes the user back to the *Welcome* page.

There was widespread positive reaction to the *Welcome* page and to the process for switching accounts from a particular account page. Positive perceptions included:

- Overall a good design in terms of appearance and layout
- Both the *Welcome* page and the account switching processes are user-friendly and easy to navigate
- The accounts – both on the *Welcome* page and the drop-down *Switch account* menu – flag when there is unread mail

Some participants commented that the overall design and ease of use further reinforced the perceived benefit of single sign-in terms of ease of access to accounts. Several said that seeing this could convince some clients who are generally not interested in going online to actually use the CRA's secure portals because of the perceived ease of use.

Several participants said the design would help them in sessions where they are working with a client on multiple accounts, because of the ease of switching between accounts.

The large majority of participants were satisfied with the “box” design of each account and the labeling of accounts – i.e. it was easy to tell account type because the inclusion of “*Business number*” or “*SIN*”. Some commented that the icons also helped them to identify account type,

although some others said they had not really paid attention to the icons. There were some suggestions:

- Some participants suggested – with agreement from many other participants – that it would be good to include the ability to create a nickname for an account. They said this would be particularly helpful when a user has multiple numbered companies, as a nickname could be easier to use to quickly identify a company as opposed to a company number.
- Several participants suggested – with agreement from some others – having the ability to rearrange the position/order of accounts by dragging them. This could be used to position similar accounts together, or to put a frequently accessed account at the top – such as the *Represent a Client* account for a tax intermediary.
- A few participants suggested that the CRA group accounts of the same type together. In this regard, one participant suggested having the account type as headings – i.e. a *“My Business Account”* heading for those accounts, and a *“My Account”* heading for a personal account.

Several participants raised questions related to the *Add account* box. There were two dimensions to this:

- When the CRA switches to single sign-in, what does the user have to do in order to get their existing multiple accounts “linked together” under single sign-in? The hope was that the CRA would handle most of this, with minimal demands on the user.
- With regard to adding an account once single sign-in is established, the concern was how difficult and time-consuming this might be for the user, given the difficulty tax intermediaries already have getting some of their clients set up a CRA online account.

One participant, with agreement from a few others, said that while switching accounts from an account landing page is easy “once you know how”, it may not be apparent to a new user how to switch accounts. The suggestion was to add a control to the landing page that says, “Switch account.”

## **Name Suggestions**

Participants were asked if they had any suggestions for what to call the single sign-in system.

Overall, most participants did not have suggestions, nor were they particularly engaged by the question.

Some said “single sign-in” was a straightforward name and would be good to keep. Other suggestions, mostly each made by one participant, included:

- My Portal
- My CRA Portal
- CRA Portal
- My CRA Account
- Access Portal
- Full Access Portal
- Easy CRA Portal

- Se connecter (majority of participants in the French focus group)

## Communications Hub

Participants were shown the following description of a concept for a centralized communications hub on secure portal pages:

The CRA plans to implement an online service to become a **centralized hub** for future **communications** and **interactions** with the Agency.

Other CRA services will utilize this service to display their **communications** and **interactions** with users.

This centralized hub will include the *Mail* section, and improvements to the *Mail* user interface, and it will also include other capabilities for communication and interaction with the CRA.

The moderator then read some brief examples of changes that might be made to *Mail* in order to help stimulate ideas from participants. The question posed to participants was what suggestions they had for the functionality of this communications hub, whether involving mail or involving other aspects of communication and interaction with the CRA. After the open-ended discussion of suggestions, the moderator probed several ideas: receiving updates from the CRA, receiving notifications of attempted contact by the CRA, and suggestions for file formats that participants would like to be able to upload. Participants were then asked for suggestions on the name of the communications hub.

The next section of the discussion was to show the proposed new design for *Mail*, including demonstrating some of the new features. Some of the participants' open-ended suggestions for the communications hub pertained to features demonstrated subsequently. To avoid redundancy, these are discussed in the next section of the report, *Mail*. For reference, these suggestions pertained to:

- Making enquiries
- Message threading
- Search
- Ability to reply
- Confirmations

## Participant Suggestions for Functionality

**Integration of phone calls into the communications hub:** Several participants suggested some form of integration of phone calls with the CRA into the communications hub:

- One participant suggested that the CRA agent they spoke to upload their notes on the call to the communications hub. This would provide an explicit record of what the caller was told. The participant said that in addition to having a written record, this would be particularly useful if the caller wants subsequently to dispute or to reference what they were told by the CRA agent.
- Several participants suggested that even if the content of calls with the CRA cannot be provided, it would be good if the communications hub included a log of calls. The log would include the date, time and CRA agent ID. This would help if the caller subsequently wants to contact the CRA and refer to a specific call, with the assumption that the agent could then

look at the CRA's internal record of the call and be aware of what was communicated on the call.

- One participant suggested that in a phone call where the agent is providing general information about some topic, that the agent then send a follow-up message to the communications hub with links to the relevant information on the CRA website.

**Integration of regular mail into the communication hub:** Some participants suggested that communication sent by regular mail should also be incorporated into the online communication hub – e.g. by scanning the materials. This would include both material mailed by the CRA, and material mailed to the CRA. This would then provide a more complete online record of written communication with the CRA. This was also of particular interest to these participants in their capacity as tax intermediaries, because they said sometimes they do not see – or see on a timely basis – correspondence the CRA mails to a client. In this case, they can be alerted to something that is urgent and needs to be dealt with. One participant also commented that if a client moves and their address is not updated before the CRA sends a letter, posting it online as well makes sure that the letter is still received on a timely basis.

Notably, a few of these participants said that the communications hub should duplicate mailed letters, and not replace them. They preferred having this duplication just in case of a problem with one or the other channel.

**Online text chat:** Some participants suggested the hub include online text chat with a CRA agent. There were two rationales:

- The more common rationale was that this could be a faster way of getting responses to “quick questions” as opposed to calling the CRA and waiting on hold. Note that the underlying assumption is that an agent would respond reasonably quickly to a user request to chat – i.e. that wait times for an agent would be significantly shorter than when calling.
- An online chat interaction provides a written record of what was said, which could then be incorporated into the communications hub for later reference.

These participants did not want an AI-powered chatbot, because they felt their questions would be too specific about a particular client situation to be capable of being addressed by an AI system. That said, several said an AI-powered chatbot could be helpful for clients who are looking for general information.

A few participants expressed skepticism as to whether online text chat with an agent would be effective. Their concern was that their experience in calling the CRA with client-related questions is that it is not uncommon that the first agent who answers is not able to answer the question, and the call has to be escalated to another, “higher level” agent. Given this experience, they were skeptical about the quality of information from the agent responding to a request for text chat.

**Expand capabilities for sending files to the CRA:**

- Some participants asked for an expansion of the types of information that can be sent to the CRA online. The specific example mentioned by a few participants was documentation related to backdating a GST registration. The participants said currently they have to mail or fax the information to the CRA. One participant said they tried to use the “submit documents” service online, but the documents were not accepted.



- Some participants asked that one be able to upload a larger number of files at one time. For example, one participant had the impression one can only upload a maximum of five files at a time. These participants said that in an audit, for example, the CRA may require a large number of documents – e.g. one participant mentioned “60 invoices.”
- Related to the preceding point, a few participants suggested that the allowable file size be increased. They noted that one possible solution to the limit on the number of files that can be uploaded at one time is to put a large number of documents into a single PDF file. However, the resulting PDF may then exceed the CRA’s limit on file size.
- Participants were asked if there are any file types – in terms of the file extension – that they would like to be able to upload but which they cannot upload currently. Only one participant identified such a file type, and it was CSV files in addition to Excel files.

**Ability to directly contact an appropriate agent:** There were two suggestions of this sort:

- Several participants suggested – with agreement from others – that online mail from the CRA include a “request for an agent to call” option. The perceived benefits to this included:
  - The agent calling would presumably be knowledgeable about the matter, thereby avoiding the possibility of having to speak to multiple agents to get to the appropriate agent when calling in.
  - Associated with this, there could be much less time spent on the phone with the CRA.
- A few participants suggested the communication hub have a way to submit an enquiry to find out who specifically to talk to at the CRA about a particular matter. That is, one would enter a description of the issue, and request information on who to contact. For example, one said the type of response they would like to see to such an enquiry could be, “you need to talk to a Level B agent, and so call this number.” They said this sort of service would reduce calling in and being transferred to multiple agents before getting to one who is able to address the issue.

