



Service BC

INTERIM AGREEMENT

Between

**SERVICE BC
MINISTRY OF CITIZENS' SERVICES**

and

**REVENUE DIVISION (RD)
MINISTRY OF FINANCE**

REVISED: March 29, 2018

PURPOSE

This Interim Agreement between Service BC (SBC) and Revenue Division (RD) is to formalize the services and methodologies that the partners identified above (hereinafter described as "the partners") will implement for the provision of Tier 1 contact centre support as provided by SBC's service provider for Rural Property Tax (RPT), Property Tax Deferral (PTD), and Home Owner Grants (HOG).

This Interim Agreement has been created as a temporary document until the Ministry of Finance / Service BC Memorandum of Understanding (MOU) describing all services provided by Service BC on behalf of the various branches within the Ministry of Finance has been updated to include the Contact Centre services. This Interim Agreement will be superseded by the new MOU upon execution.

There are certain terms within this Interim Agreement that have been capitalized as they are defined terms in the Master Service Agreement (MSA) with SBC's service provider. In some circumstances there are direct references to the SBC MSA, in order to precisely articulate pre-determined services and/or requirements that were negotiated with the service provider that must be adhered to by all parties who enter into an agreement for SBC Contact Centre services.

RECOGNIZING THAT

Service BC is responsible for the management of the Master Service Agreement and all associated schedules and change orders with MAXIMUS Canada for the provision of Contact Centre services.

Service BC and the Ministry of Finance have an existing agreement effective June 20, 2014. Clause 9.5 of the existing Service BC/Finance agreement provides that projects involving the two parties will be detailed in project documentation.

TIMELINE

December 11, 2017 to March 28, 2018 will be the timeline to complete the activities required to transition the provision of contact centre support from the incumbent service provider to the new Service BC service provider.

Contact centre support for the in-scope RD- services will commence March 29, 2018.

SERVICES

PART 1: Transition Services

The partners will be responsible for assigning appropriate personnel in order to achieve successful implementation of the transition project. Partners will establish clear lines of communication to ensure both parties are aware of timelines, communications, approvals and training.

By December 20, 2017,

- RD will provide any updated policies, procedures and work instructions to SBC for distribution to the SBC service provider so that they can create their own training materials and Knowledge Base Articles (as defined in the MSA).

By December 29, 2017,

- RD will make best efforts to, subject to its confidentiality obligations to the incumbent service provider, provide details of the incumbent service provider's termination assistance plan in connection with the transition of services;
- SBC will facilitate meetings between the SBC service provider and RD in order to allow communications to take place that will allow the SBC service provider to further understand the incumbent service provider's termination assistance plan in connection with the transition of services and also to facilitate collaboration between the SBC service provider and the incumbent service provider for cutover from the incumbent service provider's services to the SBC services, as permitted.

On an ongoing basis RD will, through SBC service delivery team, assist with the resolution of any issues that arise between the SBC service provider and the incumbent service provider and/or RD, as permitted.

A high-level transition plan will be agreed to at the signing of this agreement. This plan will support the development of a detailed transition plan that will be modified as and when required.

PART 2: Operational Services

SBC Service Provider:

The SBC service provider will provide Tier 1 contact centre support to provide citizens with general information about HOG, PTD, and RPT. Tier 1 support includes:

Specific Informational Services

- a) Step-by-step instructions for using the GenTax system for calls regarding RPT and creating a Property Tax Copy Notice for citizens;
- b) Answering the most frequently asked questions citizens ask when enquiring about the RD for the following programs: HOG, RPT and PTD;
- c) Provide citizens with website navigation assistance and guidance to complete online forms and applications available on the website;
- d) Provide detailed information regarding the programs and services available through the website;
- e) Provide support as otherwise requested by RD in its sole discretion for these in-scope programs, and;
- f) Transfer the citizen's request for information to the finance Tier 2 support in accordance with the workflows set forth in the Knowledge Base, together with as many details as possible identified through the notes section of the Revenue Management System - Customer Relations Management (CRM) module.

Where the SBC service provider has received a citizen call pertaining to a RD issue that requires escalation, the SBC service provider will follow the escalation process that has been agreed to between the two parties.

Transactional Services

- g) Generating documents for mailing or emailing to citizens regarding RPT, HOG, and PTD;
- h) Viewing a PTD account in Revenue Management Systems (RMS) - CRM and producing a copy of the citizen's Payout Request Letter; and
- i) Using the Tax Deferral Application (TDA) system to respond to key questions from citizens regarding their tax deferral application when the information is not in CRM.
- j) Assist citizens claiming their Regular or Senior (65+) HOG by inputting specific application information directly into GenTax, between May to July (exact dates will vary from year to year)

The SBC service provider will use the following RD system applications to complete this work on behalf of RD:

- 1. GenTax
- 2. Revenue Management Systems (RMS) (CRM module)
- 3. Tax Deferral Application (TDA)

Role-based access to these systems will be granted to the SBC service provider customer service agents, trainers, supervisors (and other roles as may be agreed) as appropriate by the usual means (e.g. through an IDIR account provided by the province) ^{s.17}

s.17

Revenue Division:

RD will provide SBC with any updated policies, procedures and / or work instructions for distribution to the SBC service provider for the continuous improvement of the Knowledge Base;

RD will, through SBC, respond to questions posed by the SBC service provider for the purposes of improving the accuracy of the Knowledge Base within five business days from the receipt of a question.

RD will provide the specific dates for HOG application by phone support to SBC no later than March 15th of each calendar year.

FINANCIALS

The economic model is described in the table below. This table shows the Transition Fees, specific to the RD in-scope onboarding only.

Operating Year	17/18	18/19	19/20	20/21	21/22	Total
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Total Price	100,465	412,915	423,043	454,239	365,680	1,756,343
Service BC Transition Resource						
Service BC Contract Admin Fee	5,939	24,408	25,006	26,850	21,616	103,819
Total Price	106,404	437,323	448,050	481,090	387,296	1,860,162

Transition Fees	82,742					82,742
Base Fees	23,662	437,323	448,050	481,090	387,296	1,777,420

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#	Milestone	Milestone Deadline	Milestone Completion Criteria	Milestone Payment
1	Approval of detailed transition plan and delivery of transition success report	February 8, 2018	Province provides approval for detailed transition plan and service provider provides mid-project transition success report	s.17
1	Transitioned services go live approval and delivery to the Province of the final transition success report and transition Deficiencies Log	March 15, 2018	Province provides go live approval	
2	Completion of the transition and delivery to the Province of the updated transition deficiencies log	March 29, 2018	Services are being provided by the service provider as of the go live date with no critical deficiencies	

AMENDMENTS

Amendments to the Interim Agreement must be in writing and signed by the signatories of the Interim Agreement or their successors.

TERMINATION

Each partner may terminate the Interim Agreement by giving a minimum of six months prior written notice to the other partner. For this purpose, the notice must be given by a person occupying the position of signatory to the Interim Agreement. The Interim Agreement may also be terminated at any time with the concurrence of the partners expressed by an exchange of letters between the persons occupying the positions of the signatories to the Interim Agreement.

On the termination of the Interim Agreement, all rights and obligations of both partners under the Interim Agreement will cease to be in force except.

Any administrative or financial commitments agreed to prior to termination of this Interim Agreement will be in effect up to the agreed upon termination date.

Termination for Convenience Fee

The RD may terminate this Interim Agreement or any service for convenience, for any reason or for no reason, on not less than six months prior written notice to SBC at any time during the term.

s.17

REPORTING

SBC and RD will work together to determine RD's preference for reports received.

As per the MSA, at the request of RD, SBC shall obtain reports or provide information RD requires to meet or support its reporting obligations in connection with the following policies and legislation:

- (a) Office of the Comptroller General reporting obligations as set out in relevant policies standards including:
 - (i) *Financial Administrative Act* (British Columbia), and
 - (ii) *Core Policy Manual* (includes budgeting forecast requirements);
- (b) *Auditor General Act* (British Columbia) reporting obligations as set out in relevant policies standards;
- (c) privacy reporting obligations as set out in related legal, regulatory and policy (e.g., *Freedom of Information and Protection of Privacy Act* (British Columbia)) including:
 - (i) adherence to security standards,
 - (ii) freedom of information reporting requirements;
- (d) CIO policies and standards;
- (e) Risk Management Branch policies and standards;

DISPUTE RESOLUTION

Any unresolved dispute with respect to the Interim Agreement will be referred to the Management Committee formed under the Service Level Agreement between The Ministry of Citizens' Services (formerly the Ministry of Technology, Innovation and Citizens' Services) and The Ministry of Finance. SBC may request the inclusion of additional staff members who are responsible for the management of the MSA as required.

If the issue is unresolved, the dispute will be referred the persons occupying the position of the signatories to the Interim Agreement

CONTACT INFORMATION

Interim Agreement Designated Officials

The primary contacts for questions or concerns related to this Interim Agreement are:

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Peggy Duncan, Director, Service Design & Integration
Service BC, Ministry of Citizens' Services
PHONE: 778 698-2060
Peggy.Duncan@gov.bc.ca

For Revenue Division:

Ann Davies, Executive Director
Revenue Division, Ministry of Finance
PHONE: 778 698-4800
Ann.Davies@gov.bc.ca

Representing Service BC

Director, Service Design & Integration	NAME: Peggy Duncan ADDRESS: E161 – 4000 Seymour Place, PO Box 9412 Stn Prov Govt Victoria BC, V8W 9V1 PHONE: 778 698-2060 EMAIL: peggy.duncan@gov.bc.ca
Manager, Service Design & Integration	NAME: Michael Boreen ADDRESS: E161 – 4000 Seymour Place, PO Box 9412 Stn Prov Govt Victoria BC, V8W 9V1 PHONE: 778 698-2063 EMAIL: michael.boreen@gov.bc.ca
Operational Contact Contract Performance Manager	NAME: Liz Reading ADDRESS: E161 – 4000 Seymour Place, PO Box 9412 Stn Prov Govt Victoria BC, V8W 9V1 PHONE: 250 580-6339 EMAIL: liz.reading@gov.bc.ca

Revenue Division:

Executive Director Property Taxation Branch	NAME: Steven Emery ADDRESS: 4 th Fl – 1802 Douglas St Victoria BC V8T 4K6 PHONE: 778 698-3892 EMAIL: steven.emery@gov.bc.ca
Director	NAME: Kally Khaira

Property Taxation Branch	ADDRESS: 4 th Fl – 1802 Douglas St Victoria BC V8T 4K6 PHONE: 778 698-9536 EMAIL: kally.khaira@gov.bc.ca
Business Support Analyst Property Taxation Branch	NAME: Rick Lambrick ADDRESS: 4 th Fl - 1802 Douglas St Victoria BC V8T 4K6 PHONE: 778 698-3887 EMAIL: rick.lambrick@gov.bc.ca

This Interim Agreement is signed in duplicate, each version being equally authentic.

For the Ministry of Citizens' Services
Service BC

By: Peggy Duncan, Director



For the Ministry of Finance
Revenue Division

By: Ann Davies, Executive Director



Date: April 27, 2018

Date: April 27th, 2018

Appendix 1: Amendment to Interim Agreement

PURPOSE

This amendment to the Interim Agreement between Service BC (SBC) and Revenue Division (RD) is to add Phase 1 information and referral services for the Speculation Tax program (ST) to the existing Tier 1 contact centre support as provided by SBC's service provider.

TIMELINE

October 1, 2018 – December 31, 2018 will be the timeline for the services described in this Amendment.

ADDITIONAL INFORMATIONAL SERVICES

- a) Answer the most frequently asked questions from citizens when enquiring about ST. ST enquiries will come in through a dedicated phone number, to be set up by October 15, 2018 as well as through email.
- b) The SBC service provider will provide hours of service from 7:30am – 5pm (PST) 5 days per week.

FINANCIALS

The economic model for the Speculation Tax program is described in the table below.

SPECULATION TAX					
Province Fiscal year Summary	18/19	19/20	20/21	21/22	Total

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Total Price	19,721	-	-	-	19,721
Service BC Transition Resource	-	-	-	-	-
Service BC Contract Admin Fee	603	-	-	-	603
Total Price	20,325	-	-	-	20,325

Transition Fees	9,665	-	-	-	9,665
Base Fees	10,660	-	-	-	10,660

Assumptions and considerations:

Baseline Response (October 1 2018 to December 31 2018)

- a. s.17
- b. Based on volumes provided by FIN during business hours of 7:30am –5pm (PST) 5 days per week s.17
- c. s.17
- d. s.17
- e. Training for agents for this time period will be managed through updates to the knowledge base and notification of the new program (i.e. no formal training will be developed or provided for this phase).

Amendment Payment Schedule

The table below describes the payment schedule for the Amendment. These fees are due as indicated.


Payment Amount	Due Date
\$6,573.66	October 31, 2018
\$6,573.66	November 30, 2018
\$6,573.66	December 31, 2018

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For the Ministry of Citizens' Services
Service BC
By: Peggy Duncan, Director

For the Ministry of Finance
Revenue Division
By: Ann Davies, Executive Director





Date: September 20, 2018

Date: September 27, 2018



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Revenue Division:

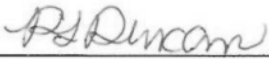
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Director	NAME: Kally Khaira

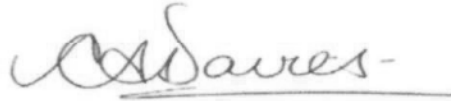
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Revenue Division
By: Ann Davies, Executive Director





Date: April 27, 2018

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From: [Clarke, Treana FIN:EX](#)
To: [Mann, Dawn FIN:EX](#)
Cc: [Lovell, Claire FIN:EX](#)
Subject: Re: Request: Speculation Tax Implementation
Date: July 18, 2018 10:08:07 PM

Hi Dawn,

s.22 we can connect to discuss then. Claire is working on a new agreement with Service BC, which intends to include the call centre as well as the front counter service.

Claire, can you schedule some time for the three of us to meet s.22 ?

Thanks,
Treana

Sent from my BlackBerry 10 smartphone on the TELUS network.

From: Mann, Dawn FIN:EX
Sent: Wednesday, July 18, 2018 12:00 PM
To: Clarke, Treana FIN:EX
Subject: Request: Speculation Tax Implementation

Good morning Treana,
I will be leading the onboarding of Tier One call centre support to the SBC Contact Centre for the new Speculation Tax implementation. Steven Emery would like to have you kept in the loop on this project and asked that I connect to see if you can put together a PIA for the new program and if we can amend the Master Agreement to reflect any changes moving forward.
Let me know what I can do to support this and I will act as a conduit for information for you.
Thanks in advance,

Dawn Mann

Manager, Divisional Projects
Public Information and Corporate Services Branch
Ministry of Finance | Revenue Division
Tel: 250.356.6250 | Cell: 250.882.4583
Website: [Revenue Division Website](#)



Where ideas work



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On an ongoing basis RD will, through SBC service delivery team, assist with the resolution of any issues that arise between the SBC service provider and the incumbent service provider and/or RD, as permitted.

A high-level transition plan will be agreed to at the signing of this agreement. This plan will support the development of a detailed transition plan that will be modified as and when required.

PART 2: Operational Services

SBC Service Provider:

The SBC service provider will provide Tier 1 contact centre support to provide citizens with general information about HOG, PTD, and RPT. Tier 1 support includes:

Specific Informational Services

- a) Step-by-step instructions for using the GenTax system for calls regarding RPT and creating a Property Tax Copy Notice for citizens;
- b) Answering the most frequently asked questions citizens ask when enquiring about the RD for the following programs: HOG, RPT and PTD;
- c) Provide citizens with website navigation assistance and guidance to complete online forms and applications available on the website;
- d) Provide detailed information regarding the programs and services available through the website;
- e) Provide support as otherwise requested by RD in its sole discretion for these in-scope programs, and;
- f) Transfer the citizen's request for information to the finance Tier 2 support in accordance with the workflows set forth in the Knowledge Base, together with as many details as possible identified through the notes section of the Revenue Management System - Customer Relations Management (CRM) module.

