Inland Revenue
Te Tari Taake

Business Transformation

Design Review Workshop
Child Support

Executive Summary

26 – 28 January 2021

Background

The Business Transformation Design Review Workshop ran between 26-28 January 2021, with 31 end users from the CCS-I Families segment, two Technical Specialists, two Community Compliance officers and two representatives from II&S. The purpose of the workshop was to seek their input into the design for START Stage 4 release 2. Over the three days, attendees were broken into groups of 12 to participate in three separate deep-dives. These were structured around the systems and processes associated with:

- ○ Registration and Assessment
- ○ International Collections
- ○ Collection and Payment

In these sessions, attendees received an overview of the technical design, a walk through of the associated business process and were given the opportunity to gain hands-on experience in START.

During each session we captured feedback, questions and thoughts on the following:

- ○ Design (Confirmation, change, enhancements or gaps)
- ○ Testing (Areas identified for key focus)
- ○ Business Processes
- ○ Change

Appendices 1-3 summarise the key themes and findings from each deep-dive.

Key Takeaway Points – in summary

- General approval of the changes across all three areas
- Genuine excitement around the increase in automation
  - quicker processing enabling swifter outcomes, specifically payments to receiving carers
  - allowing more time to focus on the customer including chasing up the more difficult to collect debt
  - particularly pleased to no longer interact with spreadsheets
  - Most frequent comments: "simpler" "easier" "faster" for CSOs
- Some concerns that automation would make the collections process too rigid to the detriment of customers
- Appreciate the benefits of having one database showing all actions on a customer's account, giving greater accuracy with fewer inadvertent errors or impacts down the line
- The processes are seen as straightforward and based on common sense e.g. teams outside International felt they would be able to pick up the work quite easily
- Improvements to myIR will make it an easier/faster process for customers to complete forms and paperwork correctly - leading to fewer phone calls
- "Common sense" also applied to V12's layout and user-friendly interface

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Soundbites *"Absolutely taken aback by the awesome and exciting things ahead"*

- **Soundbites:** (The voice of the attendees…..captured during the days).
  - "Large scale transactional process being automated – this is a big win for us, it allows for more engagement with our customers." (Registration and Assessment)
  - "That there is one database for all actions taken on a customer's account, will prevent officers missing crucial information on changes to a customer's account that can have a roll-on effect to other tax types." (Registration and Assessment)
  - Due to large amount of manual processing, we receive a lot of calls from Receiving Carers asking if their payment is on the schedule received from Australia because we receive the schedule some time before we make payment. In future we will be making the payment as soon as the schedule arrives so these calls will eventually disappear, and everyone was happy with that. (International Collections)
  - With automatic arrears collections the payments to receiving carers will be processed promptly meaning less telephone contacts. (Collections and Payments)

- **Feedback:** (The voice of the attendee…..captured post workshop).
  - "I am so proud of the way everyone has pulled together and contributed to this incredible project. Each person presenting the information in the workshops was genuinely excited. I have already enthusiastically told my team about START R12's common sense layout and user-friendly interface. We're all really looking forward to seeing the changes rolled out.
    I was particularly impressed by the balanced way that ideas were openly considered but with the utmost care around risk management. Everyone was approachable and I was very grateful for a chance to be included in the discussions that will help to shape the future. Thank you!"
  - "I am excited to see the changes come into effect and ironing out the teething issues to provide our customers with consistent, concise information. Well done to the team who have managed to get such a complex tax type to fit the constraints of the "off the shelf" product and their willingness to take our suggestions on board to get it as close to right from the start that we can. I found this workshop very beneficial and wish all of our colleagues could have attended in some way, shape or form to experience our future as well."

APPENDIX

Appendix 1 – Registration and Assessment

- ❑ **Design:**
  - o **Confirmation** – The attendees validate our confidence and ability to deliver and realise the benefits of what we are going to achieve. Key areas:
    - o Simplification of processes, e.g. large scale transactional process being automated.
    - o The Oranga Tamariki portal (online) will have a number of functions that will help Oranga Tamariki staff who will have the ability to manage their clients:
      - Search for a specific children using the OT unique identifier.
      - Register for Child Support.
      - Ability to submit all requests that a Child Support receiving carer can e.g. change of circumstances
      - Extract reports e.g. overpayment report.

  - o **Recommended Changes** - There were no specific call outs here.
  - o **Gaps –** There were no specific call outs here.

- ❑ **Testing:**
  - o The attendees were interested in the testing phases and how we test.
- ❑ **Business Process:**
  - o Integration of Child Support into START will result in Data conversion, e.g. what will be converted across from FIRST to START.
- ❑ **Change:**
  - o Attendees were interested in how we implement any legislative changes.

Appendix 2 − International Collections

- ❑ **Design:**
  - ○ **Confirmation** - Currently the International Collection work is undertaken by a specialist team in Hamilton and we had 6 staff attend from that team. The solution in START largely automates tasks which are currently performed manually using spreadsheets. The International people were extremely positive about the proposed solution. Happy to see the increased automation, they were particularly pleased to no longer interact with spreadsheets. Each of the three sessions was very interactive and the enthusiasm of the attendees was appreciated by the SMEs.
  - ○ **Recommended Changes** - Valid feedback on how information is displayed in some of the cases demonstrated. This has been taken onboard and is being worked through by the SMEs
  - ○ **Gaps -** Indicator for customer living in Australia but Services Australia (SA) is not collecting CS, the customer is paying us directly (we had only designed indicator for when SA is collecting).
    - ○ We were advised that CS are unable to use the Section 17 work item in START and asked if it's being fixed. Action point taken to understand the issue and find a solution – we were not aware of any issues.
    - ○ 10 other minor suggestions regarding the case functionality that the SMEs noted to work through.
- ❑ **Testing:** Outlined the testing process to each session and no one seemed surprised.
- ❑ **Business Process:** Discussion about how much data we will convert – Agreed to take away and discuss with the business as we have not finalised the converted data discussion.
- ❑ **Change:**
  - ○ CCS people not currently doing International Collections (in each session) felt they would be able to pick up this work. This is not just down to the automation but the way it's been designed in START. A lot of complexity has been removed and instead, the process is straight forward and based on common sense.
  - ○ Intercepts and resolution of a pain point: issue of customers going into myIR and changing from services Australia's bank account to their own bank account and then receiving payments incorrectly. With intercepts being used for services Australia the customers bank account will not be changed to services australia's bank account so this issue will be completely resolved.

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Appendix 3 – Collections and Payments

- **Design:**

  - **Confirmation** – Attendees were generally enthusiastic about the design presented to them. Most comment was around the benefits they would see as a result of automation of wage deductions for both ongoing and arrears and the impact that more timely payments to receiving carers would have on both customers and staff. Pain points associated to system limitations in FIRST (write offs of assessment debt) are removed meaning that staff have more options for giving relief to customers.

  - **Recommended Changes** – changing field and decode descriptions to make them more relevant to users and more consistent with the language use in letters and the website. Providing users with a view of the value of debt owed by a liable parent per receiving carer.

  - **Gaps –** there were suggestions that we need to be careful that in automating collection actions we don't become too rigid and deny customers flexibility in line with their circumstances.

- **Testing:**

  - Attendees reinforced the need to pre-test the next Annual Assessment run due for February 2022 as it will be first one we run in START.

- **Business Process:**

  - Data conversion, this mainly centred around the level of conversion of notes information from FIRST which staff see as vital for many collections processes.

- **Change:**

  - Training was of some concern to staff who felt that it could take some time to adjust to the new financials posted by START, particularly in liable parent accounts.