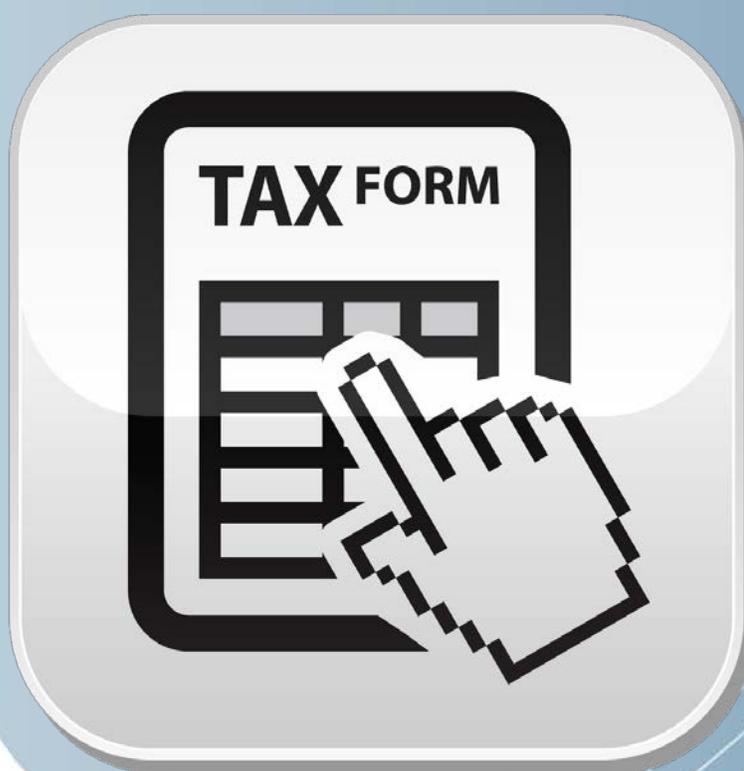


Auto-fill my return:

Simplifying the Process



Canada Revenue
Agency

Agence du revenu
du Canada

Canada

Auto-fill my return: Simplifying the Process

The Canada Revenue Agency is a recognized leader in innovation with the development and introduction of the Auto-fill my return service.

Each year, the CRA receives information returns from employers, federal and provincial governments, and financial institutions such as T4 (Employment Income), T5 (Interest Income), and RRSP contribution amounts as well as other tax-related information such as RRSP contributions, Home Buyers Plan participants, and tuition amounts. The Auto-fill my return service is a secure online service that allows individuals to automatically fill in parts of their income tax and benefit return with this tax information that is on file with the CRA.

In February 2015, Auto-fill my return was introduced to authorized tax preparers to assist them in filing their client's income tax returns. Building on the success of the inaugural launch, the CRA introduced the service in February 2016 to individuals who file their tax returns electronically. The Auto-fill my return service simplifies the way Canadians complete their income tax return as it alleviates the burden of finding the tax slips and then entering them into the software.

Innovative

The service was initiated as a means to electronically deliver tax information directly into tax preparation software, thereby facilitating the accurate completion of tax returns.

As the privacy and security of Canadians continues to be of the utmost importance, it was mandatory to create a service that provided a secure platform by which information could be transferred. The project team worked closely with IT Security to ensure that the service met the established Treasury Board identity assurance requirements and the CRA's IT Security Assessment and Authorization process.



In the development of the Auto-fill my return service, the CRA demonstrated the courage to challenge conventional wisdom and pursue innovative ways to meet Canadians expectations. In collaboration with stakeholders, CRA officials worked tirelessly to leverage their system and determine how they could use information that we had to help Canadians file their income tax return. The team focused on maximizing the immediate and long term potential of this service, while keeping the user's needs at the forefront. The result is a service that revolutionizes the tax filing process in Canada by easing the burden of filing tax returns for Canadians.

Execution

The project team leveraged the long-standing positive working relationship between the CRA and the private sector and invited software developers to participate in the development of this new service. Championed by our software development stakeholders, the project team deployed an application program interface to allow for the transmission of data to tax software. The project team worked side by side with internal and external stakeholders, from the initial design and development stages right through testing and release of the service to share lessons learned, and make the technical requirements a reality. The positive results of these synergies are evident by the creation of a service that was well received by the private industry and tax preparers, and was delivered on time, and on budget.

Relevant

The Government of Canada has identified client-focused service as a priority. The service is a response to the increasing digital expectations of Canadians and its pledge to make it easier for them to comply, by providing end-to-end, modern electronic services that are easy, fast, and secure.

The Agency has come a long way since the days when paper filing was the only option. The importance of this innovative solution in making filing tax returns easier for all Canadians cannot be emphasized enough. The CRA is constantly innovating to reduce the red tape impediment on Canadians and simplify tax obligations and the Auto-fill my return service marks a major change in tax administration in Canada.

Significant

The innovative impact of the Auto-fill my return service goes beyond providing a service enhancement. The Auto-fill my return service delivers tax information that is available with the CRA. For Canadians to have this information readily available, it provides an increased level of certitude that the right information is being used to prepare their tax return. The Auto-fill my return service provides the opportunity to “get it right the first time,” thereby improving service for all Canadians.

This service represents an important addition to the current line of CRA digital services. With its intuitive design, extendibility to other CRA business lines, ease of use and positive take-up rates, it has taken centre stage in modernizing how Canadians interact with the CRA both now and in the future.

In an air of responsible government, the Auto-fill my return service promotes openness and transparency by increasing the availability of information. It also reduces the time required to manually enter the tax related information, requests for reassessments due to missing information slips or potential re-calculation of benefits. This innovative approach is helping to create an enhanced client service.

Effective

The Auto-fill my return service has been embraced by Canadians. In its inaugural year, the Auto-fill my return service successfully delivered tax information for over 931,000 accounts to tax preparers using EFILE software products in 2015. With the expansion of the service to individuals in February 2016, the use of the service has increased dramatically. For the 2015 filing season, the Auto-fill my return service was used to deliver tax information for over 5 M accounts. Drawing on this success, service enhancements were introduced, including additional slips, prior year information and simpler instructions. For the 2017 tax program this year, we have already seen the service used almost 8 M times. The service has also helped increase the take up rate of other electronic services. Since individuals must be fully registered to My Account to use the service, it has contributed to the increase in registration to our secure portals by over 50% last year. The increase in take-up shows that Canadians are clearly seeing the value of this service.

Software developers see the merit and the benefit of the service. The CRA was encouraged by the support the software industry has shown. Today, the Auto-fill my return service is available in over 97% of certified EFILE and NETFILE software products on the market. These products are available on many different platforms, including desktop, smartphone, tablet, Mac, and Windows.

We have been able to adopt this technology for other digital service enhancements, such as Express Notice of Assessment, as well as future developments, such as change of address, and direct deposit. With these enhancement opportunities, the service supports a secure end-to-end enhanced digital interaction for Canadians. The Auto-fill my return service leverages innovation through bold leadership and effective collaboration both within, and between the public and private sectors.



The ability to improve the tax filing experience of Canadians by leveraging technological advancement, uniting stakeholders and building a service that can expand and support the Agency’s vision exemplifies excellence in innovation.