Where the SBC service provider has received a citizen call pertaining to a RD issue that requires escalation, the SBC service provider will follow the escalation process that has been agreed to between the two parties.

Transactional Services

- g) Generating documents for mailing or emailing to citizens regarding RPT, HOG, and PTD;
- h) Viewing a PTD account in Revenue Management Systems (RMS) - CRM and producing a copy of the citizen's Payout Request Letter; and
- i) Using the Tax Deferral Application (TDA) system to respond to key questions from citizens regarding their tax deferral application when the information is not in CRM.
- j) Assist citizens claiming their Regular or Senior (65+) HOG by inputting specific application information directly into GenTax, between May to July (exact dates will vary from year to year)

The SBC service provider will use the following RD system applications to complete this work on behalf of RD:

- 1. GenTax
- 2. Revenue Management Systems (RMS) (CRM module)
- 3. Tax Deferral Application (TDA)

Role-based access to these systems will be granted to the SBC service provider customer service agents, trainers, supervisors (and other roles as may be agreed) as appropriate by the usual means (e.g. through an IDIR account provided by the province)^{s.17}

s.17

Revenue Division:

RD will provide SBC with any updated policies, procedures and / or work instructions for distribution to the SBC service provider for the continuous improvement of the Knowledge Base;

RD will, through SBC, respond to questions posed by the SBC service provider for the purposes of improving the accuracy of the Knowledge Base within five business days from the receipt of a question.

RD will provide the specific dates for HOG application by phone support to SBC no later than March 15th of each calendar year.

FINANCIALS

The economic model is described in the table below. This table shows the Transition Fees, specific to the RD in-scope onboarding only.

Operating Year	17/18	18/19	19/20	20/21	21/22	Total
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s.17

Total Price	100,465	412,915	423,043	454,239	365,680	1,756,343
Service BC Transition Resource						
Service BC Contract Admin Fee	5,939	24,408	25,006	26,850	21,616	103,819
Total Price	106,404	437,323	448,050	481,090	387,296	1,860,162

Transition Fees	82,742					82,742
Base Fees	23,662	437,323	448,050	481,090	387,296	1,777,420

s.17

#	Milestone	Milestone Deadline	Milestone Completion Criteria	Milestone Payment
1	Approval of detailed transition plan and delivery of transition success report	February 8, 2018	Province provides approval for detailed transition plan and service provider provides mid-project transition success report	s.17
1	Transitioned services go live approval and delivery to the Province of the final transition success report and transition Deficiencies Log	March 15, 2018	Province provides go live approval	
2	Completion of the transition and delivery to the Province of the updated transition deficiencies log	March 29, 2018	Services are being provided by the service provider as of the go live date with no critical deficiencies	

AMENDMENTS

Amendments to the Interim Agreement must be in writing and signed by the signatories of the Interim Agreement or their successors.

TERMINATION

Each partner may terminate the Interim Agreement by giving a minimum of six months prior written notice to the other partner. For this purpose, the notice must be given by a person occupying the position of signatory to the Interim Agreement. The Interim Agreement may also be terminated at any time with the concurrence of the partners expressed by an exchange of letters between the persons occupying the positions of the signatories to the Interim Agreement.

On the termination of the Interim Agreement, all rights and obligations of both partners under the Interim Agreement will cease to be in force except.

Any administrative or financial commitments agreed to prior to termination of this Interim Agreement will be in effect up to the agreed upon termination date.

Termination for Convenience Fee

The RD may terminate this Interim Agreement or any service for convenience, for any reason or for no reason, on not less than six months prior written notice to SBC at any time during the term.

s.17

REPORTING

SBC and RD will work together to determine RD's preference for reports received.

As per the MSA, at the request of RD, SBC shall obtain reports or provide information RD requires to meet or support its reporting obligations in connection with the following policies and legislation:

- (a) Office of the Comptroller General reporting obligations as set out in relevant policies standards including:
 - (i) *Financial Administrative Act* (British Columbia), and
 - (ii) *Core Policy Manual* (includes budgeting forecast requirements);
- (b) *Auditor General Act* (British Columbia) reporting obligations as set out in relevant policies standards;
- (c) privacy reporting obligations as set out in related legal, regulatory and policy (e.g., *Freedom of Information and Protection of Privacy Act* (British Columbia)) including:
 - (i) adherence to security standards,
 - (ii) freedom of information reporting requirements;
- (d) CIO policies and standards;
- (e) Risk Management Branch policies and standards;

DISPUTE RESOLUTION

Any unresolved dispute with respect to the Interim Agreement will be referred to the Management Committee formed under the Service Level Agreement between The Ministry of Citizens' Services (formerly the Ministry of Technology, Innovation and Citizens' Services) and The Ministry of Finance. SBC may request the inclusion of additional staff members who are responsible for the management of the MSA as required.

If the issue is unresolved, the dispute will be referred the persons occupying the position of the signatories to the Interim Agreement

CONTACT INFORMATION

Interim Agreement Designated Officials

The primary contacts for questions or concerns related to this Interim Agreement are:

For Service BC:

Peggy Duncan, Director, Service Design & Integration
Service BC, Ministry of Citizens' Services
PHONE: 778 698-2060
Peggy.Duncan@gov.bc.ca

For Revenue Division:

Ann Davies, Executive Director
Revenue Division, Ministry of Finance
PHONE: 778 698-4800
Ann.Davies@gov.bc.ca

Representing Service BC

Director, Service Design & Integration	NAME: Peggy Duncan ADDRESS: E161 – 4000 Seymour Place, PO Box 9412 Stn Prov Govt Victoria BC, V8W 9V1 PHONE: 778 698-2060 EMAIL: peggy.duncan@gov.bc.ca
Manager, Service Design & Integration	NAME: Michael Boreen ADDRESS: E161 – 4000 Seymour Place, PO Box 9412 Stn Prov Govt Victoria BC, V8W 9V1 PHONE: 778 698-2063 EMAIL: michael.boreen@gov.bc.ca
Operational Contact Contract Performance Manager	NAME: Liz Reading ADDRESS: E161 – 4000 Seymour Place, PO Box 9412 Stn Prov Govt Victoria BC, V8W 9V1 PHONE: 250 580-6339 EMAIL: liz.reading@gov.bc.ca

Revenue Division:

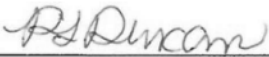
Executive Director Property Taxation Branch	NAME: Steven Emery ADDRESS: 4 th Fl – 1802 Douglas St Victoria BC V8T 4K6 PHONE: 778 698-3892 EMAIL: steven.emery@gov.bc.ca
Director	NAME: Kally Khaira


Property Taxation Branch	ADDRESS: 4 th Fl – 1802 Douglas St Victoria BC V8T 4K6 PHONE: 778 698-9536 EMAIL: kally.khaira@gov.bc.ca
Business Support Analyst Property Taxation Branch	NAME: Rick Lambrick ADDRESS: 4 th Fl - 1802 Douglas St Victoria BC V8T 4K6 PHONE: 778 698-3887 EMAIL: rick.lambrick@gov.bc.ca

This Interim Agreement is signed in duplicate, each version being equally authentic.

For the Ministry of Citizens' Services
Service BC
By: Peggy Duncan, Director

For the Ministry of Finance
Revenue Division
By: Ann Davies, Executive Director





Date: April 27, 2018

Date: April 27th, 2018

Appendix 1: Amendment to Interim Agreement

PURPOSE

This amendment to the Interim Agreement between Service BC (SBC) and Revenue Division (RD) is to add Phase 1 information and referral services for the Speculation Tax program (ST) to the existing Tier 1 contact centre support as provided by SBC's service provider.

TIMELINE

October 1, 2018 – December 31, 2018 will be the timeline for the services described in this Amendment.

ADDITIONAL INFORMATIONAL SERVICES

- a) Answer the most frequently asked questions from citizens when enquiring about ST. ST enquiries will come in through a dedicated phone number, to be set up by October 15, 2018 as well as through email.
- b) The SBC service provider will provide hours of service from 7:30am – 5pm (PST) 5 days per week.

FINANCIALS

The economic model for the Speculation Tax program is described in the table below.

SPECULATION TAX					
Province Fiscal year Summary	18/19	19/20	20/21	21/22	Total

s.17

Total Price	19,721	-	-	-	19,721
Service BC Transition Resource	-	-	-	-	-
Service BC Contract Admin Fee	603	-	-	-	603
Total Price	20,325	-	-	-	20,325

Transition Fees	9,665	-	-	-	9,665
Base Fees	10,660	-	-	-	10,660

Assumptions and considerations:

Baseline Response (October 1 2018 to December 31 2018)

- a. ^{s.17}
- b. Based on volumes provided by FIN during business hours of 7:30am –5pm (PST) 5 days per week ^{s.17}
- c. ^{s.17}
- d.
- e. Training for agents for this time period will be managed through updates to the knowledge base and notification of the new program (i.e. no formal training will be developed or provided for this phase).

Amendment Payment Schedule

The table below describes the payment schedule for the Amendment. These fees are due as indicated.

Payment Amount	Due Date
\$6,573.66	October 31, 2018
\$6,573.66	November 30, 2018
\$6,573.66	December 31, 2018

This Amendment is signed in duplicate, each version being equally authentic.

For the Ministry of Citizens' Services
Service BC
By: Peggy Duncan, Director

For the Ministry of Finance
Revenue Division
By: Ann Davies, Executive Director

Date: _____

Date: _____



INTERIM AGREEMENT

Between

**SERVICE BC
MINISTRY OF CITIZENS' SERVICES**

and

**REVENUE DIVISION (RD)
MINISTRY OF FINANCE**

REVISED: March 29, 2018

PURPOSE

This Interim Agreement between Service BC (SBC) and Revenue Division (RD) is to formalize the services and methodologies that the partners identified above (hereinafter described as "the partners") will implement for the provision of Tier 1 contact centre support as provided by SBC's service provider for Rural Property Tax (RPT), Property Tax Deferment (PTD), and Home Owner Grants (HOG).

This Interim Agreement has been created as a temporary document until the Ministry of Finance / Service BC Memorandum of Understanding (MOU) describing all services provided by Service BC on behalf of the various branches within the Ministry of Finance has been updated to include the Contact Centre services. This Interim Agreement will be superseded by the new MOU upon execution.

There are certain terms within this Interim Agreement that have been capitalized as they are defined terms in the Master Service Agreement (MSA) with SBC's service provider. In some circumstances there are direct references to the SBC MSA, in order to precisely articulate pre-determined services and/or requirements that were negotiated with the service provider that must be adhered to by all parties who enter into an agreement for SBC Contact Centre services.

RECOGNIZING THAT

Service BC is responsible for the management of the Master Service Agreement and all associated schedules and change orders with MAXIMUS Canada for the provision of Contact Centre services.

Service BC and the Ministry of Finance have an existing agreement effective June 20, 2014. Clause 9.5 of the existing Service BC/Finance agreement provides that projects involving the two parties will be detailed in project documentation.

TIMELINE

December 11, 2017 to March 28, 2018 will be the timeline to complete the activities required to transition the provision of contact centre support from the incumbent service provider to the new Service BC service provider.

Contact centre support for the in-scope RD- services will commence March 29, 2018.

SERVICES

PART 1: Transition Services

The partners will be responsible for assigning appropriate personnel in order to achieve successful implementation of the transition project. Partners will establish clear lines of communication to ensure both parties are aware of timelines, communications, approvals and training.

By December 20, 2017,

- RD will provide any updated policies, procedures and work instructions to SBC for distribution to the SBC service provider so that they can create their own training materials and Knowledge Base Articles (as defined in the MSA).

By December 29, 2017,

- RD will make best efforts to, subject to its confidentiality obligations to the incumbent service provider, provide details of the incumbent service provider's termination assistance plan in connection with the transition of services;
- SBC will facilitate meetings between the SBC service provider and RD in order to allow communications to take place that will allow the SBC service provider to further understand the incumbent service provider's termination assistance plan in connection with the transition of services and also to facilitate collaboration between the SBC service provider and the incumbent service provider for cutover from the incumbent service provider's services to the SBC services, as permitted.

On an ongoing basis RD will, through SBC service delivery team, assist with the resolution of any issues that arise between the SBC service provider and the incumbent service provider and/or RD, as permitted.

A high-level transition plan will be agreed to at the signing of this agreement. This plan will support the development of a detailed transition plan that will be modified as and when required.

PART 2: Operational Services

SBC Service Provider:

The SBC service provider will provide Tier 1 contact centre support to provide citizens with general information about HOG, PTD, and RPT. Tier 1 support includes:

Specific Informational Services

- a) Step-by-step instructions for using the GenTax system for calls regarding RPT and creating a Property Tax Copy Notice for citizens;
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Transactional Services

- g) Generating documents for mailing or emailing to citizens regarding RPT, HOG, and PTD;
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s.17

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RD will provide the specific dates for HOG application by phone support to SBC no later than March 15th of each calendar year.

FINANCIALS

The economic model is described in the table below. This table shows the Transition Fees, specific to the RD in-scope onboarding only.

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s.17

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AMENDMENTS

Amendments to the Interim Agreement must be in writing and signed by the signatories of the Interim Agreement or their successors.

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s.17

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- (b) *Auditor General Act* (British Columbia) reporting obligations as set out in relevant policies standards;
- (c) privacy reporting obligations as set out in related legal, regulatory and policy (e.g., *Freedom of Information and Protection of Privacy Act* (British Columbia)) including:
 - (i) adherence to security standards,
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- (d) CIO policies and standards;
- (e) Risk Management Branch policies and standards;

DISPUTE RESOLUTION

Any unresolved dispute with respect to the Interim Agreement will be referred to the Management Committee formed under the Service Level Agreement between The Ministry of Citizens' Services (formerly the Ministry of Technology, Innovation and Citizens' Services) and The Ministry of Finance. SBC may request the inclusion of additional staff members who are responsible for the management of the MSA as required.

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Revenue Division, Ministry of Finance
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Representing Service BC

Director, Service Design & Integration	NAME: Peggy Duncan ADDRESS: E161 – 4000 Seymour Place, PO Box 9412 Stn Prov Govt Victoria BC, V8W 9V1 PHONE: 778 698-2060 EMAIL: peggy.duncan@gov.bc.ca
Manager, Service Design & Integration	NAME: Michael Boreen ADDRESS: E161 – 4000 Seymour Place, PO Box 9412 Stn Prov Govt Victoria BC, V8W 9V1 PHONE: 778 698-2063 EMAIL: michael.boreen@gov.bc.ca
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Revenue Division:

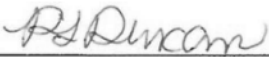
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Director	NAME: Kally Khaira

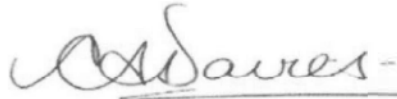
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This Interim Agreement is signed in duplicate, each version being equally authentic.

For the Ministry of Citizens' Services
Service BC
By: Peggy Duncan, Director

For the Ministry of Finance
Revenue Division
By: Ann Davies, Executive Director





Date: April 27, 2018

Date: April 27th, 2018

Appendix 1: Amendment to Interim Agreement

PURPOSE

This amendment to the Interim Agreement between Service BC (SBC) and Revenue Division (RD) is to add Phase 1 information and referral services for the Speculation Tax program (ST) to the existing Tier 1 contact centre support as provided by SBC's service provider.

TIMELINE

October 1, 2018 – December 31, 2018 will be the timeline for the services described in this Amendment.

ADDITIONAL INFORMATIONAL SERVICES

- a) Answer the most frequently asked questions from citizens when enquiring about ST. ST enquiries will come in through a dedicated phone number, to be set up by October 15, 2018 as well as through email.
- b) The SBC service provider will provide hours of service from 7:30am – 5pm (PST) 5 days per week.

FINANCIALS

The economic model for the Speculation Tax program is described in the table below.