**Confirmations:** Some participants suggested the CRA send a confirmation whenever it has received something from a client. The perceived benefits are (a) it provides reassurance that the CRA has received the material or request, thereby removing any need to phone the CRA to find out if it was received, and (b) it is proof that the CRA received the material, in the event such proof is needed at a later time. Note that this capability is included in the new design for *Mail*, and the example *Mail* page shown later to participants included a confirmation email.

**Change of address:** Several participants suggested that a user be able to do a change of address in the communication hub. A few said that in the past it was possible to do this online, but that is no longer the case, and said that now one has to phone the CRA in order to do a change of address.

**FAQs with personalized answers:** A few participants – with agreement from other participants – suggested the communication hub have some sort of short list of common questions (e.g. “top three questions”) from individuals or businesses that involve getting personalized information from the CRA, and the answers shown would contain the personalized information of the user. Examples mentioned included:

- Individuals: RRSP contribution room; Home Buyer’s Program account balance

- Business: If up to date on filings/when next filing is due; If up to date on payments/when next payment is due

**Access to forms:** A few participants suggested the communication hub include access to forms for downloading.

**Suggestions mentioned by one or two participants:**

- If the CRA is making a decision that is affected by missing information from the client, first send a request for the information to the communication hub.
- When the CRA sends a regular email notifying a person that they have mail in a secure portal, provide information about the topic so that the person can assess the importance or urgency of the mail. The participant gave an example of mail pertaining to a PD7A (less important) versus a notice of assessment (more important).
- Provide a location on the communication hub where users can upload files for communication between a client and an authorized representative (AR). The participant said some clients do not have a secure way to send files to the AR, so it would be helpful if they could use the CRA's secure portal for this purpose.
- In *Mail*, allow the user to create folders to store emails. The participant said they are used to categorizing and storing emails in their regular email in folders, and would like the same capability in *Mail*.

**Notifications the CRA attempted to reach you:** One participant suggested this spontaneously, and said this would be helpful given that people may not answer a call from the CRA due to concern it may be a scam call. The moderator probed interest in this idea, and many participants said this would be helpful because of the prevalence of CRA scam calls.

In this context, several participants suggested – to the agreement of others – that the notification should include an option to request a callback from the CRA. One participant further suggested that this include the ability to request a particular date/time range for the callback.

One participant suggested the notification include a number the person could call that would “skip the queue”, and connect them directly to an appropriate agent.

**Updates and reminders:** The moderator asked participants if they would like to receive updates and reminders on changes for the upcoming tax filing season or to the website. Note that this was not suggested spontaneously. The majority said this would be of interest, albeit more so pertaining to tax changes than to changes to the website. Some were not interested because they said they already receive information on upcoming tax changes from other sources.

With regard to the nature of updates on tax changes, several participants had suggestions:

- Use short, simple, plain-language descriptions, with links to the technical details for those interested in the details. This will allow the user to quickly assess relevance.
- Focus on important changes – as one participant put it, they did not want “minor changes clogging up their inbox.”

## Name Suggestions

Participants were asked if they had any suggestions for what to call communications hub.

Overall, most participants did not have suggestions, nor were they particularly engaged by the question.

Suggestions made by one or a few participants included:

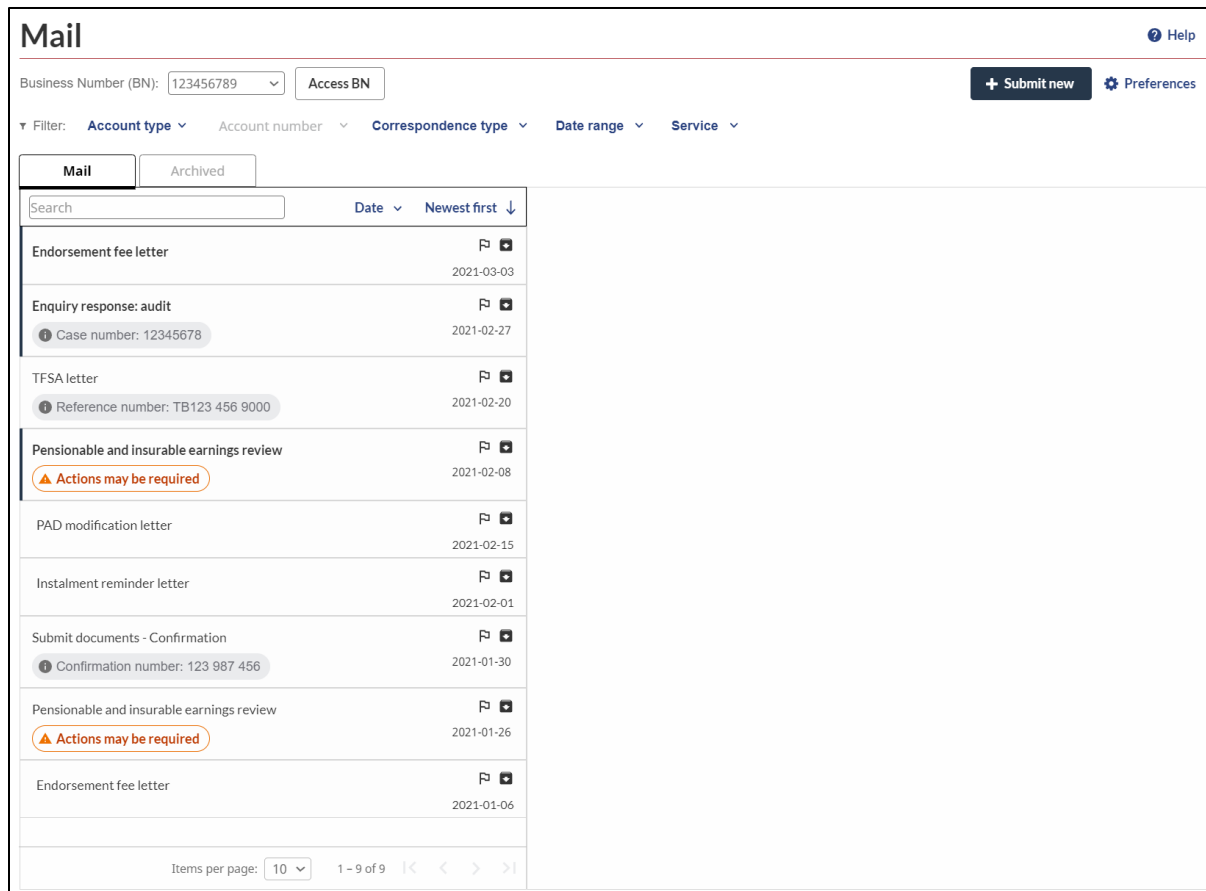
- Communication Hub
- Centralized Message Hub
- Mail
- Correspondence
- My CRA Hub
- Quick Access Communications
- Interaction Centre
- Mes communications (French)
- Communication Centre

The moderator probed reaction to the name, Communication Centre, and most participants agreed this would be a good name.

A few participants commented that whatever name is used, it should convey the possibility of two-way communication, as opposed to just one-way communication from the CRA. “Communication Centre” does this.

## Mail

Participants were shown the proposed design for *Mail*, and asked for their impressions. Following this discussion, the moderator demonstrated the reading pane, mail sorting, message threading, and several features related to sending enquiries or information.



## Overall Reaction

Overall reaction among virtually all participants to the proposed design and features was positive, and often very positive. This included both the overall look of the page, and the various features.

With regard to the overall look of the page, some commented that it is easier to see and know something about each message, compared to what they recall of how mail is displayed currently. There were no suggested changes to the overall graphic design of page.

The proposed *Mail* page has a variety of features that participants commented on. These are organized under the following headings:

- Message labelling
- Reading pane
- Sending enquiries and information
- Filtering and sorting
- Message threading
- Archiving

### Message labelling

Positive perceptions of how messages are labelled included:

- The font size is easy to read.

- The topic descriptions are informative.
- The label includes, where relevant, a case number, reference number or confirmation number.
- There is a flag that the user can turn on to highlight for themselves an important message.

With regard to the flag feature, there were a few suggestions:

- A few participants suggested that there be some sort of time stamp indicating when the flag is turned on, so that the user knows how long ago the item was flagged. This would help in managing flagged messages. For example, one participant said a message flagged “a month ago” would get more immediate attention, since the date suggests the item has not been dealt with on a timely basis.
- One participant suggested the flag have more colour options or gradations to distinguish gradations of importance/priority (currently the flag has two states: on/white, and off/red).

One participant suggested – with agreement from the other participants in the session – to include an option to enter a note in the message description box. They said this could be a note about the current status of the matter addressed by the email – for example, “waiting for client to submit documents”, “this has been responded to”, “this has been dealt with”, “awaiting CRA reply.” The note could be useful for themselves as the AR, or as a note to their client.