SPECULATION TAX					
Province Fiscal year Summary	18/19	19/20	20/21	21/22	Total

s.17

Total Price	19,721	-	-	-	19,721
Service BC Transition Resource	-	-	-	-	-
Service BC Contract Admin Fee	603	-	-	-	603
Total Price	20,325	-	-	-	20,325

Transition Fees	9,665	-	-	-	9,665
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Assumptions and considerations:

Baseline Response (October 1 2018 to December 31 2018)

- a. ^{s.17}
- b. Based on volumes provided by FIN during business hours of 7:30am –5pm (PST) 5 days per week ^{s.17}
- c. ^{s.17}
- d.
- e. Training for agents for this time period will be managed through updates to the knowledge base and notification of the new program (i.e. no formal training will be developed or provided for this phase).

Amendment Payment Schedule

The table below describes the payment schedule for the Amendment. These fees are due as indicated.

Payment Amount	Due Date
\$6,573.66	October 31, 2018
\$6,573.66	November 30, 2018
\$6,573.66	December 31, 2018

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For the Ministry of Citizens' Services
Service BC
By: Peggy Duncan, Director

For the Ministry of Finance
Revenue Division
By: Ann Davies, Executive Director

A handwritten signature in dark ink, appearing to read "Ann Davies", is written over a horizontal line.

Date: _____

Date: September 27, 2018



INTERIM AGREEMENT

Between

**SERVICE BC
MINISTRY OF CITIZENS' SERVICES**

and

**REVENUE DIVISION (RD)
MINISTRY OF FINANCE**

REVISED: March 29, 2018

PURPOSE

This Interim Agreement between Service BC (SBC) and Revenue Division (RD) is to formalize the services and methodologies that the partners identified above (hereinafter described as "the partners") will implement for the provision of Tier 1 contact centre support as provided by SBC's service provider for Rural Property Tax (RPT), Property Tax Deferment (PTD), and Home Owner Grants (HOG).

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Service BC and the Ministry of Finance have an existing agreement effective June 20, 2014. Clause 9.5 of the existing Service BC/Finance agreement provides that projects involving the two parties will be detailed in project documentation.

TIMELINE

December 11, 2017 to March 28, 2018 will be the timeline to complete the activities required to transition the provision of contact centre support from the incumbent service provider to the new Service BC service provider.

Contact centre support for the in-scope RD- services will commence March 29, 2018.

SERVICES

PART 1: Transition Services

The partners will be responsible for assigning appropriate personnel in order to achieve successful implementation of the transition project. Partners will establish clear lines of communication to ensure both parties are aware of timelines, communications, approvals and training.

By December 20, 2017,

- RD will provide any updated policies, procedures and work instructions to SBC for distribution to the SBC service provider so that they can create their own training materials and Knowledge Base Articles (as defined in the MSA).

By December 29, 2017,

- RD will make best efforts to, subject to its confidentiality obligations to the incumbent service provider, provide details of the incumbent service provider's termination assistance plan in connection with the transition of services;
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On an ongoing basis RD will, through SBC service delivery team, assist with the resolution of any issues that arise between the SBC service provider and the incumbent service provider and/or RD, as permitted.

A high-level transition plan will be agreed to at the signing of this agreement. This plan will support the development of a detailed transition plan that will be modified as and when required.

PART 2: Operational Services

SBC Service Provider:

The SBC service provider will provide Tier 1 contact centre support to provide citizens with general information about HOG, PTD, and RPT. Tier 1 support includes:

Specific Informational Services

- a) Step-by-step instructions for using the GenTax system for calls regarding RPT and creating a Property Tax Copy Notice for citizens;
- b) Answering the most frequently asked questions citizens ask when enquiring about the RD for the following programs: HOG, RPT and PTD;
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- d) Provide detailed information regarding the programs and services available through the website;
- e) Provide support as otherwise requested by RD in its sole discretion for these in-scope programs, and;
- f) Transfer the citizen's request for information to the finance Tier 2 support in accordance with the workflows set forth in the Knowledge Base, together with as many details as possible identified through the notes section of the Revenue Management System - Customer Relations Management (CRM) module.

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Transactional Services

- g) Generating documents for mailing or emailing to citizens regarding RPT, HOG, and PTD;
- h) Viewing a PTD account in Revenue Management Systems (RMS) - CRM and producing a copy of the citizen's Payout Request Letter; and
- i) Using the Tax Deferral Application (TDA) system to respond to key questions from citizens regarding their tax deferral application when the information is not in CRM.
- j) Assist citizens claiming their Regular or Senior (65+) HOG by inputting specific application information directly into GenTax, between May to July (exact dates will vary from year to year)

The SBC service provider will use the following RD system applications to complete this work on behalf of RD:

- 1. GenTax
- 2. Revenue Management Systems (RMS) (CRM module)
- 3. Tax Deferral Application (TDA)

Role-based access to these systems will be granted to the SBC service provider customer service agents, trainers, supervisors (and other roles as may be agreed) as appropriate by the usual means (e.g. through an IDIR account provided by the province) ^{s.17}

Revenue Division:

RD will provide SBC with any updated policies, procedures and / or work instructions for distribution to the SBC service provider for the continuous improvement of the Knowledge Base;

RD will, through SBC, respond to questions posed by the SBC service provider for the purposes of improving the accuracy of the Knowledge Base within five business days from the receipt of a question.

RD will provide the specific dates for HOG application by phone support to SBC no later than March 15th of each calendar year.

FINANCIALS

The economic model is described in the table below. This table shows the Transition Fees, specific to the RD in-scope onboarding only.

s.17

Operating Year	17/18	18/19	19/20	20/21	21/22	Total
----------------	-------	-------	-------	-------	-------	-------

Total Price	100,465	412,915	423,043	454,239	365,680	1,756,343
Service BC Transition Resource						
Service BC Contract Admin Fee	5,939	24,408	25,006	26,850	21,616	103,819
Total Price	106,404	437,323	448,050	481,090	387,296	1,860,162

Transition Fees	82,742					82,742
Base Fees	23,662	437,323	448,050	481,090	387,296	1,777,420

s.17

#	Milestone	Milestone Deadline	Milestone Completion Criteria	Milestone Payment
1	Approval of detailed transition plan and delivery of transition success report	February 8, 2018	Province provides approval for detailed transition plan and service provider provides mid-project transition success report	s.17
1	Transitioned services go live approval and delivery to the Province of the final transition success report and transition Deficiencies Log	March 15, 2018	Province provides go live approval	
2	Completion of the transition and delivery to the Province of the updated transition deficiencies log	March 29, 2018	Services are being provided by the service provider as of the go live date with no critical deficiencies	

AMENDMENTS

Amendments to the Interim Agreement must be in writing and signed by the signatories of the Interim Agreement or their successors.

TERMINATION

Each partner may terminate the Interim Agreement by giving a minimum of six months prior written notice to the other partner. For this purpose, the notice must be given by a person occupying the position of signatory to the Interim Agreement. The Interim Agreement may also be terminated at any time with the concurrence of the partners expressed by an exchange of letters between the persons occupying the positions of the signatories to the Interim Agreement.

On the termination of the Interim Agreement, all rights and obligations of both partners under the Interim Agreement will cease to be in force except.

Any administrative or financial commitments agreed to prior to termination of this Interim Agreement will be in effect up to the agreed upon termination date.

Termination for Convenience Fee

The RD may terminate this Interim Agreement or any service for convenience, for any reason or for no reason, on not less than six months prior written notice to SBC at any time during the term.

s.17

REPORTING

SBC and RD will work together to determine RD's preference for reports received.

As per the MSA, at the request of RD, SBC shall obtain reports or provide information RD requires to meet or support its reporting obligations in connection with the following policies and legislation:

- (a) Office of the Comptroller General reporting obligations as set out in relevant policies standards including:
 - (i) *Financial Administrative Act* (British Columbia), and
 - (ii) *Core Policy Manual* (includes budgeting forecast requirements);
- (b) *Auditor General Act* (British Columbia) reporting obligations as set out in relevant policies standards;
- (c) privacy reporting obligations as set out in related legal, regulatory and policy (e.g., *Freedom of Information and Protection of Privacy Act* (British Columbia)) including:
 - (i) adherence to security standards,
 - (ii) freedom of information reporting requirements;
- (d) CIO policies and standards;
- (e) Risk Management Branch policies and standards;

DISPUTE RESOLUTION

Any unresolved dispute with respect to the Interim Agreement will be referred to the Management Committee formed under the Service Level Agreement between The Ministry of Citizens' Services (formerly the Ministry of Technology, Innovation and Citizens' Services) and The Ministry of Finance. SBC may request the inclusion of additional staff members who are responsible for the management of the MSA as required.

If the issue is unresolved, the dispute will be referred the persons occupying the position of the signatories to the Interim Agreement

CONTACT INFORMATION

Interim Agreement Designated Officials

The primary contacts for questions or concerns related to this Interim Agreement are:

For Service BC:

Peggy Duncan, Director, Service Design & Integration
Service BC, Ministry of Citizens' Services
PHONE: 778 698-2060
Peggy.Duncan@gov.bc.ca

For Revenue Division:

Ann Davies, Executive Director
Revenue Division, Ministry of Finance
PHONE: 778 698-4800
Ann.Davies@gov.bc.ca

Representing Service BC

Director, Service Design & Integration	NAME: Peggy Duncan ADDRESS: E161 – 4000 Seymour Place, PO Box 9412 Stn Prov Govt Victoria BC, V8W 9V1 PHONE: 778 698-2060 EMAIL: peggy.duncan@gov.bc.ca
Manager, Service Design & Integration	NAME: Michael Boreen ADDRESS: E161 – 4000 Seymour Place, PO Box 9412 Stn Prov Govt Victoria BC, V8W 9V1 PHONE: 778 698-2063 EMAIL: michael.boreen@gov.bc.ca
Operational Contact Contract Performance Manager	NAME: Liz Reading ADDRESS: E161 – 4000 Seymour Place, PO Box 9412 Stn Prov Govt Victoria BC, V8W 9V1 PHONE: 250 580-6339 EMAIL: liz.reading@gov.bc.ca

Revenue Division:

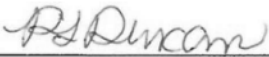
Executive Director Property Taxation Branch	NAME: Steven Emery ADDRESS: 4 th Fl – 1802 Douglas St Victoria BC V8T 4K6 PHONE: 778 698-3892 EMAIL: steven.emery@gov.bc.ca
Director	NAME: Kally Khaira


Property Taxation Branch	ADDRESS: 4 th Fl – 1802 Douglas St Victoria BC V8T 4K6 PHONE: 778 698-9536 EMAIL: kally.khaira@gov.bc.ca
Business Support Analyst Property Taxation Branch	NAME: Rick Lambrick ADDRESS: 4 th Fl - 1802 Douglas St Victoria BC V8T 4K6 PHONE: 778 698-3887 EMAIL: rick.lambrick@gov.bc.ca

This Interim Agreement is signed in duplicate, each version being equally authentic.

For the Ministry of Citizens' Services
Service BC
By: Peggy Duncan, Director

For the Ministry of Finance
Revenue Division
By: Ann Davies, Executive Director





Date: April 27, 2018

Date: April 27th, 2018

Appendix 1: Amendment to Interim Agreement

PURPOSE

This amendment to the Interim Agreement between Service BC (SBC) and Revenue Division (RD) is to add Phase 1 information and referral services for the Speculation Tax program (ST) to the existing Tier 1 contact centre support as provided by SBC's service provider.

TIMELINE

October 1, 2018 – December 31, 2018 will be the timeline for the services described in this Amendment.

ADDITIONAL INFORMATIONAL SERVICES

- a) Answer the most frequently asked questions from citizens when enquiring about ST. ST enquiries will come in through a dedicated phone number, to be set up by October 15, 2018 as well as through email.
- b) The SBC service provider will provide hours of service from 7:30am – 5pm (PST) 5 days per week.

FINANCIALS

The economic model for the Speculation Tax program is described in the table below.

SPECULATION TAX					
Province Fiscal year Summary	18/19	19/20	20/21	21/22	Total

s.17

Total Price	19,721	-	-	-	19,721
Service BC Transition Resource	-	-	-	-	-
Service BC Contract Admin Fee	603	-	-	-	603
Total Price	20,325	-	-	-	20,325

Transition Fees	9,665	-	-	-	9,665
Base Fees	10,660	-	-	-	10,660

Assumptions and considerations:

Baseline Response (October 1 2018 to December 31 2018)

- a. ^{s.17}
- b. Based on volumes provided by FIN during business hours of 7:30am –5pm (PST) 5 days per week ^{s.17}
- c. ^{s.17}
- d
- e. Training for agents for this time period will be managed through updates to the knowledge base and notification of the new program (i.e. no formal training will be developed or provided for this phase).

Amendment Payment Schedule

The table below describes the payment schedule for the Amendment. These fees are due as indicated.

Payment Amount	Due Date
\$6,573.66	October 31, 2018
\$6,573.66	November 30, 2018
\$6,573.66	December 31, 2018

This Amendment is signed in duplicate, each version being equally authentic.

For the Ministry of Citizens' Services
Service BC
By: Peggy Duncan, Director

For the Ministry of Finance
Revenue Division
By: Ann Davies, Executive Director

Date: _____

Date: _____



INTERIM AGREEMENT

Between

**SERVICE BC
MINISTRY OF CITIZENS' SERVICES**

and

**REVENUE DIVISION (RD)
MINISTRY OF FINANCE**

REVISED: March 29, 2018

PURPOSE

This Interim Agreement between Service BC (SBC) and Revenue Division (RD) is to formalize the services and methodologies that the partners identified above (hereinafter described as "the partners") will implement for the provision of Tier 1 contact centre support as provided by SBC's service provider for Rural Property Tax (RPT), Property Tax Deferral (PTD), and Home Owner Grants (HOG).

This Interim Agreement has been created as a temporary document until the Ministry of Finance / Service BC Memorandum of Understanding (MOU) describing all services provided by Service BC on behalf of the various branches within the Ministry of Finance has been updated to include the Contact Centre services. This Interim Agreement will be superseded by the new MOU upon execution.

There are certain terms within this Interim Agreement that have been capitalized as they are defined terms in the Master Service Agreement (MSA) with SBC's service provider. In some circumstances there are direct references to the SBC MSA, in order to precisely articulate pre-determined services and/or requirements that were negotiated with the service provider that must be adhered to by all parties who enter into an agreement for SBC Contact Centre services.

RECOGNIZING THAT

Service BC is responsible for the management of the Master Service Agreement and all associated schedules and change orders with MAXIMUS Canada for the provision of Contact Centre services.

Service BC and the Ministry of Finance have an existing agreement effective June 20, 2014. Clause 9.5 of the existing Service BC/Finance agreement provides that projects involving the two parties will be detailed in project documentation.

TIMELINE

December 11, 2017 to March 28, 2018 will be the timeline to complete the activities required to transition the provision of contact centre support from the incumbent service provider to the new Service BC service provider.

Contact centre support for the in-scope RD- services will commence March 29, 2018.

SERVICES

PART 1: Transition Services

The partners will be responsible for assigning appropriate personnel in order to achieve successful implementation of the transition project. Partners will establish clear lines of communication to ensure both parties are aware of timelines, communications, approvals and training.

By December 20, 2017,

- RD will provide any updated policies, procedures and work instructions to SBC for distribution to the SBC service provider so that they can create their own training materials and Knowledge Base Articles (as defined in the MSA).

By December 29, 2017,

- RD will make best efforts to, subject to its confidentiality obligations to the incumbent service provider, provide details of the incumbent service provider's termination assistance plan in connection with the transition of services;
- SBC will facilitate meetings between the SBC service provider and RD in order to allow communications to take place that will allow the SBC service provider to further understand the incumbent service provider's termination assistance plan in connection with the transition of services and also to facilitate collaboration between the SBC service provider and the incumbent service provider for cutover from the incumbent service provider's services to the SBC services, as permitted.

On an ongoing basis RD will, through SBC service delivery team, assist with the resolution of any issues that arise between the SBC service provider and the incumbent service provider and/or RD, as permitted.

A high-level transition plan will be agreed to at the signing of this agreement. This plan will support the development of a detailed transition plan that will be modified as and when required.

PART 2: Operational Services

SBC Service Provider:

The SBC service provider will provide Tier 1 contact centre support to provide citizens with general information about HOG, PTD, and RPT. Tier 1 support includes:

Specific Informational Services

- a) Step-by-step instructions for using the GenTax system for calls regarding RPT and creating a Property Tax Copy Notice for citizens;
- b) Answering the most frequently asked questions citizens ask when enquiring about the RD for the following programs: HOG, RPT and PTD;
- c) Provide citizens with website navigation assistance and guidance to complete online forms and applications available on the website;
- d) Provide detailed information regarding the programs and services available through the website;
- e) Provide support as otherwise requested by RD in its sole discretion for these in-scope programs, and;
- f) Transfer the citizen's request for information to the finance Tier 2 support in accordance with the workflows set forth in the Knowledge Base, together with as many details as possible identified through the notes section of the Revenue Management System - Customer Relations Management (CRM) module.

Where the SBC service provider has received a citizen call pertaining to a RD issue that requires escalation, the SBC service provider will follow the escalation process that has been agreed to between the two parties.

Transactional Services

- g) Generating documents for mailing or emailing to citizens regarding RPT, HOG, and PTD;
- h) Viewing a PTD account in Revenue Management Systems (RMS) - CRM and producing a copy of the citizen's Payout Request Letter; and
- i) Using the Tax Deferral Application (TDA) system to respond to key questions from citizens regarding their tax deferral application when the information is not in CRM.
- j) Assist citizens claiming their Regular or Senior (65+) HOG by inputting specific application information directly into GenTax, between May to July (exact dates will vary from year to year)

The SBC service provider will use the following RD system applications to complete this work on behalf of RD:

- 1. GenTax
- 2. Revenue Management Systems (RMS) (CRM module)
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Role-based access to these systems will be granted to the SBC service provider customer service agents, trainers, supervisors (and other roles as may be agreed) as appropriate by the usual means (e.g. through an IDIR account provided by the province)^{s.17}

s.17

Revenue Division:

RD will provide SBC with any updated policies, procedures and / or work instructions for distribution to the SBC service provider for the continuous improvement of the Knowledge Base;

RD will, through SBC, respond to questions posed by the SBC service provider for the purposes of improving the accuracy of the Knowledge Base within five business days from the receipt of a question.

RD will provide the specific dates for HOG application by phone support to SBC no later than March 15th of each calendar year.

FINANCIALS

The economic model is described in the table below. This table shows the Transition Fees, specific to the RD in-scope onboarding only.

s.17

Operating Year	17/18	18/19	19/20	20/21	21/22	Total
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Total Price	100,465	412,915	423,043	454,239	365,680	1,756,343
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#	Milestone	Milestone Deadline	Milestone Completion Criteria	Milestone Payment
1	Approval of detailed transition plan and delivery of transition success report	February 8, 2018	Province provides approval for detailed transition plan and service provider provides mid-project transition success report	s.17
1	Transitioned services go live approval and delivery to the Province of the final transition success report and transition Deficiencies Log	March 15, 2018	Province provides go live approval	
2	Completion of the transition and delivery to the Province of the updated transition deficiencies log	March 29, 2018	Services are being provided by the service provider as of the go live date with no critical deficiencies	

AMENDMENTS

Amendments to the Interim Agreement must be in writing and signed by the signatories of the Interim Agreement or their successors.

TERMINATION

Each partner may terminate the Interim Agreement by giving a minimum of six months prior written notice to the other partner. For this purpose, the notice must be given by a person occupying the position of signatory to the Interim Agreement. The Interim Agreement may also be terminated at any time with the concurrence of the partners expressed by an exchange of letters between the persons occupying the positions of the signatories to the Interim Agreement.

On the termination of the Interim Agreement, all rights and obligations of both partners under the Interim Agreement will cease to be in force except:

Any administrative or financial commitments agreed to prior to termination of this Interim Agreement will be in effect up to the agreed upon termination date.

Termination for Convenience Fee

The RD may terminate this Interim Agreement or any service for convenience, for any reason or for no reason, on not less than six months prior written notice to SBC at any time during the term.

s.17

REPORTING

SBC and RD will work together to determine RD's preference for reports received.

As per the MSA, at the request of RD, SBC shall obtain reports or provide information RD requires to meet or support its reporting obligations in connection with the following policies and legislation:

- (a) Office of the Comptroller General reporting obligations as set out in relevant policies standards including:
 - (i) *Financial Administrative Act* (British Columbia), and
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- (b) *Auditor General Act* (British Columbia) reporting obligations as set out in relevant policies standards;
- (c) privacy reporting obligations as set out in related legal, regulatory and policy (e.g., *Freedom of Information and Protection of Privacy Act* (British Columbia)) including:
 - (i) adherence to security standards,
 - (ii) freedom of information reporting requirements;
- (d) CIO policies and standards;
- (e) Risk Management Branch policies and standards;

DISPUTE RESOLUTION

Any unresolved dispute with respect to the Interim Agreement will be referred to the Management Committee formed under the Service Level Agreement between The Ministry of Citizens' Services (formerly the Ministry of Technology, Innovation and Citizens' Services) and The Ministry of Finance. SBC may request the inclusion of additional staff members who are responsible for the management of the MSA as required.

If the issue is unresolved, the dispute will be referred the persons occupying the position of the signatories to the Interim Agreement

CONTACT INFORMATION

Interim Agreement Designated Officials

The primary contacts for questions or concerns related to this Interim Agreement are:

For Service BC:

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Service BC, Ministry of Citizens' Services
PHONE: 778 698-2060
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For Revenue Division:

Ann Davies, Executive Director
Revenue Division, Ministry of Finance
PHONE: 778 698-4800
Ann.Davies@gov.bc.ca

Representing Service BC

Director, Service Design & Integration	NAME: Peggy Duncan ADDRESS: E161 – 4000 Seymour Place, PO Box 9412 Stn Prov Govt Victoria BC, V8W 9V1 PHONE: 778 698-2060 EMAIL: peggy.duncan@gov.bc.ca
Manager, Service Design & Integration	NAME: Michael Boreen ADDRESS: E161 – 4000 Seymour Place, PO Box 9412 Stn Prov Govt Victoria BC, V8W 9V1 PHONE: 778 698-2063 EMAIL: michael.boreen@gov.bc.ca
Operational Contact Contract Performance Manager	NAME: Liz Reading ADDRESS: E161 – 4000 Seymour Place, PO Box 9412 Stn Prov Govt Victoria BC, V8W 9V1 PHONE: 250 580-6339 EMAIL: liz.reading@gov.bc.ca

Revenue Division:

Executive Director Property Taxation Branch	NAME: Steven Emery ADDRESS: 4 th Fl – 1802 Douglas St Victoria BC V8T 4K6 PHONE: 778 698-3892 EMAIL: steven.emery@gov.bc.ca
Director	NAME: Kally Khaira

Property Taxation Branch	ADDRESS: 4 th Fl - 1802 Douglas St. Victoria BC V8T 4K6 PHONE: 778 698-9536 EMAIL: kally.khaira@gov.bc.ca
Business Support Analyst Property Taxation Branch	NAME: Rick Lambrick ADDRESS: 4 th Fl - 1802 Douglas St. Victoria BC V8T 4K6 PHONE: 778 698-3887 EMAIL: rick.lambrick@gov.bc.ca

This Interim Agreement is signed in duplicate, each version being equally authentic.

For the Ministry of Citizens' Services
Service BC
By: Peggy Duncan, Director

For the Ministry of Finance
Revenue Division
By: Ann Davies, Executive Director





Date: April 27, 2018

Date: April 27th, 2018

Appendix 1: Amendment to Interim Agreement

PURPOSE

This amendment to the Interim Agreement between Service BC (SBC) and Revenue Division (RD) is to add Phase 1 information and referral services for the Speculation Tax program (ST) to the existing Tier 1 contact centre support as provided by SBC's service provider.

TIMELINE

October 1, 2018 – December 31, 2018 will be the timeline for the services described in this Amendment.

ADDITIONAL INFORMATIONAL SERVICES

- a) Answer the most frequently asked questions from citizens when enquiring about ST. ST enquiries will come in through a dedicated phone number, to be set up by October 15, 2018 as well as through email.
- b) The SBC service provider will provide hours of service from 7:30am – 5pm (PST) 5 days per week.

FINANCIALS

The economic model for the Speculation Tax program is described in the table below.

SPECULATION TAX					
Province Fiscal Year Summary	18/19	19/20	20/21	21/22	Total

s.17

Total Price	19,721	-	-	-	19,721
Service BC Transition Resource	-	-	-	-	-
Service BC Contract Admin Fee	603	-	-	-	603
Total Price	20,325	-	-	-	20,325
Transition Fees	9,665	-	-	-	9,665
Base Fees	10,660	-	-	-	10,660

Assumptions and considerations:**Baseline Response (October 1, 2018 to December 31, 2018)**

- a. s.17
- b. Based on volumes provided by FIN during business hours of 7:30am –5pm (PST) 5 days per week s.17
- c. s.17
- d.
- e. Training for agents for this time period will be managed through updates to the knowledge base and notification of the new program (i.e. no formal training will be developed or provided for this phase).

Amendment Payment Schedule

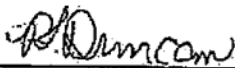
The table below describes the payment schedule for the Amendment. These fees are due as indicated.

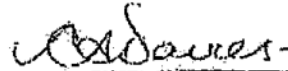
Payment Amount	Due Date
\$6,573.66	October 31, 2018
\$6,573.66	November 30, 2018
\$6,573.66	December 31, 2018

This Amendment is signed in duplicate, each version being equally authentic.

For the Ministry of Citizens' Services
Service BC
By: Peggy Duncan, Director

For the Ministry of Finance
Revenue Division
By: Ann Davies, Executive Director





Date: September 28, 2018

Date: September 27, 2018

Appendix 2: Amendment to Interim Agreement

PURPOSE

This amendment to the Interim Agreement between Service BC (SBC) and Revenue Division (RD) is to add Phase II services (declaration support) for the Speculation and Vacancy Tax program (SVT) to the existing Tier 1 contact centre support as provided by SBC's service provider.

TIMELINE

November 01, 2018 to January 02, 2019 will be the timeline to complete the activities required to transition Phase II SVT services to the contact centre.

Contact centre support for the Phase I SVT informational services will continue from January 2, 2019 and finish January 21, 2019.

Contact centre support for the in-scope Phase II SVT services will commence January 21, 2019 and finish May 31, 2019.

ADDITIONAL INFORMATIONAL SERVICES

- a) Answer the most frequently asked questions from citizens when enquiring about the declaration process for SVT. SVT enquiries will come in through a dedicated phone number.
- b) Provide citizens with website navigation and assistance and guidance to complete online forms and applications available on the website.
- c) Use the external services manager to look up the declaration code, letter ID and account balances for citizens.
- d) The SBC service provider will provide extended hours of service from January 21, 2019 to March 31, 2019. Extended hours will be 8am – 8pm (PST) Monday to Friday and 8am – 5pm (PST) Saturday and Sunday.

ADDITIONAL TRANSACTIONAL SERVICES

- e) Completing the SVT declaration for citizens. Inputting specific information from citizens directly into the eTaxBC declaration application. SVT declaration peaks occur between January and May (exact dates will vary from year to year).
- f) Email or text a declaration confirmation number to citizens.

Where the SBC service provider has received a call pertaining to an SVT issue that requires escalation, the SBC service provider will follow the escalation process that has been agreed to between the two parties.

The economic model for Phase II of the Speculation and Vacancy Tax is described in the table below.

s.17

Assumptions and considerations:

- a. Beginning January 21, the first 100,000 letters will be sent out (consisting mostly of international addresses);
- b. Every business day thereafter, another 100,000 letters will be sent up until February 8 (expectation is that all letters be in Canada Post's care as of February 14);
- c. Overall, 500k letters will be sent each week for the three-week period (accounting for approximately a total of 1.4 to 1.5 million letters)
- d. A true up may be required in June due to the number of assumptions concerning call volumes over this short period and there could be quite material differences in the effect of this if the assumptions change.
- e. Transition costs are November 1 to Operations Go-Live Date of Jan 2, 2019.
- f. Capacity of named agents (ie. head count) has been limited to $5^{s.1}$.
- g. In case of cancellation:

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Transition Milestones

The following are milestones for this transition:

Number	Milestone	Milestone Deadline	Milestone Completion Criteria
1.	Approval of Detailed Transition Plan and delivery of Transition Success Report	29 November, 2018	Province provides Approval for Detailed Transition Plan and Service Provider provides interim Transition Success Report.
2.	Transitioned Services Go Live Approval and delivery to the Province of the final Transition Success Report and Transition Deficiencies Log.	13 December, 2018	Province provides Transitioned Services Go Live Approval
3.	Completion of the Transition and delivery to the Province of the updated Transition Deficiencies Log.	7 January, 2019	Services are being provided by the Service Provider as of the Go Live Date with no critical deficiencies.

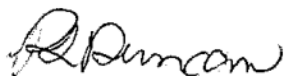
Amendment Payment Schedule

Payment to be made by the Province in five equal payments of \$237,876.00 in the months of January– May 2019. For clarity, while payments are not linked to delivery of individual Milestones, all fees including Transition fees, will only be released on successful delivery of all Milestones.

This Amendment is signed in duplicate, each version being equally authentic.

For the Ministry of Citizens' Services
Service BC
By: Peggy Duncan, Director

For the Ministry of Finance
Revenue Division
By: Ann Davies, Executive Director





Date: November 21, 2018

Date: November 21, 2018



Service BC

INTERIM AGREEMENT

Between

**SERVICE BC
MINISTRY OF CITIZENS' SERVICES**

and

**REVENUE DIVISION (RD)
MINISTRY OF FINANCE**

REVISED: March 29, 2018

PURPOSE

This Interim Agreement between Service BC (SBC) and Revenue Division (RD) is to formalize the services and methodologies that the partners identified above (hereinafter described as "the partners") will implement for the provision of Tier 1 contact centre support as provided by SBC's service provider for Rural Property Tax (RPT), Property Tax Deferment (PTD), and Home Owner Grants (HOG).

This Interim Agreement has been created as a temporary document until the Ministry of Finance / Service BC Memorandum of Understanding (MOU) describing all services provided by Service BC on behalf of the various branches within the Ministry of Finance has been updated to include the Contact Centre services. This Interim Agreement will be superseded by the new MOU upon execution.

There are certain terms within this Interim Agreement that have been capitalized as they are defined terms in the Master Service Agreement (MSA) with SBC's service provider. In some circumstances there are direct references to the SBC MSA, in order to precisely articulate pre-determined services and/or requirements that were negotiated with the service provider that must be adhered to by all parties who enter into an agreement for SBC Contact Centre services.

RECOGNIZING THAT

Service BC is responsible for the management of the Master Service Agreement and all associated schedules and change orders with MAXIMUS Canada for the provision of Contact Centre services.

Service BC and the Ministry of Finance have an existing agreement effective June 20, 2014. Clause 9.5 of the existing Service BC/Finance agreement provides that projects involving the two parties will be detailed in project documentation.

TIMELINE

December 11, 2017 to March 28, 2018 will be the timeline to complete the activities required to transition the provision of contact centre support from the incumbent service provider to the new Service BC service provider.

Contact centre support for the in-scope RD- services will commence March 29, 2018.

SERVICES

PART 1: Transition Services

The partners will be responsible for assigning appropriate personnel in order to achieve successful implementation of the transition project. Partners will establish clear lines of communication to ensure both parties are aware of timelines, communications, approvals and training.

By December 20, 2017,

- RD will provide any updated policies, procedures and work instructions to SBC for distribution to the SBC service provider so that they can create their own training materials and Knowledge Base Articles (as defined in the MSA).