## Reading pane

The screenshot displays an email client interface. On the left is a list of messages, and on the right is the content of the selected message.

**Mail List:**

- Endorsement fee letter (2021-03-03)
- Enquiry response: audit (2021-02-27) - Case number: 12345678
- TFSA letter** (2021-02-20) - Reference number: TB123 456 9000
- Pensionable and insurable earnings review (2021-02-08) - **Actions may be required**
- PAD modification letter (2021-02-15)
- Instalment reminder letter (2021-02-01)
- Submit documents - Confirmation (2021-01-30) - Confirmation number: 123 987 456
- Pensionable and insurable earnings review (2021-01-26) - **Actions may be required**
- Endorsement fee letter (2021-01-06)

**TFSA letter details:**

**TFSA letter** (2021-02-20) [Print/Save](#)

**Taxpayer Address:** Compliant RC/RT, ABC CORPORATION LTD, C/O YOUR NAME, PO BOX 1234 STN A, PRINCE ALBERT SK S1A 1A1

**Return Mail Address:** Summerside PE C1N 5Z7

**Business Number:** 12345 6789 RD0002  
**Reference number:** TB123 456 9000

Re: Licence Number 0000-1-234

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet. Proin gravida dolor sit amet lacus accumsan et viverra justo commodo. Proin sodales pulvinar tempor. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Nam fermentum, nulla luctus pharetra vulputate, felis tellus mollis orci, sed rhoncus sapien nunc eget odio. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet. Proin gravida dolor sit amet lacus accumsan et viverra justo commodo.

For more information, phone or write to:  
Saskatoon TSO CR610  
340-3rd Avenue North  
Saskatoon SK S7K 0A8  
Toll free number 1-800-959-5525

Items per page: 10 | 1 - 9 of 9

The moderator demonstrated how the reading pane opens up to the right of the list of messages, such that the list of messages is still visible. The moderator also showed that in the *Preferences* menu it would be possible to change the location of the reading pane – to the left, to the top or to the bottom (note that these options were not functional in the mock-up, so only the existence of the options could be shown).

Virtually all participants liked the way the reading pane displays next to the list of messages. Currently in the secure portals, the reading pane opens in a new window and the list of messages is no longer visible. Many said the advantage of this new way of displaying the reading pane is that it allows easier and faster scanning of different messages, as opposed to going back and forth between a view of the contents of a message and a view of the list of messages. Some commented this is particularly useful if they are not sure which specific email is the one they want, and this allows them to quickly scan different emails. Some also commented that this approach is what they are used to in their regular email program.

Participants were asked which position they would typically assign the reading pane. Almost all said they would use the default setting of the reading pane to the right of the list of messages. A few said they would “play around” with the alternatives, and one said they typically use two screens and so might switch the view depending on how they want to arrange content on the two screens.

Several participants suggested allowing the user to control, through dragging, the size of the reading pane, particularly if they want to allocate more space to the reading pane for ease of reading.

The reading pane includes in the top right corner a control labeled *Print/Save*, which some commented on positively. One participant suggested – to the agreement of a few other participants – that it would be useful to have a “print to PDF” option, for ease of sending a copy of the email to the client (note that *Print/Save* was not functional in the mock-up, so its functionality in this regard could not be demonstrated).

### **Sending enquiries and information**

In the open-ended discussion of suggestions for the communications hub, some participants suggested enhanced capabilities to send online enquiries to the CRA. This was phrased as enquiries in general, and also enquiries about the status of something. The perceived benefit was that this would save time relative to calling the CRA and avoiding spending time on hold or talking to multiple agents to get to the right person. For similar reasons, a few participants suggested adding the ability to reply online to a CRA *Mail* message, to avoid having to phone or to send a reply by regular mail or fax.

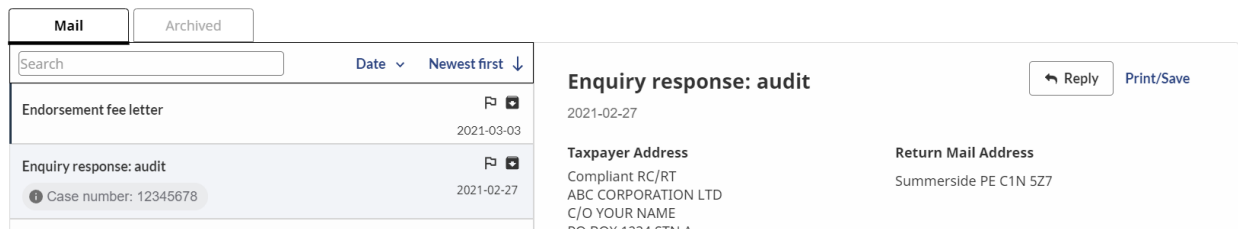
In the latter part of the discussion, the moderator demonstrated three features for sending enquiries and information to the CRA:

- *Reply* function: This was on an example of an audit-related email. Participants were told this could also appear on messages from other CRA programs that have the ability to handle replies.
- Action icon and banner

- *Submit new*

Overall reaction was very positive to these features among virtually all participants. The core perceived benefit of these features is that they are faster and more efficient than phoning, mailing or faxing.

**Reply:** This was perceived very positively by participants. Some specific features commented on positively by several participants included the ability to attach documents, the 3,000 character limit allows for a reasonably long message, and the threaded format which shows the reply and the email being replied to.



The screenshot shows a 'Reply to: Enquiry response: audit' form. It includes a close button (X) in the top right corner. The form contains the following fields and sections:

- Fields marked with an asterisk (\*) are required.**
- Placeholder text: 'Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.'
- \* Subject:** A text input field containing 'RE: Enquiry response: audit'.
- \* Message:** A large text area with the instruction 'Please provide your response in 3000 characters or less'.
- File attachment (optional):** A section with the text 'Allowable file types: .pdf, .doc, .docx, .xls, .xlsx, .rtf, .txt, .jpg, .jpeg, .tiff, .tif, .xps' and a 'Browse' button with the text 'No file chosen'.
- \* Tax period end:** A date picker field.
- Phone number (optional):** A dropdown menu showing '+1' and an input field.
- Extension (optional):** A text input field containing '123'.
- Buttons: 'Submit' and 'Cancel'.

Several participants suggested having the ability to copy or forward the reply to an email address – e.g. to their own email, or to a client’s email. For example, one participant said they would want this because their email set-up is central to how they manage their work. Several participants, however, did not think this would be a good thing because of security issues. They preferred managing any need to distribute an email by using the *Print/Save* feature, and for example forwarding a resulting PDF file.

A few participants said *Reply* is a good idea in principle, but were skeptical that the CRA could actually reply reasonably quickly. They thought that *Reply* would be heavily used, and that as a result CRA response time might be very slow.

**Action icon and banner:** The action icon appears on the message label in the list of messages, and the corresponding email has an action banner which includes a control to take the action being suggested.

TFSA letter	🚩	2021-02-20
Reference number: TB123 456 9000		
Pensionable and insurable earnings review	🚩	2021-02-08
⚠️ Actions may be required		
PAD modification letter	🚩	2021-02-15

**Pensionable and insurable earnings review** Print/Save

2021-03-03

Action may be required: Your payment instalment is overdue. You can pay by interac debit, pre-authorized debit agreement, or in person. Proceed to pay

**Reference number:** 213649857  
**Date Issued:** February 2021

We finished reviewing your 2020 T4 return. We wanted to confirm that you deducted, remitted, and reported enough Canada Pension Plan (CPP) contributions and employment insurance (EI) premiums for your employee. Based on the amounts on the employee T4 slips, we found the following deficiencies:

Tax Year: 2020  
 Case number: 123456789  
 Reply by: April 01, 2021

Description	Amount
Employee's share of CPP deficiency	\$0.00
Plus: employer's share	\$0.00
CPP deficiency	\$0.00
Employees' share of EI deficiency	\$535.00
Plus: employer's share (employees' share X 1.400 )	\$749.00
EI deficiency	\$1,284.00
<b>Total CPP and EI deficiencies for tax year 2020</b>	<b>\$1,284.00</b>

Participants perceived this functionality very positively. The action icon is perceived to stand out and get attention. It highlights mail that the user should deal with sooner rather than later. It facilitates taking the action being suggested.