By December 29, 2017,

- RD will make best efforts to, subject to its confidentiality obligations to the incumbent service provider, provide details of the incumbent service provider's termination assistance plan in connection with the transition of services;
- SBC will facilitate meetings between the SBC service provider and RD in order to allow communications to take place that will allow the SBC service provider to further understand the incumbent service provider's termination assistance plan in connection with the transition of services and also to facilitate collaboration between the SBC service provider and the incumbent service provider for cutover from the incumbent service provider's services to the SBC services, as permitted.

On an ongoing basis RD will, through SBC service delivery team, assist with the resolution of any issues that arise between the SBC service provider and the incumbent service provider and/or RD, as permitted.

A high-level transition plan will be agreed to at the signing of this agreement. This plan will support the development of a detailed transition plan that will be modified as and when required.

PART 2: Operational Services

SBC Service Provider:

The SBC service provider will provide Tier 1 contact centre support to provide citizens with general information about HOG, PTD, and RPT. Tier 1 support includes:

Specific Informational Services

- a) Step-by-step instructions for using the GenTax system for calls regarding RPT and creating a Property Tax Copy Notice for citizens;
- b) Answering the most frequently asked questions citizens ask when enquiring about the RD for the following programs: HOG, RPT and PTD;
- c) Provide citizens with website navigation assistance and guidance to complete online forms and applications available on the website;
- d) Provide detailed information regarding the programs and services available through the website;
- e) Provide support as otherwise requested by RD in its sole discretion for these in-scope programs, and;
- f) Transfer the citizen's request for information to the finance Tier 2 support in accordance with the workflows set forth in the Knowledge Base, together with as many details as possible identified through the notes section of the Revenue Management System - Customer Relations Management (CRM) module.

Where the SBC service provider has received a citizen call pertaining to a RD issue that requires escalation, the SBC service provider will follow the escalation process that has been agreed to between the two parties.

Transactional Services

- g) Generating documents for mailing or emailing to citizens regarding RPT, HOG, and PTD;
- h) Viewing a PTD account in Revenue Management Systems (RMS) - CRM and producing a copy of the citizen's Payout Request Letter; and
- i) Using the Tax Deferral Application (TDA) system to respond to key questions from citizens regarding their tax deferral application when the information is not in CRM.
- j) Assist citizens claiming their Regular or Senior (65+) HOG by inputting specific application information directly into GenTax, between May to July (exact dates will vary from year to year)

The SBC service provider will use the following RD system applications to complete this work on behalf of RD:

- 1. GenTax
- 2. Revenue Management Systems (RMS) (CRM module)
- 3. Tax Deferral Application (TDA)

Role-based access to these systems will be granted to the SBC service provider customer service agents, trainers, supervisors (and other roles as may be agreed) as appropriate by the usual means (e.g. through an IDIR account provided by the province)^{s.17}

s.17

Revenue Division:

RD will provide SBC with any updated policies, procedures and / or work instructions for distribution to the SBC service provider for the continuous improvement of the Knowledge Base;

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RD will provide the specific dates for HOG application by phone support to SBC no later than March 15th of each calendar year.

FINANCIALS

The economic model is described in the table below. This table shows the Transition Fees, specific to the RD in-scope onboarding only.

s.17

Operating Year	17/18	18/19	19/20	20/21	21/22	Total
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Total Price	100,465	412,915	423,043	454,239	365,680	1,756,343
Service BC Transition Resource						
Service BC Contract Admin Fee	5,939	24,408	25,006	26,850	21,616	103,819
Total Price	106,404	437,323	448,050	481,090	387,296	1,860,162

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#	Milestone	Milestone Deadline	Milestone Completion Criteria	Milestone Payment
1	Approval of detailed transition plan and delivery of transition success report	February 8, 2018	Province provides approval for detailed transition plan and service provider provides mid-project transition success report	s.17
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AMENDMENTS

Amendments to the Interim Agreement must be in writing and signed by the signatories of the Interim Agreement or their successors.

TERMINATION

Each partner may terminate the Interim Agreement by giving a minimum of six months prior written notice to the other partner. For this purpose, the notice must be given by a person occupying the position of signatory to the Interim Agreement. The Interim Agreement may also be terminated at any time with the concurrence of the partners expressed by an exchange of letters between the persons occupying the positions of the signatories to the Interim Agreement.

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s.17

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SBC and RD will work together to determine RD's preference for reports received.

As per the MSA, at the request of RD, SBC shall obtain reports or provide information RD requires to meet or support its reporting obligations in connection with the following policies and legislation:

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- (d) CIO policies and standards;
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DISPUTE RESOLUTION

Any unresolved dispute with respect to the Interim Agreement will be referred to the Management Committee formed under the Service Level Agreement between The Ministry of Citizens' Services (formerly the Ministry of Technology, Innovation and Citizens' Services) and The Ministry of Finance. SBC may request the inclusion of additional staff members who are responsible for the management of the MSA as required.

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CONTACT INFORMATION

Interim Agreement Designated Officials

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For Service BC:

Peggy Duncan, Director, Service Design & Integration
Service BC, Ministry of Citizens' Services
PHONE: 778 698-2060
Peggy.Duncan@gov.bc.ca

For Revenue Division:

Ann Davies, Executive Director
Revenue Division, Ministry of Finance
PHONE: 778 698-4800
Ann.Davies@gov.bc.ca

Representing Service BC

Director, Service Design & Integration	NAME: Peggy Duncan ADDRESS: E161 – 4000 Seymour Place, PO Box 9412 Stn Prov Govt Victoria BC, V8W 9V1 PHONE: 778 698-2060 EMAIL: peggy.duncan@gov.bc.ca
Manager, Service Design & Integration	NAME: Michael Boreen ADDRESS: E161 – 4000 Seymour Place, PO Box 9412 Stn Prov Govt Victoria BC, V8W 9V1 PHONE: 778 698-2063 EMAIL: michael.boreen@gov.bc.ca
Operational Contact Contract Performance Manager	NAME: Liz Reading ADDRESS: E161 – 4000 Seymour Place, PO Box 9412 Stn Prov Govt Victoria BC, V8W 9V1 PHONE: 250 580-6339 EMAIL: liz.reading@gov.bc.ca

Revenue Division:

Executive Director Property Taxation Branch	NAME: Steven Emery ADDRESS: 4 th Fl – 1802 Douglas St Victoria BC V8T 4K6 PHONE: 778 698-3892 EMAIL: steven.emery@gov.bc.ca
Director	NAME: Kally Khaira

Property Taxation Branch	ADDRESS: 4 th Fl – 1802 Douglas St Victoria BC V8T 4K6 PHONE: 778 698-9536 EMAIL: kally.khaira@gov.bc.ca
Business Support Analyst Property Taxation Branch	NAME: Rick Lambrick ADDRESS: 4 th Fl - 1802 Douglas St Victoria BC V8T 4K6 PHONE: 778 698-3887 EMAIL: rick.lambrick@gov.bc.ca

This Interim Agreement is signed in duplicate, each version being equally authentic.

For the Ministry of Citizens' Services
Service BC
By: Peggy Duncan, Director

For the Ministry of Finance
Revenue Division
By: Ann Davies, Executive Director





Date: April 27, 2018

Date: April 27th, 2018

Appendix 1: Amendment to Interim Agreement

PURPOSE

This amendment to the Interim Agreement between Service BC (SBC) and Revenue Division (RD) is to add Phase 1 information and referral services for the Speculation Tax program (ST) to the existing Tier 1 contact centre support as provided by SBC's service provider.

TIMELINE

October 1, 2018 – December 31, 2018 will be the timeline for the services described in this Amendment.

ADDITIONAL INFORMATIONAL SERVICES

- a) Answer the most frequently asked questions from citizens when enquiring about ST. ST enquiries will come in through a dedicated phone number, to be set up by October 15, 2018 as well as through email.
- b) The SBC service provider will provide hours of service from 7:30am – 5pm (PST) 5 days per week.

FINANCIALS

The economic model for the Speculation Tax program is described in the table below.

SPECULATION TAX					
Province Fiscal year Summary	18/19	19/20	20/21	21/22	Total

s.17

Total Price	19,721	-	-	-	19,721
Service BC Transition Resource	-	-	-	-	-
Service BC Contract Admin Fee	603	-	-	-	603
Total Price	20,325	-	-	-	20,325

Transition Fees	9,665	-	-	-	9,665
Base Fees	10,660	-	-	-	10,660

Assumptions and considerations:

Baseline Response (October 1 2018 to December 31 2018)

- a. s.17
- b. Based on volumes provided by FIN during business hours of 7:30am –5pm (PST) 5 days per week s.17
- c. s.17
- d.
- e. Training for agents for this time period will be managed through updates to the knowledge base and notification of the new program (i.e. no formal training will be developed or provided for this phase).

Amendment Payment Schedule

The table below describes the payment schedule for the Amendment. These fees are due as indicated.

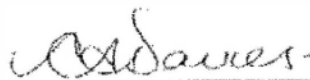
Payment Amount	Due Date
\$6,573.66	October 31, 2018
\$6,573.66	November 30, 2018
\$6,573.66	December 31, 2018

This Amendment is signed in duplicate, each version being equally authentic.

For the Ministry of Citizens' Services
Service BC
By: Peggy Duncan, Director

For the Ministry of Finance
Revenue Division
By: Ann Davies, Executive Director





Date: September 20, 2018

Date: September 27, 2018

Appendix 2: Amendment to Interim Agreement

PURPOSE

This amendment to the Interim Agreement between Service BC (SBC) and Revenue Division (RD) is to add Phase II services (declaration support) for the Speculation and Vacancy Tax program (SVT) to the existing Tier 1 contact centre support as provided by SBC's service provider.

TIMELINE

November 01, 2018 to January 02, 2019 will be the timeline to complete the activities required to transition Phase II SVT services to the contact centre.

Contact centre support for the Phase I SVT informational services will continue from January 2, 2019 and finish January 21, 2019.

Contact centre support for the in-scope Phase II SVT services will commence January 21, 2019 and finish May 31, 2019.

ADDITIONAL INFORMATIONAL SERVICES

- a) Answer the most frequently asked questions from citizens when enquiring about the declaration process for SVT. SVT enquiries will come in through a dedicated phone number as well as through email.
- b) Provide citizens with website navigation and assistance and guidance to complete online forms and applications available on the website.
- c) Use the external services manager to look up the declaration code for citizens.
- d) The SBC service provider will provide extended hours of service from January 21, 2019 to March 31, 2019. Extended hours will be 8am – 8pm (PST) 7 days a week.

ADDITIONAL TRANSACTIONAL SERVICES

- e) Completing the SVT declaration for citizens. Inputting specific information from citizens directly into the eTax declaration system. SVT declaration occurs between January and May (exact dates will vary from year to year)
- f) Email or text a declaration confirmation number to citizens

Where the SBC service provider has received a call pertaining to an SVT issue that requires escalation, the SBC service provider will follow the escalation process that has been agreed to between the two parties.

FINANCIALS

The economic model for Phase II of the Speculation and Vacancy Tax is described in the table below.

SPECULATION TAX					
Province Fiscal year Summary	18/19	19/20	20/21	21/22	Total

s.17

Total Price	731,796	457,584	-	-	1,189,380
Service BC Transition Resource	30,000	-	-	-	30,000
Service BC Contract Admin Fee	43,249	27,043	-	-	70,292
Total Price	805,045	484,627	-	-	1,289,672

Transition Fees	60,445	-	-	-	60,445
Base Fees	744,600	484,627	-	-	1,229,227

Assumptions and considerations:

This Financial Model is based on the following:

- Beginning January 21, the first 100,000 letters will be sent out (consisting mostly of international addresses);
- Every business day thereafter, another 100,000 letters will be sent up until February 8 (expectation is that all letters be in Canada Post's care as of February 14);
- Overall, 500k letters will be sent each week for the three-week period (accounting for approximately a total of 1.4 to 1.5 million letters)
- A true up may be required in June due to the number of assumptions concerning call volumes over this short period and there could be quite material differences in the effect of this if the assumptions change.
- Transition costs are November 1 to Operations Go-Live Date of Jan 2, 2019.
- Capacity of named agents (ie. head count) has been limited to^{s.15}
- In case of cancellation:

s.17

Transition Milestones

The following are milestones for this transition:

Number	Milestone	Milestone Deadline	Milestone Completion Criteria
1.	Approval of Detailed Transition Plan and delivery of Transition Success Report	29 November, 2018	Province provides Approval for Detailed Transition Plan and Service Provider provides interim Transition Success Report.
2.	Transitioned Services Go Live Approval and delivery to the Province of the final Transition Success Report and Transition Deficiencies Log.	13 December, 2018	Province provides Transitioned Services Go Live Approval
3.	Completion of the Transition and delivery to the Province of the updated Transition Deficiencies Log.	7 January, 2019	Services are being provided by the Service Provider as of the Go Live Date with no critical deficiencies.

Amendment Payment Schedule

Payment to be made by the Province in five equal payments of ^{s.17} in the months of January– May 2019. For clarity, while payments are not linked to delivery of individual Milestones, all fees including Transition fees, will only be released on successful delivery of all Milestones.

This Amendment is signed in duplicate, each version being equally authentic.

For the Ministry of Citizens' Services
Service BC
By: Peggy Duncan, Director

For the Ministry of Finance
Revenue Division
By: Ann Davies, Executive Director

A handwritten signature in cursive script, appearing to read "Ann Davies", written over a horizontal line.

Date: _____

Date: December 11, 2018

Appendix 2: Amendment to Interim Agreement

PURPOSE

This amendment to the Interim Agreement between Service BC (SBC) and Revenue Division (RD) is to add Phase II services (declaration support) for the Speculation and Vacancy Tax program (SVT) to the existing Tier 1 contact centre support as provided by SBC's service provider.

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November 01, 2018 to January 02, 2019 will be the timeline to complete the activities required to transition Phase II SVT services to the contact centre.

Contact centre support for the Phase I SVT informational services will continue from January 2, 2019 and finish January 21, 2019.

Contact centre support for the in-scope Phase II SVT services will commence January 21, 2019 and finish May 31, 2019.

ADDITIONAL INFORMATIONAL SERVICES

- a) Answer the most frequently asked questions from citizens when enquiring about the declaration process for SVT. SVT enquiries will come in through a dedicated phone number.^{s.13}
- b) Provide citizens with website navigation and assistance and guidance to complete online forms and applications available on the website.
- c) Use the external services manager to look up the declaration code, letter ID and account balances for citizens.
- d) The SBC service provider will provide extended hours of service from January 21, 2019 to March 31, 2019. Extended hours will be 8am – 8pm (PST) Monday to Friday and 8am – 5pm (PST) Saturday and Sunday.

ADDITIONAL TRANSACTIONAL SERVICES

- e) Completing the SVT declaration for citizens. Inputting specific information from citizens directly into the eTaxBC declarations.¹³ application. SVT declaration peaks occurs between January and May (exact dates will vary from year to year)
- f) Email or text a declaration confirmation number to citizens

Where the SBC service provider has received a call pertaining to an SVT issue that requires escalation, the SBC service provider will follow the escalation process that has been agreed to between the two parties.

FINANCIALS

The economic model for Phase II of the Speculation and Vacancy Tax is described in the table below.

SPECULATION TAX						
Province Fiscal year Summary	16/17	17/18	18/19	19/20	20/21	21/22

s.17

Total Price	-	-	731,796	457,584	-	-	1,189,380
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Assumptions and considerations:

This Financial Model is based on the following:

- a. Beginning January 21, the first 100,000 letters will be sent out (consisting mostly of international addresses);
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- c. Overall, 500k letters will be sent each week for the three-week period (accounting for approximately a total of 1.4 to 1.5 million letters)
- d. A true up may be required in June due to the number of assumptions concerning call volumes over this short period and there could be quite material differences in the effect of this if the assumptions change.
- e. Transition costs are November 1 to Operations Go-Live Date of Jan 2, 2019.
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- g. In case of cancellation: 5

s.17

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3.	Completion of the Transition and delivery to the Province of the updated Transition Deficiencies Log.	7 January, 2019	Services are being provided by the Service Provider as of the Go Live Date with no critical deficiencies.