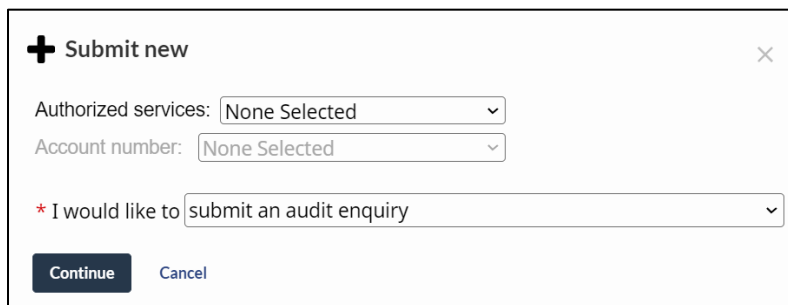


Several participants suggested that the user should have the ability to remove the action icon once the item has been dealt with.

With regard to the specific example shown which is indicating “*your payment is overdue*” and giving a link to make payment: several participants were concerned about a client proceeding to make a payment that is not necessary:

- A few participants said that clicking on *Proceed to pay* should go to a page showing the account balance. Their concern was that the person may already have made a partial payment, thereby reducing the amount actually owing.
- A few participants said it might be that the person does not actually owe anything, but end up “panic paying”, as one participant put it. A suggestion was to include somewhere a way for the user to explain why they are not making a payment.

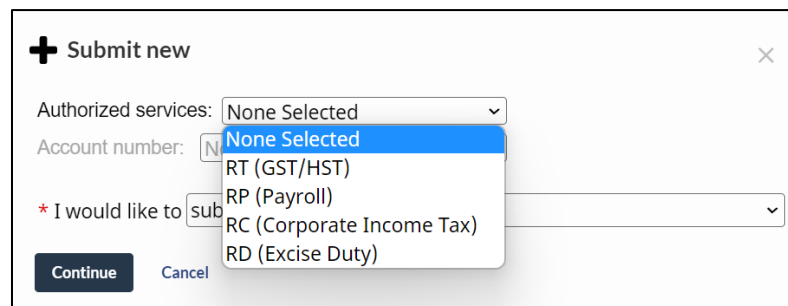
**Submit new:** There was widespread positive reaction to the *Submit new* feature as a way to submit enquiries online. The following shows the *Submit new* form, followed by images showing the drop-down menus:



The screenshot shows the 'Submit new' form with the following fields:

- Authorized services: None Selected
- Account number: None Selected
- \* I would like to: submit an audit enquiry

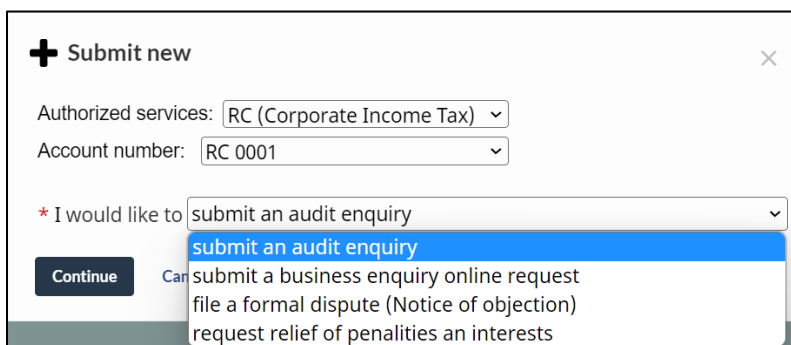
Buttons: Continue, Cancel



The screenshot shows the 'Submit new' form with the 'Account number' dropdown menu open, displaying the following options:

- None Selected
- RT (GST/HST)
- RP (Payroll)
- RC (Corporate Income Tax)
- RD (Excise Duty)

Buttons: Continue, Cancel



The screenshot shows the 'Submit new' form with the 'I would like to' dropdown menu open, displaying the following options:

- submit an audit enquiry
- submit a business enquiry online request
- file a formal dispute (Notice of objection)
- request relief of penalties an interests

Buttons: Continue, Cancel

Participant suggestions included:

- A few participants said they would prefer to handle the enquiry entirely within this dialogue box, rather than being directed to another page on the CRA website. Their concern was that the page might be confusing in terms of what the user is supposed to do in order to pursue their enquiry (note that the mock-up did not allow for showing the pages to which a user might be directed).
- One participant suggested there should be an “other” category in the *I would like to* drop-down menu, that would then allow the user to enter a type of enquiry that is not in the pre-coded list of options.

As with the *Reply* feature, a few participants said that while *Submit new* feature is good, they were concerned that it would be so heavily used that the CRA would have difficulty managing the volume of requests.

### **Mail filtering and sorting**

Some participants commented positively on the filtering and sorting capabilities in the controls above the list of messages. Comments included:

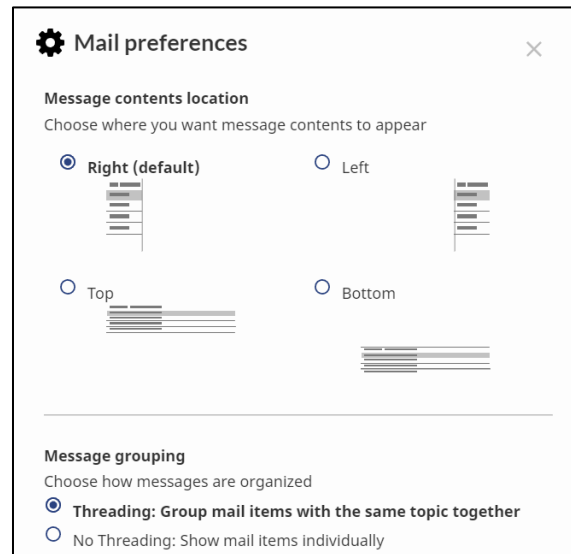
- It looks like there are more filtering and sorting capabilities than there are currently.
- The *Search* function will be very helpful for finding things quickly.

The following are participant suggestions for additional filtering capabilities:

- *Date range* filter:
  - A few participants suggested allowing the ability to select multiple years (note that on the mock-up, only one year can be selected at a time). For example, one said they would like to be able to select *Notices* using the *Correspondence type* filter, and then select multiple years in order to see all these notices in one place.
  - One participant suggested providing the ability to input a customized date range.
- Some participants suggested adding a filter to select items requiring action. This would include mail with the action icon. One participant phrased this more broadly, saying it should apply to any items “you have to respond to.”
- Several participants suggested adding a filter to select unread messages.
- Several participants suggested adding a filter for items the user has flagged. One participant commented they would combine this with sorting by date, in order to help them prioritize what actions to take.

With regard to mail sorting, one of the available sorting dimensions is referred to as *Status*. Several participants said it is unclear what this means. As one participant put it, “status is good in principle, but it doesn’t tell us anything.” They wanted to know what the status categories are on which the mail would be sorted, and it was suggested the site needs to provide a definition of “status.” One participant named several possible categories: action required, open/pending versus closed/dismissed, read versus unread. This participant also suggested allowing the user to assign a status to an email, such as the ones they mentioned, and then sort on that customized basis.

## Message threading



The moderator demonstrated message threading by showing the option to select message threading in the *Preferences* menu, and then showing an example of a threaded message (a message thread with the newer message at the top, followed by the next older message in the thread).

Participants liked that the option is available, and in the open-ended discussion of the communication hub some had suggested adding this capability – with audit mentioned as an example. That said, participants were split in terms of whether and how they personally would use message threading:

- Some said they would not choose threading. They find it easier to find specific emails when each email is by itself, and that it can be difficult to find an email when it is embedded in a threaded string of emails.
- Some said they would choose threading. They like that related emails are together and therefore it is easier to see what has been going on with respect to a particular matter, compared to finding individual emails. One participant also commented that with threading, a user can be easily reminded of an earlier communication they may have forgotten.
- Some said they would switch back and forth between non-threaded and threaded. It appeared their default setting would be non-threaded, but that for specific types of communication – audit was mentioned as an example – they would turn on threading.

Some participants said it is unclear exactly what the basis is for threading, and that this needs to be clarified. In the mock-up, the statement is that threading groups together mail items “with the same topic.” The issue is that the word “topic” is perceived to be ambiguous. The concern was that “topic” might be so broadly defined – e.g. the “generic” subject lines in the list of messages, such as “TFSA letter” – that mail items with no direct relationship to each other could end up being threaded together. This would be confusing, and make it harder to find emails of interest. Some suggested that threading should be done based on an assigned number – i.e. case number or

reference number. One participant – with the agreement of several other participants – said they would like to be able to choose on what basis messages are threaded.

## **Archiving**

Some participants noticed the *Archived* tab at the top of the list of messages, and commented that this would be useful. It was perceived as a way to “clean” the mail list, removing items that no longer require attention.

One participant commented that they were uncomfortable with this feature in a context where multiple people are accessing the mail, whether that other person be a “junior” in the tax firm, or a client. The concern was someone else may archive something that the tax professional would not have wanted archived. The participant said they would not normally be checking archived messages, and so might end up missing an important message.

One participant suggested that in conjunction with using *Search*, it would be convenient to be able to archive a group of related messages all at once, rather than archiving each one individually.

Several participants suggested there should be a capability to delete messages – for example, “really old stuff” in the Archived tab. This led to a few participants raising a question as to whether the CRA automatically deletes messages after a period of time. One participant suggested that in a context where messages can be deleted and multiple users access a mail account, a notification first be posted so that other users can choose not to proceed with deletion.

## **Other participant suggestions**

- A few participants suggested that accessibility features be added to the *Preferences* menu, and in particular mentioned the option to switch to “high contrast” – i.e. white text on a black background.
- The *Mail* list includes a drop-down menu for *Items per page* that ranges from 10 to 25. One participant suggested adding an option for 50 and 100, as they preferred scrolling to viewing separate lists.

# Appendix A – Methodology

## Number and Location of Qualitative Sessions

Five two-hour online focus groups were conducted between November 3 and 15, 2022, with one group in each of the following regions: Atlantic, Quebec, Ontario, Prairies and Pacific. The Atlantic, Ontario, Prairies, and Pacific region focus groups were conducted in English, and the Quebec group was conducted in French. There were five to six participants in each focus group, for a total of 28 participants.

The research design included a contingency for conducting up to five online one-hour individual interviews, to be allocated to individuals identified in the normal course of recruiting who are qualified tax intermediaries, but who use adaptive technology to access the secure portals and who as a result may be better served using a one-on-one methodology adapted to their circumstances. No such individuals were identified, and therefore no individual interviews were conducted.

## Recruiting and Sample Sources

Recruiting for all sessions was done by Synchro Research. The sample source was Synchro's opt-in database of people who have indicated an interest and willingness to be contacted for possible inclusion in a research study.

## Participant Honoraria

The honorarium for all participants was \$225.

## Qualified Participants

For all focus groups, the qualified participant was a tax intermediary professional who acts as a representative for multiple clients on tax matters. Requirements included:

- Acts as a representative for small businesses (defined as less than 100 employees) and/or individuals
- Works at a small/medium sized firm (defined as 1 to 99 employees)
- Uses the CRA's secure portals several times per week, either on average during the year or during tax filing season

The following were additional requirements:

- Able to participate in an online session
- Had not participated in a qualitative session in the past six months, and had not attended five or more qualitative sessions in the past five years

The following is information about the profile of participants:

- Type of clients: All participants (28) had business clients, and most (26) had individual clients
- Size of participant's firm in terms of number of employees:

<b>Number of employees in a participant's firm</b>	<b>Number of participants</b>
1	7
2 to 4	11
5 to 19	5
20-99	5
<b>Total</b>	<b>28</b>

- Frequency of use of CRA secure portals: Of the 28 participants, 20 qualified based on average usage of at least 2 to 3 times per week during the year, and the remaining 8 qualified based on average usage of at least 2 to 3 times per week during tax filing season
- Urban/Rural: Of the 28 participants, 22 were from urban locations, and the remaining 6 were from smaller communities

## Appendix B – Screener

### Tax Intermediaries and the CRA’s Secure Portals

Hello/Bonjour, I'm \_\_\_\_\_ of Synchro Research, a public opinion and marketing research company. First off, let me assure you that we are not trying to sell you anything. We are organizing a focus group research project on behalf of the Government of Canada, and specifically for the Canada Revenue Agency. The focus group is with professionals who provide tax or payroll-related services to businesses and/or individuals. The purpose of the research is to get input on the CRA’s online websites that tax or payroll professionals use on behalf of clients.

May I please speak with an individual in your company who provides tax or payroll-related services directly to either businesses or individuals?

#### When connected, repeat introduction if needed

I’d like to ask you some questions to see if you would be interested in possibly taking part in this study. This will take about 5 or 6 minutes.

May I continue?

- Yes            1
- No            2    **Thank and end the interview**

1a) In what province or territory is your office located? **(do not read list)**

<b>Pacific region</b>	B.C.	1	<b>Quotas: At least 2 Alberta, 1 Saskatchewan, 1 Manitoba</b>	
	Yukon	2		
<b>Prairies region</b>	Alberta	3		
	Saskatchewan	4		
	Manitoba	5		
	Northwest Territories	6		
<b>Ontario region</b>	Ontario	7		
	Nunavut	8		
<b>Quebec region</b>	Quebec	9		
<b>Atlantic region</b>	New Brunswick	10		<b>Quotas: At least 1 from 3 out of the 4 Atlantic provinces</b>
	Nova Scotia	11		
	P.E.I.	12		
	Newfoundland & Labrador	13		

1b) **[Determination of preferred language and whether or not belongs to an OLMC (Official Language Minority Community)]**

**[If in Quebec :]** Préférez-vous continuer en français ou en anglais? Would you prefer that I continue in English or French? **[Si préfère continuer en anglais, passez à l'écran anglais et continuez ou dites ce qui suit puis raccrochez et planifiez le rappel en anglais]** We will call you back to continue this interview in English. Thank you. Goodbye.

**[If prefers to continue in English, qualifies as English OLMC]**

**[If outside Quebec:]** Would you prefer that I continue in English or in French? Préférez-vous continuer en français ou en anglais? ? **[If prefers French, either switch to the French screener and continue, or say the following and then hang up and arrange French-language call-back]** Nous vous rappellerons pour mener cette entrevue de recherche en français. Merci. Au revoir.

**[If prefers to continue in French, qualifies as French OLMC]**

In this project, an individual like yourself would join several others in a two-hour online video session and give ideas and opinions. People who are invited and take part in the group discussion will receive a cash payment honorarium as thanks for their time.

As I mentioned earlier, the purpose of the research is to get input on the CRA's online websites that tax professionals use on behalf of clients. These websites include *Represent a client*, *My business account*, and *My account*. In the discussion session, you would be asked your opinions about these CRA websites and ways in which they might be improved.

Your participation is voluntary and confidential. All information collected, used and/or disclosed will be used for research purposes only and administered per the requirements of the *Privacy Act*. Neither the names of participants nor the companies they work for will be provided to the government. Your decision to take part will not affect any dealings you may have with the Government of Canada and the Canada Revenue Agency.

May I continue?

- |     |                                  |
|-----|----------------------------------|
| Yes | 1                                |
| No  | 2 <b>Thank and end interview</b> |

I need to ask you some questions to see if you fit the profile of the type of people we are looking for in this research.

**Note to recruiter: When terminating a call because of their profile 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 at this time.***

2) What is your position in the company?

---

**If an administrative assistant/secretary, ask to speak with someone who provides tax advice or tax preparation services directly to individual or business tax filers**

3a) For purposes of accessing client information on CRA websites, are you an authorized representative of any small business clients?

- |     |   |
|-----|---|
| Yes | 1 |
| No  | 2 |



3b) For purposes of accessing client information on CRA websites, are you an authorized representative of any individual taxpayer clients?

Yes	1
No	2

If “no” both Q.3a & Q.3b, thank and end interview

**Monitor quotas: In each group, at least 3 who represent business clients, and at least 3 who represent individual clients. If a person represents both types, they count towards both quotas.**

4) [If “yes to Q.3a, ask:] Thinking of the business clients for whom you are an authorized representative, do you have any business clients with ... (read list)

	Yes	No
Less than 100 employees	1	2
100 or more employees	1	2

If “no” to both “Less than 100 employees” and Q.3b, thank and end interview

5) Thinking of your own business, about how many employees does your business have including yourself and any full-time or permanent part-time employees? (Do not read)

1 (sole practitioner)	1	
2 –4 employees	2	
5 – 19 employees	3	
20 – 49 employees	4	
50 – 99 employees	5	
100 or more employees	9	<b>Thank and end interview</b>

6) [If “yes” to Q. 3a, ask:] Thinking of the business clients for whom you are an authorized representative, which of the following services do you provide to these clients? (read list)

	Yes	No
Payroll-related services	1	2
Tax-related services	1	2
Bookkeeping services	1	2

7) As you know, an authorized representative uses the CRA website called *Represent a client* to get access to a client’s information on either *My business account* for business clients, or *My account* for individual clients.

a) On average, about how often do you use any of these CRA websites? Would you say ... (read list)

A few times a month or less often	1
-----------------------------------	---

- |                           |   |                             |
|---------------------------|---|-----------------------------|
| Once a week               | 2 |                             |
| Two to three times a week | 3 | <b>If 3 or 4, go to Q.8</b> |
| Four or more time a week  | 4 |                             |

**[If Code 1 or 2 at Q.7a, AND “no” to Q.3b, thank and end interview]**

- b) **[If Code 1 or 2 at Q.7a, AND “yes” to Q.3b, ask:]** On average, about how often do you use any of these CRA websites on behalf of individual clients during tax-filing season? Would you say ... **(read list)**

- |                                   |   |
|-----------------------------------|---|
| A few times a month or less often | 1 |
| Once a week                       | 2 |
| Two to three times a week         | 3 |
| Four or more time a week          | 4 |

**[If Code 1 or 2 at Q.7b, thank and end interview]**

- 8) You mentioned that your office is in **[province or territory from Q.1a]**. In what city or town is your office located?