Amendment Payment Schedule

Payment to be made by the Province in five equal payments of \$237,876.00 in the months of January– May 2019. For clarity, while payments are not linked to delivery of individual Milestones, all fees including Transition fees, will only be released on successful delivery of all Milestones.

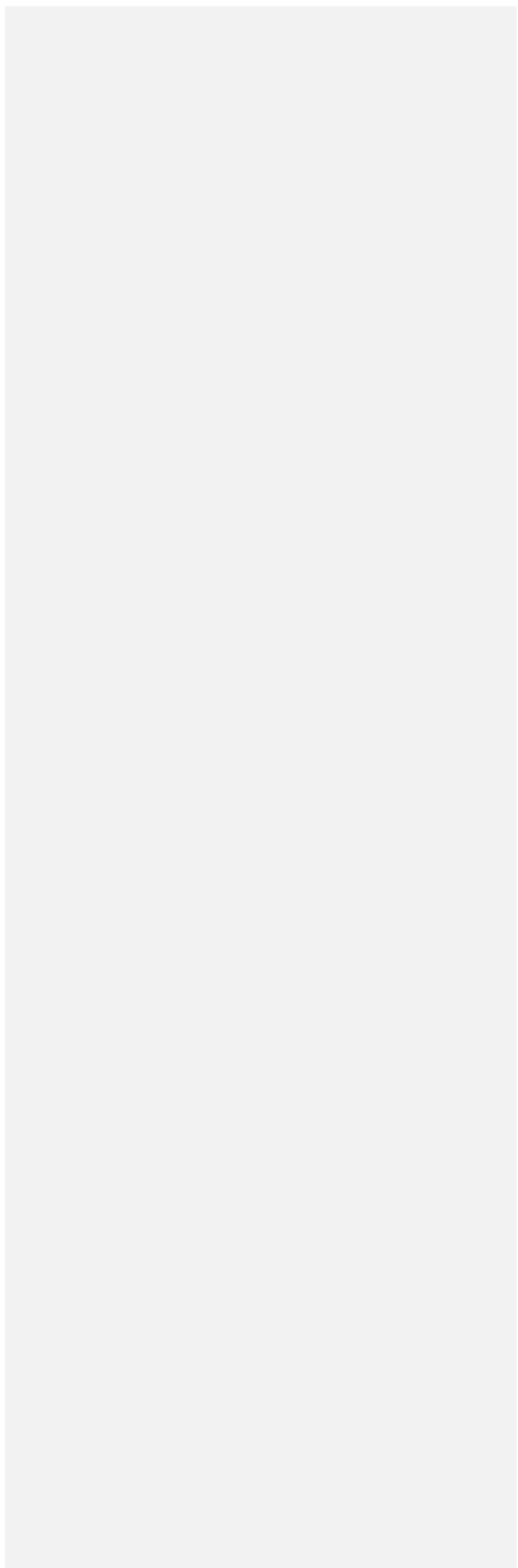
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For the Ministry of Citizens' Services
Service BC
By: Peggy Duncan, Director

For the Ministry of Finance
Revenue Division
By: Ann Davies, Executive Director

Date: _____

Date: _____





Service BC

INTERIM AGREEMENT

Between

**SERVICE BC
MINISTRY OF CITIZENS' SERVICES**

and

**REVENUE DIVISION (RD)
MINISTRY OF FINANCE**

REVISED: March 29, 2018

PURPOSE

This Interim Agreement between Service BC (SBC) and Revenue Division (RD) is to formalize the services and methodologies that the partners identified above (hereinafter described as "the partners") will implement for the provision of Tier 1 contact centre support as provided by SBC's service provider for Rural Property Tax (RPT), Property Tax Deferment (PTD), and Home Owner Grants (HOG).

This Interim Agreement has been created as a temporary document until the Ministry of Finance / Service BC Memorandum of Understanding (MOU) describing all services provided by Service BC on behalf of the various branches within the Ministry of Finance has been updated to include the Contact Centre services. This Interim Agreement will be superseded by the new MOU upon execution.

There are certain terms within this Interim Agreement that have been capitalized as they are defined terms in the Master Service Agreement (MSA) with SBC's service provider. In some circumstances there are direct references to the SBC MSA, in order to precisely articulate pre-determined services and/or requirements that were negotiated with the service provider that must be adhered to by all parties who enter into an agreement for SBC Contact Centre services.

RECOGNIZING THAT

Service BC is responsible for the management of the Master Service Agreement and all associated schedules and change orders with MAXIMUS Canada for the provision of Contact Centre services.

Service BC and the Ministry of Finance have an existing agreement effective June 20, 2014. Clause 9.5 of the existing Service BC/Finance agreement provides that projects involving the two parties will be detailed in project documentation.

TIMELINE

December 11, 2017 to March 28, 2018 will be the timeline to complete the activities required to transition the provision of contact centre support from the incumbent service provider to the new Service BC service provider.

Contact centre support for the in-scope RD- services will commence March 29, 2018.

SERVICES

PART 1: Transition Services

The partners will be responsible for assigning appropriate personnel in order to achieve successful implementation of the transition project. Partners will establish clear lines of communication to ensure both parties are aware of timelines, communications, approvals and training.

By December 20, 2017,

- RD will provide any updated policies, procedures and work instructions to SBC for distribution to the SBC service provider so that they can create their own training materials and Knowledge Base Articles (as defined in the MSA).

By December 29, 2017,

- RD will make best efforts to, subject to its confidentiality obligations to the incumbent service provider, provide details of the incumbent service provider's termination assistance plan in connection with the transition of services;
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On an ongoing basis RD will, through SBC service delivery team, assist with the resolution of any issues that arise between the SBC service provider and the incumbent service provider and/or RD, as permitted.

A high-level transition plan will be agreed to at the signing of this agreement. This plan will support the development of a detailed transition plan that will be modified as and when required.

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SBC Service Provider:

The SBC service provider will provide Tier 1 contact centre support to provide citizens with general information about HOG, PTD, and RPT. Tier 1 support includes:

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- a) Step-by-step instructions for using the GenTax system for calls regarding RPT and creating a Property Tax Copy Notice for citizens;
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Peggy Duncan, Director, Service Design & Integration
Service BC, Ministry of Citizens' Services
PHONE: 778 698-2060
Peggy.Duncan@gov.bc.ca

For Revenue Division:

Ann Davies, Executive Director
Revenue Division, Ministry of Finance
PHONE: 778 698-4800
Ann.Davies@gov.bc.ca

Representing Service BC

Director, Service Design & Integration	NAME: Peggy Duncan ADDRESS: E161 – 4000 Seymour Place, PO Box 9412 Stn Prov Govt Victoria BC, V8W 9V1 PHONE: 778 698-2060 EMAIL: peggy.duncan@gov.bc.ca
Manager, Service Design & Integration	NAME: Michael Boreen ADDRESS: E161 – 4000 Seymour Place, PO Box 9412 Stn Prov Govt Victoria BC, V8W 9V1 PHONE: 778 698-2063 EMAIL: michael.boreen@gov.bc.ca
Operational Contact Contract Performance Manager	NAME: Liz Reading ADDRESS: E161 – 4000 Seymour Place, PO Box 9412 Stn Prov Govt Victoria BC, V8W 9V1 PHONE: 250 580-6339 EMAIL: liz.reading@gov.bc.ca

Revenue Division:

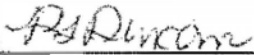
Executive Director Property Taxation Branch	NAME: Steven Emery ADDRESS: 4 th Fl – 1802 Douglas St Victoria BC V8T 4K6 PHONE: 778 698-3892 EMAIL: steven.emery@gov.bc.ca
Director	NAME: Kally Khaira

Property Taxation Branch	ADDRESS: 4 th Fl – 1802 Douglas St Victoria BC V8T 4K6 PHONE: 778 698-9536 EMAIL: kally.khaira@gov.bc.ca
Business Support Analyst Property Taxation Branch	NAME: Rick Lambrick ADDRESS: 4 th Fl - 1802 Douglas St Victoria BC V8T 4K6 PHONE: 778 698-3887 EMAIL: rick.lambrick@gov.bc.ca

This Interim Agreement is signed in duplicate, each version being equally authentic.

For the Ministry of Citizens' Services
Service BC
By: Peggy Duncan, Director

For the Ministry of Finance
Revenue Division
By: Ann Davies, Executive Director





Date: April 27, 2018

Date: April 27th, 2018

Appendix 1: Amendment to Interim Agreement

PURPOSE

This amendment to the Interim Agreement between Service BC (SBC) and Revenue Division (RD) is to add Phase 1 information and referral services for the Speculation Tax program (ST) to the existing Tier 1 contact centre support as provided by SBC's service provider.

TIMELINE

October 1, 2018 – December 31, 2018 will be the timeline for the services described in this Amendment.

ADDITIONAL INFORMATIONAL SERVICES

- a) Answer the most frequently asked questions from citizens when enquiring about ST. ST enquiries will come in through a dedicated phone number, to be set up by October 15, 2018 as well as through email.
- b) The SBC service provider will provide hours of service from 7:30am – 5pm (PST) 5 days per week.

FINANCIALS

The economic model for the Speculation Tax program is described in the table below.

SPECULATION TAX					
Province Fiscal year Summary	18/19	19/20	20/21	21/22	Total

Assumptions and considerations:

Baseline Response (October 1 2018 to December 31 2018)

- a. ^{s.17}
- b. Based on volumes provided by FIN during business hours of 7:30am –5pm (PST) 5 days per week ^{s.17}
- c. ^{s.17}
- d.
- e. Training for agents for this time period will be managed through updates to the knowledge base and notification of the new program (i.e. no formal training will be developed or provided for this phase).

Amendment Payment Schedule

The table below describes the payment schedule for the Amendment. These fees are due as indicated.

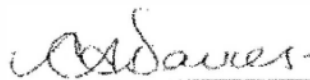
Payment Amount	Due Date
\$6,573.66	October 31, 2018
\$6,573.66	November 30, 2018
\$6,573.66	December 31, 2018

This Amendment is signed in duplicate, each version being equally authentic.

For the Ministry of Citizens' Services
Service BC
By: Peggy Duncan, Director

For the Ministry of Finance
Revenue Division
By: Ann Davies, Executive Director





Date: September 20, 2018

Date: September 27, 2018

Appendix 2: Amendment to Interim Agreement

PURPOSE

This amendment to the Interim Agreement between Service BC (SBC) and Revenue Division (RD) is to add Phase II services (declaration support) for the Speculation and Vacancy Tax program (SVT) to the existing Tier 1 contact centre support as provided by SBC's service provider.

TIMELINE

November 01, 2018 to January 02, 2019 will be the timeline to complete the activities required to transition Phase II SVT services to the contact centre.

Contact centre support for the Phase I SVT informational services will continue from January 2, 2019 and finish January 21, 2019.

Contact centre support for the in-scope Phase II SVT services will commence January 21, 2019 and finish May 31, 2019.

ADDITIONAL INFORMATIONAL SERVICES

- a) Answer the most frequently asked questions from citizens when enquiring about the declaration process for SVT. SVT enquiries will come in through a dedicated phone number as well as through email.
- b) Provide citizens with website navigation and assistance and guidance to complete online forms and applications available on the website.
- c) Use the external services manager to look up the declaration code for citizens.
- d) The SBC service provider will provide extended hours of service from January 21, 2019 to March 31, 2019. Extended hours will be 8am – 8pm (PST) 7 days a week.

ADDITIONAL TRANSACTIONAL SERVICES

- e) Completing the SVT declaration for citizens. Inputting specific information from citizens directly into the eTax declaration system. SVT declaration occurs between January and May (exact dates will vary from year to year)
- f) Email or text a declaration confirmation number to citizens

Where the SBC service provider has received a call pertaining to an SVT issue that requires escalation, the SBC service provider will follow the escalation process that has been agreed to between the two parties.

FINANCIALS

The economic model for Phase II of the Speculation and Vacancy Tax is described in the table below.

SPECULATION TAX					
Province Fiscal year Summary	18/19	19/20	20/21	21/22	Total

s.17

Total Price	731,796	457,584	-	-	1,189,380
Service BC Transition Resource	30,000	-	-	-	30,000
Service BC Contract Admin Fee	43,249	27,043	-	-	70,292
Total Price	805,045	484,627	-	-	1,289,672

Transition Fees	60,445	-	-	-	60,445
Base Fees	744,600	484,627	-	-	1,229,227

Assumptions and considerations:

This Financial Model is based on the following:

- Beginning January 21, the first 100,000 letters will be sent out (consisting mostly of international addresses);
- Every business day thereafter, another 100,000 letters will be sent up until February 8 (expectation is that all letters be in Canada Post's care as of February 14);
- Overall, 500k letters will be sent each week for the three-week period (accounting for approximately a total of 1.4 to 1.5 million letters)
- A true up may be required in June due to the number of assumptions concerning call volumes over this short period and there could be quite material differences in the effect of this if the assumptions change.
- Transition costs are November 1 to Operations Go-Live Date of Jan 2, 2019.
- Capacity of named agents (ie. head count) has been limited to ^{s.15}
- In case of cancellation:

s.17

Transition Milestones

The following are milestones for this transition:

Number	Milestone	Milestone Deadline	Milestone Completion Criteria
1.	Approval of Detailed Transition Plan and delivery of Transition Success Report	29 November, 2018	Province provides Approval for Detailed Transition Plan and Service Provider provides interim Transition Success Report.
2.	Transitioned Services Go Live Approval and delivery to the Province of the final Transition Success Report and Transition Deficiencies Log.	13 December, 2018	Province provides Transitioned Services Go Live Approval
3.	Completion of the Transition and delivery to the Province of the updated Transition Deficiencies Log.	7 January, 2019	Services are being provided by the Service Provider as of the Go Live Date with no critical deficiencies.

Amendment Payment Schedule

Payment to be made by the Province in five equal payments of ^{s.17} in the months of January– May 2019. For clarity, while payments are not linked to delivery of individual Milestones, all fees including Transition fees, will only be released on successful delivery of all Milestones.

This Amendment is signed in duplicate, each version being equally authentic.

For the Ministry of Citizens' Services
Service BC
By: Peggy Duncan, Director

For the Ministry of Finance
Revenue Division
By: Ann Davies, Executive Director

Date: _____

Date: _____

Appendix 2: Amendment to Interim Agreement

PURPOSE

This amendment to the Interim Agreement between Service BC (SBC) and Revenue Division (RD) is to add Phase II services (declaration support) for the Speculation and Vacancy Tax program (SVT) to the existing Tier 1 contact centre support as provided by SBC's service provider.

TIMELINE

November 01, 2018 to January 02, 2019 will be the timeline to complete the activities required to transition Phase II SVT services to the contact centre.

Contact centre support for the Phase I SVT informational services will continue from January 2, 2019 and finish January 21, 2019.

Contact centre support for the in-scope Phase II SVT services will commence January 21, 2019 and finish May 31, 2019.

ADDITIONAL INFORMATIONAL SERVICES

- a) Answer the most frequently asked questions from citizens when enquiring about the declaration process for SVT. SVT enquiries will come in through a dedicated phone number as well as through email.
- b) Provide citizens with website navigation and assistance and guidance to complete online forms and applications available on the website.
- c) Use the external services manager to look up the declaration code for citizens.
- d) The SBC service provider will provide extended hours of service from January 21, 2019 to March 31, 2019. Extended hours will be 8am – 8pm (PST) Monday to Friday and 8am – 5pm (PST) Saturday and Sunday.

ADDITIONAL TRANSACTIONAL SERVICES

- e) Completing the SVT declaration for citizens. Inputting specific information from citizens directly into the eTax declaration system. SVT declaration occurs between January and May (exact dates will vary from year to year)
- f) Email or text a declaration confirmation number to citizens

Where the SBC service provider has received a call pertaining to an SVT issue that requires escalation, the SBC service provider will follow the escalation process that has been agreed to between the two parties.

SVT - PM / Transition Leads

Dec 5/18

- if formal communication re:
8-8 / 7-10 day

- PIA / STRA work - Maximum side
to IMB rep.

Speculation Tax - Mearns / Claire

July 26/18

① Interim Agreement
↳ amendment → status? (HOGA)
- where is this at?
- amend to Spec Tax

② PIA - if we can append interim then
update PIA
↳ PIA initiative update

③ Overarching Master Agreement
↳ to SBC
- Evan Burrows (not Toni)

- co-browsing - STRA required
↳ perhaps appendix → update as needed

? timing - Master April 1/19

↳ interim for Spec. Tax

④ ? SBC Offices - who at PTB is owning
this piece

personal info
33.1.(7) - OK

BC Mail
agreement

From: [Emery, Steven B FIN:EX](#)
To: [Mann, Dawn FIN:EX](#)
Subject: RE: Follow up: SBC Contact Centre Project
Date: July 16, 2018 10:33:24 AM

Good morning! Who did the PIA last time?

Steven Emery

Executive Director, Property Taxation Branch

From: Mann, Dawn FIN:EX
Sent: Monday, July 16, 2018 9:46 AM
To: Emery, Steven B FIN:EX
Subject: RE: Follow up: SBC Contact Centre Project
Hi Steven,

Would you like Treana to draft a PIA as well as incorporate this into the SBC Master Agreement?

Thank you in advance,

Dawn Mann

Manager, Divisional Projects
Tel: 250.356.6250

From: Emery, Steven B FIN:EX
Sent: Friday, July 13, 2018 4:14 PM
To: Ford, Louise E FIN:EX; Mann, Dawn FIN:EX
Cc: Davies, Ann FIN:EX
Subject: RE: Follow up: SBC Contact Centre Project

Yes, this makes total sense! Replicate the success from last time. Thanks Dawn!

And Dawn, can you connect with Treana regarding the drafting of the agreement? I know she would like to be involved sooner in the process.

Thanks!!

Steven Emery

Executive Director, Property Taxation Branch

From: Ford, Louise E FIN:EX
Sent: Friday, July 13, 2018 2:40 PM
To: Mann, Dawn FIN:EX; Emery, Steven B FIN:EX
Cc: Davies, Ann FIN:EX
Subject: RE: Follow up: SBC Contact Centre Project

Hi Dawn,

I think this makes sense. Welcome aboard. For reporting purposes, Steven may require status updates on this piece of the Spec Project to go to Barb so it can be consolidated, however he will let you know what he requires. Thanks so much for helping with this.

Louise Ford

Manager, Systems Operations & Policy
Ministry of Finance, Property Taxation Branch
Telephone: 778 698-3962
Email: Louise.Ford@gov.bc.ca

Trusted financial and economic leadership for a prosperous province

From: Mann, Dawn FIN:EX
Sent: Friday, July 13, 2018 8:33 AM
To: Emery, Steven B FIN:EX; Ford, Louise E FIN:EX
Cc: Davies, Ann FIN:EX
Subject: Follow up: SBC Contact Centre Project

Good morning,

Thank you again for allowing me to sit in on the meeting yesterday afternoon to understand the

needs of this particular component of the Speculation Tax implementation.

In reflecting on the efforts put in to transition some of our existing programs from ESIT over to the SBC Contact Centre, I would support a dedicated resource for this component as it will be critical to your success this fall. I would be happy to work with Louise to take on the leadership of this part of the larger project to ensure a consistent approach is taken and that the needs required for “go live” are met.

Given our experience with the discovery and initiation phase of the contact centre onboarding, with your approval, I would like to reach out to both Peggy and Jeanette at SBC and get the ball rolling on next steps. As well, I would be happy to meet to discuss a governance model that will allow for ease of decision making as we move forward.

Let me if this plan works for you and thank you again,

Dawn Mann

Manager, Divisional Projects

Public Information and Corporate Services Branch

Ministry of Finance | Revenue Division

Tel: 250.356.6250 | Cell: 250.882.4583

Website: [Revenue Division Website](#)



Where ideas work



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From: [Cindy McMath](#)
To: [Mann, Dawn FIN:EX](#)
Cc: [Borrows, Erin CITZ:EX](#); [Mousseau, Jeff CITZ:EX](#); [Anjan Chhetry\(C\)](#); [Quill, Robert CITZ:EX](#)
Subject: RE: Information Required: Collection of Personal Information
Date: October 10, 2018 4:24:05 PM

Thanks for this Dawn,
Cindy

Cindy McMath

Manager – Strategic Initiatives

MAXIMUS Canada

716 Yates Street

Victoria, BC V8W 1L4

Office: 250-405-3842

Mobile: 250-884-9405

cindy.mcmath@maximuscanada.ca

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From: Mann, Dawn FIN:EX [<mailto:Dawn.Mann@gov.bc.ca>]

Sent: Thursday, October 04, 2018 3:41 PM

To: Cindy McMath

Cc: Borrows, Erin CITZ:EX; Mousseau, Jeff CITZ:EX; Anjan Chhetry(C); Quill, Robert CITZ:EX

Subject: FW: Information Required: Collection of Personal Information

Good afternoon Cindy,

I can confirm that the PIA update currently being completed will cover off any of the personal information that will be collected in phase II of this project.

Let me know if you have any questions,

Dawn Mann

Manager, Divisional Projects

Tel: 250.356.6250

From: Demianchuk, Janette FIN:EX

Sent: Thursday, October 4, 2018 3:09 PM

To: Mann, Dawn FIN:EX

Cc: Brouwer, Deborah FIN:EX

Subject: RE: Information Required: Collection of Personal Information

Hi Dawn,

Yes, we will be completing a PIA update to the Tier 1 Service BC PIA that will include personal information that will be collected.

Let me know of any questions.

Thanks,
Janette

From: Brouwer, Deborah FIN:EX

Sent: October 4, 2018 3:04 PM

To: Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>

Subject: FW: Information Required: Collection of Personal Information

From: Mann, Dawn FIN:EX

Sent: October 4, 2018 2:51 PM

To: Brouwer, Deborah FIN:EX <Deborah.Brouwer@gov.bc.ca>

Subject: Information Required: Collection of Personal Information

Good afternoon Deb,

During our meeting earlier today with SBC and MAXIMUS, a question was raised with regard to the collection of information. In anticipation of our next agreement draft for phase II, can you confirm that the PIA currently being developed will cover off the collection of personal information by the SBC Contact Centre?

Thank you in advance,

Dawn Mann

Manager, Divisional Projects

Public Information and Corporate Services Branch

Ministry of Finance | Revenue Division

Tel: 250.356.6250 | Cell: 250.882.4583

Website: [Revenue Division Website](#)



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From: [Brouwer, Deborah FIN:EX](#)
To: [Mann, Dawn FIN:EX](#)
Cc: [Demianchuk, Janette FIN:EX](#)
Subject: RE: PIA Update
Date: November 30, 2018 4:22:26 PM

Hi Dawn

We have two spec tax PIAs, here is where Janette is with them:

Operational PIA Phase 1 – with PCTB (Cole Lance). Steven and Kally have reviewed. Version saved at link below. PCTB may come back with additional questions. If not, it will come back signed, and will then need to be signed by Richard, Kally, Steven and then to Jordan.

Call Centre PIA update (FIN18070) – currently with PCTB (Jessica Bouchard) for first review. Richard and Pia have reviewed. PCTB may come back with questions.

From: Mann, Dawn FIN:EX
Sent: November 30, 2018 1:13 PM
To: Brouwer, Deborah FIN:EX
Subject: PIA Update

Hi Deb,

I was wondering if I might be able to get an update on the PIA for the Speculation and Vacancy Tax program. I have received a project plan from MAXIMUS that has both a PIA and STRA as a deliverable so would like to provide them with an update at our next governance meeting.

Thank you in advance,

Dawn Mann

Manager, Divisional Projects
Public Information and Corporate Services Branch
Ministry of Finance | Revenue Division
Tel: 250.356.6250 | Cell: 250.882.4583
Website: [Revenue Division Website](#)



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From: Clarke, Treana FIN:EX
To: Mann, Dawn FIN:EX; Brouwer, Deborah FIN:EX
Cc: Demianchuk, Janette FIN:EX; Lovell, Claire FIN:EX
Subject: RE: Tier 1 PIA Submission_PTB
Date: October 1, 2018 12:55:04 PM

FYI –

The Interim Agreement with Service BC is now posted to the Agreement Library here:

[https://fin.gov.bc.ca/ITAIR/MIL/FINAL%20%20MOUs%20and%20ISAs/Inter-Ministry%20\(BC\)%20and%20Inter-Agency/SLA%20-%20Revised%20Interim%20Agreement%20CITZ%20SBC%20and%20the%20Ministry%20of%20Finance%20\(146-45%20Service%20BC%20SLA%20-%20Sept%202018\).pdf](https://fin.gov.bc.ca/ITAIR/MIL/FINAL%20%20MOUs%20and%20ISAs/Inter-Ministry%20(BC)%20and%20Inter-Agency/SLA%20-%20Revised%20Interim%20Agreement%20CITZ%20SBC%20and%20the%20Ministry%20of%20Finance%20(146-45%20Service%20BC%20SLA%20-%20Sept%202018).pdf)

From: Mann, Dawn FIN:EX
Sent: Friday, September 28, 2018 1:41 PM
To: Clarke, Treana FIN:EX; Brouwer, Deborah FIN:EX
Cc: Demianchuk, Janette FIN:EX; Lovell, Claire FIN:EX
Subject: RE: Tier 1 PIA Submission_PTB

Hi all,

Thank you for the update(s) on both fronts. When we begin discussions on the phase II agreement I will be sure to stay connected this to group throughout the process.

Treana – as there is only a two page amendment to the existing interim agreement for the SBC Contact Centre, would you like a copy for your records?

Have a great weekend,

Dawn Mann

Manager, Divisional Projects
Tel: 250.356.6250

From: Clarke, Treana FIN:EX
Sent: Friday, September 28, 2018 1:02 PM
To: Brouwer, Deborah FIN:EX
Cc: Demianchuk, Janette FIN:EX; Lovell, Claire FIN:EX; Mann, Dawn FIN:EX
Subject: RE: Tier 1 PIA Submission_PTB

Hi Deb,

Yes, our goal is to have the re-write ready in time for Spec Tax. Claire will keep you apprised on progress and will reach out as necessary.

Thanks,

Treana

From: Brouwer, Deborah FIN:EX
Sent: Friday, September 28, 2018 12:43 PM
To: Mann, Dawn FIN:EX
Cc: Clarke, Treana FIN:EX; Demianchuk, Janette FIN:EX; Lovell, Claire FIN:EX
Subject: FW: Tier 1 PIA Submission_PTB

Hi Dawn,

See the status of the spec tax PIAs below from Janette. ^{s.13}

s.13

Thanks,

Deb

From: Demianchuk, Janette FIN:EX
Sent: September 28, 2018 9:42 AM
To: Brouwer, Deborah FIN:EX
Subject: RE: Tier 1 PIA Submission_PTB

Hi,

Our plan for the PIA is as follows:

1. Complete a PIA update to the Call Centre PIA that Roger drafted to include spec tax. The Call Centre PIA is complete however not signed as it can not be signed until the Common or Integrated Program Agreement (CIPA) is signed. Richard Barlow confirmed completing a PIA update for an unsigned PIA is not a concern. Timing to have this completed will be before January. First draft end of October/end of November.
2. Operational PIA for Spec Tax will be completed in two parts. First part will cover the test files needed for BCA/LTSA, the declaration and the NOFA/SOFA. Second phase will cover the tax credits, payments, audit and refunds. First draft of phase 1 to be completed for mid-October. First draft of phase 2 to be completed November.
3. System PIA update will be completed for the changes to Gentax needed to administer spec tax. This also covers e-Tax. Loise Lam is drafting this PIA update.

Let me know if that answers your question or if you need any further details. Thanks!

Thanks,
Janette

From: Brouwer, Deborah FIN:EX
Sent: September 28, 2018 9:30 AM
To: Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>
Subject: RE: Tier 1 PIA Submission_PTB
Good morning - What should we tell Dawn about the PIA?

From: Mann, Dawn FIN:EX
Sent: September 28, 2018 9:09 AM
To: Brouwer, Deborah FIN:EX <Deborah.Brouwer@gov.bc.ca>
Subject: RE: Tier 1 PIA Submission_PTB
Good morning Deb,
I thought I should circle back on this to see how the PIA is coming along for the Speculation Tax project.
I realized I did not respond to this email but should let you know that ^{s.13}

s.13

s.13

I'm hoping this is reasonable. If it is not,

when we negotiate the next agreement (for January 1st, I will get you involved so this can be addressed.

Let me know if you have any questions,

Dawn Mann

Manager, Divisional Projects
Tel: 250.356.6250

From: Brouwer, Deborah FIN:EX
Sent: Monday, August 27, 2018 2:06 PM
To: Mann, Dawn FIN:EX; Clarke, Treana FIN:EX
Cc: Demianchuk, Janette FIN:EX; Lovell, Claire FIN:EX
Subject: RE: Tier 1 PIA Submission_PTB

Ok, great! I think we can incorporate the SBC contract center piece into the Speculation tax program PIA.

s.13

From: Mann, Dawn FIN:EX
Sent: August 27, 2018 2:00 PM
To: Clarke, Treana FIN:EX <Treana.Clarke@gov.bc.ca>; Brouwer, Deborah FIN:EX <Deborah.Brouwer@gov.bc.ca>
Cc: Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>; Lovell, Claire FIN:EX <Claire.Lovell@gov.bc.ca>
Subject: RE: Tier 1 PIA Submission_PTB

Hi everyone,

To confirm – I am working with SBC on the amendment to the Interim Agreement and will be running it by David Seitz at RSB.

Dawn Mann

Manager, Divisional Projects

Tel: 250.356.6250

From: Clarke, Treana FIN:EX

Sent: Monday, August 27, 2018 1:56 PM

To: Brouwer, Deborah FIN:EX

Cc: Demianchuk, Janette FIN:EX; Lovell, Claire FIN:EX; Mann, Dawn FIN:EX

Subject: RE: Tier 1 PIA Submission_PTB

Hi Deb,

s.13

My team is not working on the amendment to the Interim agreement with Service BC. This was something Dawn was going to discuss with David Seitz.

I hope that helps clarify. Please let me know if you would like to discuss further.

Thanks,

Treana

From: Brouwer, Deborah FIN:EX

Sent: Monday, August 27, 2018 1:10 PM

To: Mann, Dawn FIN:EX

Cc: Demianchuk, Janette FIN:EX; Clarke, Treana FIN:EX

Subject: RE: Tier 1 PIA Submission_PTB

Hi Dawn,

Janette Demianchuk is going to be our spec tax lead on information sharing and will handle the speculation tax program PIA.

What "PIA Initiative Update" is required related to the SBC Contact Centre? Do we need to do one following Roger's model? Or do we incorporate it into the CIPA that I think Treana's group is working on?

Thanks,

Deb

From: Mann, Dawn FIN:EX

Sent: August 27, 2018 12:40 PM

To: Brouwer, Deborah FIN:EX <Deborah.Brouwer@gov.bc.ca>

Subject: FW: Tier 1 PIA Submission_PTB

Hi Deb,

I thought I would follow up on this to confirm who will be taking the lead on this for you?

Thank you in advance,

Dawn Mann

Manager, Divisional Projects

Tel: 250.356.6250

From: Mann, Dawn FIN:EX

Sent: Monday, August 13, 2018 11:17 AM

To: Tailleux, Roger FIN:EX

Cc: Ford, Louise E FIN:EX; Brouwer, Deborah FIN:EX

Subject: RE: Tier 1 PIA Submission_PTB

Hi Roger,

Thank you for following through on the completion of the PIA for the SBC Contact Centre Tier 1 services – well done! Looking forward, we will need to incorporate the new Speculation Tax into this PIA as well as the overarching master agreement. Treana Clarke is aware of the new Speculation Tax requirements so I am confident that will be completed

in the latest update.

Deborah - do you know who on your team would be able to take on a PIA Initiative Update for the new tax? I know we are waiting to hear back from Maximus and SBC on the cost model but expect this will be going ahead for mid-October.