---

**Monitor quotas:**

***Pacific region:***

- Maximum of five from Vancouver/Victoria areas
- At least one participant from a rural/remote location, which will be operationally defined as: Northern BC (such as Prince George, Prince Rupert, Fort St. John, Chetwynd, Smithers, Fort Nelson, etc.); any place in the Territories

***Prairies region:***

- At least two from Alberta, 1 from Saskatchewan, 1 from Manitoba
- At least one participant from a rural/remote location, which will be operationally defined as: Northern Manitoba (such as Churchill, Flin Flon, Gillam, Grand Rapids); Northern Saskatchewan (such as Prince Albert, Meadow Lake, La Ronge, etc.); Northern Alberta (such as Slave Lake, Grande Prairie, High Prairie, Cold Lake, High Level, Fort McMurray, etc.); any place in the Territories

***Ontario region:***

- Maximum of five from the GTA
- At least one participant from a rural/remote location, which will be operationally defined as: Northern Ontario e.g. Kenora, Timmins, Sault Ste. Marie, Dryden, Elliot Lake, etc.

***Quebec region:***

- Maximum of five from Montreal
- At least one participant from a rural/remote location, which will be operationally defined as an area north of the Montreal, Quebec City, Gatineau regions

***Atlantic region:***

- At least one recruit from at least three out of the four Atlantic provinces

- At least one participant from a rural/remote location, which will be operationally defined as follows: Labrador/NL outside the Avalon Peninsula; NS Cape Breton; Southwest Nova (southern parts of NS); northern NB (Campbelton, Bathurst, Caraquet, Miramichi, etc.)

9a) Sometimes people with a disability use adaptive technology or devices to browse websites. When you use the CRA websites in your capacity as an authorized representative, do you need to use any adaptive technology or devices to use these websites?

Yes	1	<b>Qualifies for individual interview; Ask Q.9b</b>
No	1	<b>Go to Q.10</b>
Prefer not to say		

9b) What type of adaptive technology or device do you use to access the CRA websites?

---

Thank you. I'd like to find out if you would be interested in participating in an online individual interview on your opinions about using the CRA websites.

10) The discussion session for this project will be conducted online using a webcam, and it will require the use of a laptop, desktop computer or computer tablet connected to high speed internet. Note that you cannot use a smartphone to participate in the online session.

a) Do you have access to high speed internet that you can use for the online discussion session?

- Yes 1
- No 2

b) Do you have access to a laptop, desktop computer or computer tablet to take part in the online discussion session?

Yes, laptop or desktop	1	<b>Go to Q.10d</b>
Yes, computer tablet	2	<b>Ask Q.10c</b>
No	3	<b>Thank and end interview</b>

c) What is the screen size of the computer tablet you will be using to take part in the online discussion session?

Up to 4 inches/small	1	<b>Thank and end interview</b>
5 to 9 inches/medium	2	
At least 10 inches or more/large	3	

d) You will need to be in a place that is quiet and free of distractions for the duration of the online session. Would you able to participate in this type of location?

Yes	1	
No	2	<b>Thank and end interview</b>

If “yes” to Q.10a and “yes to Q.10d, schedule for online group discussion

If “no” to Q.10a and “yes to Q.10d, schedule as an individual online interview

**Instructions for Q.10a-d “Thank and end interview”:** Based on your answers, we are unable to invite you to take part in an online discussion session, as you do not meet the technical requirements. Thank you for your interest in this research.

11a) Have you ever participated in an in-depth research interview or a focus group involving a small group of people where people were asked to discuss different topics?

Yes 1

No 2 **Go to Q.12**

11b) And when was the last time you attended an interview or discussion group?

6 months ago or less 1 **Thank and end interview**

**OR** more than 6 months ago 2

11c) In the past 5 years, how many in-depth research interviews or discussion groups have you attended? Would you say less than 5 in total, or would you say 5 or more?

Less than 5 1

5 or more 2 **Thank and end interview**

12) Thank you. Let me tell you some more about this study to see if you would like to take part.

a) There may be some people from the Canada Revenue Agency who have been involved in this project observing the session. However, they will not take part in the discussion in any way, and they will not be given your name nor the name of your firm. Is this acceptable to you?

Yes 1

No 2 **Thank and end interview**

b) The session will be audio and video recorded. These recordings are used to help with analyzing the findings and writing the report. Neither your name nor the name of the company you work for will appear in the research report, and the recording will not be given to the Canada Revenue Agency. Is this acceptable to you?

Yes 1

No 2 **Thank and end interview**

**Invitation – If qualifies for an individual interview at Q.9b or Q.10d**

Thank you. We would like to invite you to participate in one of our online individual interviews. The session will last one hour, and after you have completed the session you will be paid \$150.

Would you be willing to participate in one of these sessions?

- Yes            1
- No            2    **Thank and end interview**

**Arrange for a daytime session sometime [TBD]-[TBD]. Do not schedule within one hour of any group session.**

We will send instructions for logging in to the online session at least two days in advance. What email address should we use?

---

As I mentioned, you will be paid \$150 after you have finished participating. We can send this to you by Interac e-transfer or by cheque, whichever you prefer. Would you prefer to receive payment by Interac e-transfer or by cheque?

- Interac e-transfer            1
- Cheque                            2

**GO TO Payment Details**

**Invitation – If qualifies for a group session**

**If in Quebec and qualifies as English OLMC at Q.1b, offer session in Ontario or Atlantic**

**If outside Quebec and qualifies as French OLMC at Q.1b, offer session in Quebec**

The session will be held on [insert date], at [insert participant’s local time]. Would you be available to attend?

- Yes            1
- No            2    **Thank and end interview**

Thank you. We would like to invite you to participate in one of our online group discussions. The session will last two hours , and after you have completed the session you will be paid \$225 to thank you for your participation.

For the group discussion we will be using an online software company called ittracks (pronounced eye-tracks). Prior to the group discussion, we will send you a link to the company’s website for a diagnostic check, to make sure that you do not have any problems logging on to the platform for the group discussion itself. Please make sure you do this check before the group. Please let us know if you run in to any problems.

The person leading the discussion will be Rick Robson/Sylvain Laroche of Sage Research, which is a public opinion research company.

Would you be willing to attend?

- Yes            1
- No            2    **Thank and end interview**

<b>City/Date:</b>	<b>Date</b>	<b>Time:</b>
<b>Ontario region</b>	TBD	Ontario time:
<b>Pacific region</b>	TBD	B.C. time:
<b>Prairies region</b>	TBD	Alberta time: Saskatchewan time: Manitoba time:
<b>Atlantic region</b>	TBD	New Brunswick, Nova Scotia, PEI time: Newfoundland time:
<b>Quebec region</b>	TBD	Quebec time:

As I mentioned, you will be paid \$225 after you have finished participating. We can send this to you by Interac e-transfer or by cheque, whichever you prefer. Would you prefer to receive payment by Interac e-transfer or by cheque?

- Interac e-transfer            1
- Cheque                            2

**Payment details**

**Refer to preferred payment method**

**If prefer Interac e-transfer**

What email address would you like the Interac e-transfer sent after you have finished participating in the session?

\_\_\_\_\_

And please confirm the spelling of your name: \_\_\_\_\_

**If prefer cheque**

What mailing address should we use to send you the cheque after you have finished participating in the session?

Street: \_\_\_\_\_

City: \_\_\_\_\_

Province: \_\_\_\_\_

Postal code: \_\_\_\_\_

And please confirm the spelling of your name as it should appear on the cheque

---

**If Individual Interview**

in the event you are unable to attend, let us know as soon as possible so we can find a replacement. Please call us at **[Insert recruiting company phone #]** and ask for **[Insert recruiting company contact name]**. Also note that you may not send someone else in your place if you are unable to attend.

Please also arrive 5 minutes prior to the starting time. **The interview will begin promptly at [TIME].**

**If Group Discussion**

As these are small sessions and with even one person missing, the overall success of the group may be affected, I would ask that you make every effort to attend the group. But, in the event you are unable to attend, let us know as soon as possible so we can find a replacement. Please call us at **[Insert recruiting company phone #]** and ask for **[Insert recruiting company contact name]**. Also note that you may not send someone else in your place if you are unable to attend.

Please also arrive 10 minutes prior to the starting time. **The discussion begins promptly at [TIME].** People who arrive too late to participate in the focus group will not receive the honorarium.

**Closing**

Someone from our office will be calling you back to confirm these arrangements. May I please have your contact information where we can reach you during the evening and during the day?

Name: \_\_\_\_\_

Evening phone: \_\_\_\_\_ Day time phone: \_\_\_\_\_

Email address: \_\_\_\_\_

**Thank you very much!**

Recruited by: \_\_\_\_\_

Confirmed by: \_\_\_\_\_

**Note to recruiter: Should a participant require validation that this is a legitimate research project, please refer them to: [CRA contact information]**

**They can also go to the CRA website below which lists the public opinion research projects the CRA is doing. The name of the project is: *Qualitative research on CRA's secure portals with tax intermediaries*. If they are interested, email them the title and the relevant link:**

English site: <http://canada.ca/por-cra>

French site: <http://canada.ca/arc-por>





# Appendix C – Discussion guide

## Tax Intermediaries and the CRA's Secure Portals

### 1) Introduction (13 minutes)

- a) **Introduce self** (Rick Robson of Sage Research, an independent market research company). This is a research project we're doing on behalf of the Government of Canada, and specifically for the Canada Revenue Agency (CRA).

The CRA has three secure online portals that let people view and manage their tax information. These three secure portals are *My Business Account*, *My Account*, and *Represent a Client*. You will hear me also referring to these as being "websites", but in CRA terminology, they are called "secure portals." In our discussion, you can refer to them as websites or as secure portals, whichever you prefer.

One thing that all of you have in common is that you are tax professionals who work with clients to help them with their tax affairs, including acting as an authorized representative for some clients. So all of you have experience using the CRA's *Represent a Client* website, and using that to access client tax information on either *My Business Account* or *My Account*. And of course you may also use *My Business Account* for your own business, or *My Account* for your personal taxes.

The CRA is planning to make some changes to these websites. I'm going to show you some ideas they have for changes to the websites and ask you what you think of the proposed changes, and for any suggestions you might have. So, for most of the discussion, I'll be showing you web pages and asking for your opinions. I suggest you have some paper and pencil handy so you can jot down notes to yourself about what you think of each of the web pages. That can help you organize your thoughts for what to say in the discussion.

The results of the research will be used by the CRA to improve the new website designs in order to make them easier to use and more useful for people such as yourselves who often use these websites.

#### b) **Review group discussion procedures:**

- Role of moderator
- Role of participants: there are no right or wrong answers; just want everyone to participate and offer your own views; not here to get a consensus but it is of great value to the research to know each of your candid views
- Confidentiality: Participation is voluntary. Neither your name nor the name of your business will appear in the report; the final report will be available through Library and Archives Canada
- Recording: The session is being recorded. The recording is for my use only to help in preparing the report on this research, and will not be provided to the CRA
- Presence of observers from the CRA online: They are not given your full name or the name of your business; they are listening in to observe the moderator and to increase their general understanding of the topics we are discussing tonight
- If you run into any technical problems, let me know and I might be able to help. If I can't help, then our tech support person will help you.

-- Discussion to last 2 hours

- c) **Any questions?**
- d) **Participant self-introductions:** First name only, and the sorts of clients you work with as a tax professional and authorized representative: mainly business client, individual clients or both; if business, any particular focus in terms of size or type of business

## 2) Single Sign-in (37 minutes)

- a) **Describe Single Sign-In concept:** The new Single Sign-In feature will provide access to the CRA's digital services from a **single** authenticated secure portal. Right now, there are separate sign-in pages for *My Business Account*, *My Account*, and *Represent a Client*. With the new Single Sign-in, there will be **one** entry point for all of these online services.

In the case of a tax professional, you would log in to this **one** entry point to access your *Represent a client* account, and any other accounts you may have. For example, you can access your My Account and if you have a *My Business Account* for your own business, you would also have access to that account as well.

This single entry point allows you as a tax professional to access to your Represent a client account, and also any other personal or business accounts you may have with the CRA. Your access to client information as an authorized representative would continue to be done through the Represent a client portal, in the usual way.

- b) **Reaction to concept:** I'll show you what Single Sign-In might look like, but first, what are your reactions to this change to Single Sign-In, compared to how you sign in currently?
  - Perceived benefits
  - Concerns
  - Any suggestions for how single sign-in should work

- c) Show and discuss log-in page:

Introduction: I'm going to show what the Single Sign-In web pages would look like. These are not real web pages. These are mock-ups to show what they might look like. And based on your reactions, the CRA may well make changes to the pages.

Show the page: This is what the Single Sign-In log-in page might look like. **(Display page using screen share)**

What are your reactions to this as the Single Sign-In log-in page?

- Likes/dislikes
- Anything unclear
- Any suggestions

- d) Show *Welcome* page

First describe context: I'll now show you an example of what a user might see once they log in. This particular user is a tax professional like you. I would like you to imagine you are this hypothetical person, and I'll give you a little bit more about the person you're pretending to be. You also have a personal *My Account*. You also have several businesses that you own, such as an accounting firm, and each of these businesses has a *My Business Account*.

As I show you what the user would see please make some notes to yourself about things you like, things you don't like or find unclear, and any suggestions you might have.

**(Show Welcome page using screen share)** This page shows the different accounts that you as this tax professional has. Each of the accounts is clickable.

- When you click on an account, depending on what type of account it is, it'll take you to the corresponding *My Business Account*, *My Account*, or *Represent a Client* page for that particular account.
- **(Demonstrate by clicking on Jones Family Landscaping)** Explain: This is the *My Business Account* for Jones Family Landscaping. This page has a new design that you haven't seen before, but we're not going to talk about that now. I just wanted to show you an example of what happens when you click on an account.
- **(Demonstrate account switching):** From here you can switch accounts in two different ways:
  - 1) One way is to switch to another specific account using the drop-down menu on the top right for Jones Family Landscaping. You can switch not only to your other business accounts, but also to your personal *My Account* and to your *Represent a client* account. (Demonstrate drop-down but do not click on an account)
  - 2) The other way to switch accounts is to go back to the page listing all the user's accounts. You do that by clicking on Canada Revenue Agency in the top left corner. (Click on Canada Revenue Agency, and return to *Welcome* page)
- **(Explain AR link):** One of the accounts is for Nicholas Jones as an Authorized Representative. I won't show it, but if you click on that link, it takes you to the current landing page for *Represent a client* – that is, the page you are used to seeing, where you would enter a client's business number or social insurance number to access their information . **SHOW SCREEN SHOT, THEN RETURN TO WELCOME PAGE**

Again, take a minute or two to make some notes to yourself about things you like, things you don't like or find unclear, and any suggestions you might have, then we'll talk about it as a group.

e) Continue to show *Welcome* page

Having now seen how the new Single Sign-in might work, what are your reactions, both to the Single Sign-in initiative as a whole, and to the pages I've shown you?

- Likes/perceived benefits
- Anything unclear
  - Probe:** Clarity of how the different types of accounts are labeled
- Dislikes/concerns (e.g. participants might mention log-in sharing)
- Ease of use/navigation
- Any suggestions – e.g. for other features, or for design

f) Branding: I have a question about naming related to Single Sign-in. Right now, when you access CRA tax information online, you deal with three separate "doorways", as I'll call them: *My Business Account*, *My Account*, and *Represent a client*. With Single Sign-in, that's all changing,

and now there is just one doorway to access all your CRA accounts. Do have any suggestions for what this new, one doorway, system should be called?

### 3) **Communication Centre (20 minutes)**

The next thing I'd like to talk about is an important change the CRA is considering make to its secure portals,. At this point, this idea is a concept, and I do not have a prototype design that I can show you.

Let me tell you what the concept is.

The CRA plans to implement an online service to become a **centralized hub** for future **communications** and **interactions** with the Agency. Other CRA services will utilize this service to display their **communications** and **interactions** with users. This centralized hub will include the *Mail* section, and improvements to the *Mail* user interface, and it will also include other capabilities for communication and interaction with the CRA.

This centralized hub will include features like mail sorting, filtering, searching, previewing, threading, flagging, archiving, replying to audit enquiries, and confirmations, some of which I will show you shortly.

But that's not all. And that's where you come in. I'd like to hear your suggestions for features the CRA should include in this new centralized hub. When you think about using the CRA's secure portals, and the types of online communication capabilities and interaction you would **ideally** like to have with the CRA, what are your suggestions for how online communication and interaction could be improved? These might be suggestions about the *Mail* user interface to make it more useful to you, or suggestions for other types of enhancements to online communication capabilities and interactions.

**Probes:** Functionality and ease of use of the *Mail* section of the secure portals

Receive updates and reminders on changes for the upcoming tax filing seasons or to the website

Notification(s) that the Agency attempted to reach you; the context – because of scam calls claiming to be from the CRA, sometimes people the CRA is trying to contact don't respond

Any file format types you prefer to utilize on a daily basis that the agency does not allow you to upload currently

Another question I have for you is what this new centralized hub should be called. As I said earlier, the CRA plans to implement an online service to become a **centralized hub** for future **communications** and **interactions** with the Agency. Other CRA services will utilize this service to display their **communications** and **interactions** with users. This centralized hub will include the *Mail* section, and improvements to the *Mail* user interface, and it will also include other capabilities for communication and interaction with the CRA.

And we have been talking about your ideas for other capabilities for communication and interaction this new centralized hub might have.

Thinking about what this new centralized hub in the secure portals and what functionality it might have, what do you think this centralized hub should be called? That is, how should it be labeled on the landing pages of the secure portals, so that it describes what users will be able to do in this section?

Rationale

Likes/dislikes/concerns

Do votes on preference, as appropriate

One possible name the CRA came up with is **Communications Centre**. What do you think of this as a name for the centralized hub for communications and interactions with the CRA?

Likes/dislikes/concerns

Do votes on preference, as appropriate

#### 4) Revised *Mail* page: Introduction and first reaction (8 minutes)

The CRA has some ideas for changes to the *Mail* page. These changes would be part of creating the online centralized hub for communication and interaction with the CRA. For this purpose, I'm going to show you an example of the proposed new *Mail* section in the context of a *My Business Account* page. The reason for using a *My Business Account* page is that it shows the most new features. Where applicable, you would see the same sorts of new features on *Represent a Client* and *My Account*. But for our discussion, I'll use the *My Business Account* page as an example.

The pages I'll show you are just mock-ups, they're not real web pages, and not all of the links work. Also, links to other parts of the website don't work. But enough of the links work so that I can give you a good idea of what a user might see and be able to do.

Again, please make notes to yourself on your reactions, on things you like or don't like, or suggestions you have.

First, let me get you to the proposed new *Mail* section for a *My Business Account*. You'll see that there are examples of several types of mail messages (Use screen share)

In a few minutes, I'll start demonstrating various features of the new *Mail* page, so I'll be clicking on various things. But before I start clicking on things, what is your overall reaction to what you see here? Do you see anything new you particularly like? Anything you don't like or find confusing?

#### 5) *Mail*: Feature demonstrations/discussion (37 minutes)

I'm going to show you some of the new features the CRA is thinking of for the *Mail* section.

##### a) **Ability to view letters and content on the same screen, and Ability to customize/configure mail preferences**

(Note: If participants ask about the *Archive* tab, say: Archive is a feature that allows the user to archive older messages, so that their main mailbox can be less cluttered. However, this feature is not one that I planned to talk about today, but if you have any comments on this feature, let me know.)

I'll start by showing you how a message is displayed when you click on it in the list of messages. **(Click on TFSA letter)**

In the version of *Mail* you've been using, the message opens in a new window and the list of messages is no longer visible. In this new version of *Mail* the message opens in a pane next to the list of messages, so you continue to see the list of messages.

In this new version of *Mail* you can also set your general preferences for where the reading pane is located.

**(Click Preferences; do not click any options; note the options and explain can't show how they look because don't work on the mock-up; note that we'll talk about Message threading later; X-out to close Preferences)**

- What do you think of the change to showing both the list of messages and message contents on the same screen, compared to the way it works now?
- What do you think of the options for the location of the reading pane?

What would be your general preference for the location?

- Do have any suggestions for other ways to customize or configure how mail is displayed?

#### b) **Sorting**

The *Mail* page offers several options for sorting the messages, in addition to sorting by date. **(Click Date to show drop-down; leave on screen while discussing).**

What do you think of these sorting options? Anything unclear? Any suggestions for other sorting criteria?

Another sorting option is Threading. **(Click Preferences and refer to Message Grouping/Threading; to demonstrate a threaded message, click on Threading in the hamburger menu.** As you can see, with threading turned on, messages on the same topic appear together, with the newest message on top.

What do you think of this message threading option?

Which would be your general or default preference: threading or no threading?

Would you switch this setting in some circumstances? If so, what sorts of circumstances?

#### c) **Send enquiries or information to the CRA**

The new *Mail* page has several features that let the user send enquiries or information to the CRA.

**(Demonstrate, then discuss)**

**Reply:** On audit-related messages, there is a Reply button in the email that lets you send enquiry, and optionally an attachment. This feature would also appear on messages from other CRA programs that have the ability to handle replies.

**Demonstrate:**

- **Click Enquiry response: audit**
- **Click Reply, and fill in required fields: Message = "This is my message"; Tax period end = anything**

- Click Submit
- Click Close
- Point out that user’s response is shown together with the original message
- Remove message

**Action icon/Action banner:** On the mock-up, you see a few emails that are flagged with the notice, “Actions may be required”, which is a new feature. And, when you click on one of these messages, the message has a link that takes you to the appropriate place on the CRA website to do the requested action.

**Demonstrate:**

- Click Pensionable and insurable earnings review
- Point out “Proceed to pay” link: this would take you to the payments section of the CRA website [don’t click the link]
- Remove message

**Send account-specific enquiries:** Near the top-right of the page, there is the link called Submit new

**Demonstrate:**

- Click Submit new
- Authorized services: Select RC
- Account number: Drop-down; leave on RC 001
- I would like to: submit a business enquiry online request
- Continue
- Close

I’ve shown you several features that let you send enquiries or information to the CRA: “Reply” in the case of audit-related emails, a flag for items where action may be required and an associated link to go to the relevant part of the CRA website; and the “Submit new” feature that lets you send account-specific enquiries.

What is your overall reaction to these various new options for sending enquiries or information? (As appropriate, follow-up probes for each of the three features)

Likes/dislikes/concerns

Ease of navigation/Ease of use

Suggestions for changing how these features are shown/how they work

Other suggestions for sending or receiving enquiries or information

## 6) (Time permitting – either of the following)

### a) Filtering

Explanation/demonstration: Near the top of the *Mail* page you can see several ways to filter what mail messages are displayed:

- For a user like the one in this example who has multiple businesses and therefore multiple business numbers, they can choose for which business they to see mail (**Click Business number dropdown**)
- There are several ways of filtering which mail messages are displayed. I’ll show you the drop-down menus, but note that on this mock-up the messages don’t actually get filtered in most cases. In real life they would get filtered.

**Demonstrate:**

- **Account Type RT, Account number RT 001, then X-out to clear**
- **Correspondence type drop-down (don't click any choice)**
- **Date range (don't click any choice)**
- **Service – click Audit enquiries to demonstrate actual filtering, then X-out to clear**
- Another feature kind of related to filtering is the addition of the flag icon in each message that lets the user highlight a particular message, to make it stand out in the list. **(Demonstrate)**

What do you think of this new design in terms of what and how you can filter messages to display, compared to what you're used to on CRA websites?

- Likes/Dislikes
- Ease of use
- Suggestions – e.g. other filtering options or capabilities

#### b) **Search**

This new *Mail* page has a search function, and that's another way of filtering which messages are displayed.

**Demonstrate:**

- **Type "TFSA"**
- **Type "Instalment"**
- **Clear the search by deleting search entry**

What do you think of the addition of this search feature? Is it something you would use? If yes – in what circumstances/why; if no – why not

### 7) **Other suggestions for improving CRA enquiries services and support services (3 minutes)**

Do you have any other suggestions for improving CRA enquiries services and support services?

**Probe:** Receive updates on what's new, e.g. on the CRA website, or legislation changes

### 8) **Wrap-up (2 minutes)**

We're just about finished. Is there anything else related to what we've discussed that you want to mention before we wrap up?

The final report for this project will be available to the public and will be posted on the Library and Archives Canada website.

Thank you for coming this evening and giving us your opinions.