Let me know and I will connect with you later in the week to discuss,

Dawn Mann

Manager, Divisional Projects

Tel: 250.356.6250

From: Tailleux, Roger FIN:EX

Sent: Monday, August 13, 2018 10:12 AM

To: Brouwer, Deborah FIN:EX

Cc: Mann, Dawn FIN:EX; Ford, Louise E FIN:EX

Subject: Tier 1 PIA Submission_PTB

Deborah,

Pia has reviewed our Maximus Tier 1 PIA and is okay with it as is, and so submitted it to PCT today, with the understanding that the CIPA is still being written and that changes to our PIA might be required in future so that it aligns with the CIPA.

Roger

Roger Tailleux

Policy & Legislative Analyst, BSF, RPF

Property Taxation Branch

778-698-3878

From: Dewar, Pia FIN:EX

Sent: Monday, August 13, 2018 10:02 AM

To: pia intake CITZ:EX

Cc: Tailleux, Roger FIN:EX

Subject: PIA Submission_PTB

Good morning,

Please accept this PIA I'm submitting on behalf of Property Taxation Branch (PTB). This PIA concerns the use of service provider Maximus Canada to operate a Tier 1-level call centre for multiple programs and initiatives. This PIA is being written in conjunction with a CIPA, currently still being worked on.

Thank you,

Pia Dewar, MLIS – Privacy & Security Analyst

Ministry of Finance, Corporate Services, Information Management Branch

Supporting Finance, Office of the Premier, various agencies, boards, & commissions

Cell: 778-678-1921

From: Mann, Dawn FIN:EX
To: Mousseau, Jeff CITZ:EX; Duncan, Peggy CITZ:EX
Cc: Demianchuk, Janette FIN:EX; McLaughlin, Heather FIN:EX
Subject: FW: collection notice - Maximus
Date: February 2, 2019 1:15:00 PM
Importance: High

Good afternoon,

FIN is looking to finalize the PIA for this project and we are looking for one last piece of information – please see highlight below.

As this is time sensitive, can we have this back by midday Monday, February 5th, 2019?

Thank you in advance,

Dawn Mann

Manager, Divisional Projects

Tel: 250.356.6250

From: Demianchuk, Janette FIN:EX
Sent: Friday, February 1, 2019 4:34 PM
To: Mann, Dawn FIN:EX ; McLaughlin, Heather FIN:EX
Cc: Lovell, Claire FIN:EX
Subject: collection notice - Maximus

Hi Dawn and Heather,

Do either of you happen to have access to what the collection notice says on the service bc phone line (Maximus) when someone calls in? I'm assuming there is one. It would be similar to "This information is collected under the authority of section 26(c) of FOIPPA. If you have questions about why your information is being collected, please contact....."

I need to include it in the PIA.

Thank you!

Janette Demianchuk
Legislative and Policy Analyst
Property Taxation Branch
Ministry of Finance
☎ 778-698-9164

From: [Demianchuk, Janette FIN:EX](#)
To: [Mann, Dawn FIN:EX](#)
Subject: RE: Call Verification Process for Maximus
Date: November 1, 2018 8:36:59 AM

Thank you!

Janette Demianchuk
Legislative and Policy Analyst
Property Taxation Branch
Ministry of Finance
☎ 778-698-9164

From: Mann, Dawn FIN:EX
Sent: October 31, 2018 3:52 PM
To: Demianchuk, Janette FIN:EX
Cc: McLaughlin, Heather FIN:EX
Subject: RE: Call Verification Process for Maximus

Hi Janette,

I apologize for the delay – I started a response but did not follow through with the send button! As it relates to the PIA, I may have been part of a discussion about the nature of the personal information that was going to be collected but wasn't involved in one about verification. I would be happy to follow up with SBC and have them run this down the current process for you this week – as it relates to PTB program work.

I will copy you on the email for reference,

Dawn Mann

Manager, Divisional Projects
Tel: 250.356.6250

From: Demianchuk, Janette FIN:EX
Sent: Tuesday, October 30, 2018 11:30 AM
To: McLaughlin, Heather FIN:EX; Mann, Dawn FIN:EX
Subject: Call Verification Process for Maximus

Hi,

One of you asked me about the verification process that Maximus staff will follow for spec tax (sorry, I can't remember who asked!) I'm just working on the Call Centre PIA, and in the current PIA that was completed for the other programs Maximus answers Tier 1 calls for it indicates:

- *agents follow a strict caller verification process to ensure the caller is authorized to receive the information requested*

It doesn't indicate what the strict verification process is.

Will Maximus use a different verification process for spec tax? Or do you happen to know what the current verification process is? Can you share it with me?

Thanks so much! Sorry for my very vague question....

Janette Demianchuk
Legislative and Policy Analyst
Property Taxation Branch
Ministry of Finance
☎ 778-698-9164

From: Mann, Dawn FIN:EX
To: Bell, Russell CITZ:EX
Cc: Mousseau, Jeff CITZ:EX; XT:HLTH White, Anne; Demianchuk, Janette FIN:EX
Subject: RE: Collection notice - Maximus
Date: February 4, 2019 1:52:00 PM

Hi Russell,

Thank you for the response – as this is time sensitive, if you are able to confirm today it would be appreciated.

Dawn Mann

Manager, Divisional Projects

Tel: 250.356.6250

From: Bell, Russell CITZ:EX
Sent: Monday, February 4, 2019 1:47 PM
To: Mann, Dawn FIN:EX
Cc: Mousseau, Jeff CITZ:EX
Subject: Collection notice - Maximus
Importance: High

Dawn,

I will investigate and provide you answer before noon tomorrow. I just want to check one thing with Maximus first.

Cheers

RB

Russell Bell

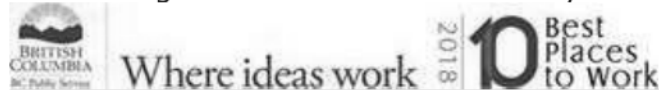
A/Director, Contact Centres

Service BC

Ministry of Citizens' Services

T: 250 952 6854 | M: 250-507-9572 | Web: <http://www.servicebc.gov.bc.ca>

"Access to government services made easy"



From: Mann, Dawn FIN:EX
Sent: February 2, 2019 1:15 PM
To: Mousseau, Jeff CITZ:EX <Jeff.Mousseau@gov.bc.ca>; Duncan, Peggy CITZ:EX <Peggy.Duncan@gov.bc.ca>
Cc: Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>; McLaughlin, Heather FIN:EX <Heather.McLaughlin@gov.bc.ca>
Subject: FW: collection notice - Maximus

Importance: High

Good afternoon,

FIN is looking to finalize the PIA for this project and we are looking for one last piece of information – please see highlight below.

As this is time sensitive, can we have this back by midday Monday, February 5th, 2019?

Thank you in advance,

Dawn Mann

Manager, Divisional Projects

Tel: 250.356.6250

From: Demianchuk, Janette FIN:EX

Sent: Friday, February 1, 2019 4:34 PM

To: Mann, Dawn FIN:EX <Dawn.Mann@gov.bc.ca>; McLaughlin, Heather FIN:EX <Heather.McLaughlin@gov.bc.ca>

Cc: Lovell, Claire FIN:EX <Claire.Lovell@gov.bc.ca>

Subject: collection notice - Maximus

Hi Dawn and Heather,

Do either of you happen to have access to what the collection notice says on the service bc phone line (Maximus) when someone calls in? I'm assuming there is one. It would be similar to "This information is collected under the authority of section 26(c) of FOIPPA. If you have questions about why your information is being collected, please contact....."

I need to include it in the PIA.

Thank you!

Janette Demianchuk

Legislative and Policy Analyst

Property Taxation Branch

Ministry of Finance

☎ 778-698-9164

From: [Emery, Steven B FIN:EX](#)
To: [Mann, Dawn FIN:EX](#)
Subject: RE: Follow up: SBC Contact Centre Project
Date: July 16, 2018 10:33:24 AM

Good morning! Who did the PIA last time?

Steven Emery

Executive Director, Property Taxation Branch

From: Mann, Dawn FIN:EX
Sent: Monday, July 16, 2018 9:46 AM
To: Emery, Steven B FIN:EX
Subject: RE: Follow up: SBC Contact Centre Project
Hi Steven,

Would you like Treana to draft a PIA as well as incorporate this into the SBC Master Agreement?

Thank you in advance,

Dawn Mann

Manager, Divisional Projects
Tel: 250.356.6250

From: Emery, Steven B FIN:EX
Sent: Friday, July 13, 2018 4:14 PM
To: Ford, Louise E FIN:EX; Mann, Dawn FIN:EX
Cc: Davies, Ann FIN:EX
Subject: RE: Follow up: SBC Contact Centre Project

Yes, this makes total sense! Replicate the success from last time. Thanks Dawn!

And Dawn, can you connect with Treana regarding the drafting of the agreement? I know she would like to be involved sooner in the process.

Thanks!!

Steven Emery

Executive Director, Property Taxation Branch

From: Ford, Louise E FIN:EX
Sent: Friday, July 13, 2018 2:40 PM
To: Mann, Dawn FIN:EX; Emery, Steven B FIN:EX
Cc: Davies, Ann FIN:EX
Subject: RE: Follow up: SBC Contact Centre Project

Hi Dawn,

I think this makes sense. Welcome aboard. For reporting purposes, Steven may require status updates on this piece of the Spec Project to go to Barb so it can be consolidated, however he will let you know what he requires. Thanks so much for helping with this.

Louise Ford

Manager, Systems Operations & Policy
Ministry of Finance, Property Taxation Branch
Telephone: 778 698-3962
Email: Louise.Ford@gov.bc.ca

Trusted financial and economic leadership for a prosperous province

From: Mann, Dawn FIN:EX
Sent: Friday, July 13, 2018 8:33 AM
To: Emery, Steven B FIN:EX; Ford, Louise E FIN:EX
Cc: Davies, Ann FIN:EX
Subject: Follow up: SBC Contact Centre Project

Good morning,

Thank you again for allowing me to sit in on the meeting yesterday afternoon to understand the

needs of this particular component of the Speculation Tax implementation.

In reflecting on the efforts put in to transition some of our existing programs from ESIT over to the SBC Contact Centre, I would support a dedicated resource for this component as it will be critical to your success this fall. I would be happy to work with Louise to take on the leadership of this part of the larger project to ensure a consistent approach is taken and that the needs required for “go live” are met.

Given our experience with the discovery and initiation phase of the contact centre onboarding, with your approval, I would like to reach out to both Peggy and Jeanette at SBC and get the ball rolling on next steps. As well, I would be happy to meet to discuss a governance model that will allow for ease of decision making as we move forward.

Let me if this plan works for you and thank you again,

Dawn Mann

Manager, Divisional Projects

Public Information and Corporate Services Branch

Ministry of Finance | Revenue Division

Tel: 250.356.6250 | Cell: 250.882.4583

Website: [Revenue Division Website](#)



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From: [Demianchuk, Janette FIN:EX](#)
To: [Mousseau, Jeff CITZ:EX](#)
Cc: [Borrows, Erin CITZ:EX](#); [Mann, Dawn FIN:EX](#)
Subject: RE: Information Required: Caller Verification Process
Date: November 1, 2018 2:41:13 PM
Attachments: [FIN18049 - PIA PTB Tier 1 FINAL 5SEPT2018.doc](#)
[Verify-Personal Info.docx](#)

Hi Jeff,

Thank you for your reply.

I've attached the Tier 1 PIA for your information. This PIA has not been signed as it's pending the signing of the CIPA. This is the PIA I'm updating for the spec tax.

I was just directed to the Tier 1 call centre verification process documents that we have saved here, so I believe I now have everything I need. (I've also attached as FYI.)

Thank you!

Janette Demianchuk
Legislative and Policy Analyst
Property Taxation Branch
Ministry of Finance
☎ 778-698-9164

From: Mousseau, Jeff CITZ:EX
Sent: November 1, 2018 2:05 PM
To: Mann, Dawn FIN:EX
Cc: Demianchuk, Janette FIN:EX ; Borrows, Erin CITZ:EX
Subject: RE: Information Required: Caller Verification Process

Dawn,

Thank you for your email.

I am looping in Erin Borrows into this conversation as she has more experience with FIN's PIAs and STRAs than I.

Here is what we know so far:

What SBC knows for the SVT Declaration Process (by phone)

- Declaration doesn't need to be property owner
- Declarer does need the declaration code (found on their declaration letter)
 - If they don't the code, the agent can look it up
 - The agent can see if a declaration has already been made, but can't tell the declarer what was declared
- No id verification is required of the declarer
- The SIN of the property owner & DOB of property owner is required
- If the declarer doesn't have the SIN & DOB – they go to MFIN Tier 2 or self-serve online

In terms of HOG by phone, it was the STRA that defined the "data elements that may be required from Citizens to provide contact centre service" which include: Name, Address, Phone #, Email and Folio number.

In regards to your reference of the last PIA and "agents follow a strict caller verification process", are you able to forward a copy of that document as we are having trouble locating that terminology in the documents we have on file.

It is my understanding from my conversation with Erin that the privacy folks like to keep PIAs pretty generic and open up the STRAs to more definitive items such as data elements. I hope this is a start to an answer to your original email.

Thanks,

Jeff.

From: Mann, Dawn FIN:EX

Sent: October 31, 2018 3:58 PM

To: Mousseau, Jeff CITZ:EX <Jeff.Mousseau@gov.bc.ca>

Cc: Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>

Subject: Information Required: Caller Verification Process

Hi Jeff,

As we develop the PIA for the SBC Contact Centre onboarding of the Speculation and Vacancy Tax program, a question has come up with regard to the caller verification process - to ensure the caller is authorized to receive the information being requested.

The last PIA completed for Revenue states that agents follow a strict caller verification process but it doesn't indicate what the strict verification process is. Are you able to provide this information? Do we expect they will do the same for the new program?

I have included our PTB Policy expert in this thread as she is working on the PIA. ☺

Thank you in advance,

Dawn Mann

Manager, Divisional Projects

Public Information and Corporate Services Branch

Ministry of Finance | Revenue Division

Tel: 250.356.6250 | Cell: 250.882.4583

Website: [Revenue Division Website](#)



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From: [Cindy McMath](#)
To: [Mann, Dawn FIN:EX](#)
Cc: [Borrows, Erin CITZ:EX](#); [Mousseau, Jeff CITZ:EX](#); [Anjan Chhetry\(C\)](#); [Quill, Robert CITZ:EX](#)
Subject: RE: Information Required: Collection of Personal Information
Date: October 10, 2018 4:24:05 PM

Thanks for this Dawn,
Cindy

Cindy McMath

Manager – Strategic Initiatives

MAXIMUS Canada

716 Yates Street

Victoria, BC V8W 1L4

Office: 250-405-3842

Mobile: 250-884-9405

cindy.mcmath@maximuscanada.ca

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From: Mann, Dawn FIN:EX [mailto:Dawn.Mann@gov.bc.ca]

Sent: Thursday, October 04, 2018 3:41 PM

To: Cindy McMath

Cc: Borrows, Erin CITZ:EX; Mousseau, Jeff CITZ:EX; Anjan Chhetry(C); Quill, Robert CITZ:EX

Subject: FW: Information Required: Collection of Personal Information

Good afternoon Cindy,

I can confirm that the PIA update currently being completed will cover off any of the personal information that will be collected in phase II of this project.

Let me know if you have any questions,

Dawn Mann

Manager, Divisional Projects

Tel: 250.356.6250

From: Demianchuk, Janette FIN:EX

Sent: Thursday, October 4, 2018 3:09 PM

To: Mann, Dawn FIN:EX

Cc: Brouwer, Deborah FIN:EX

Subject: RE: Information Required: Collection of Personal Information

Hi Dawn,

Yes, we will be completing a PIA update to the Tier 1 Service BC PIA that will include personal information that will be collected.

Let me know of any questions.

Thanks,
Janette

From: Brouwer, Deborah FIN:EX

Sent: October 4, 2018 3:04 PM

To: Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>

Subject: FW: Information Required: Collection of Personal Information

From: Mann, Dawn FIN:EX

Sent: October 4, 2018 2:51 PM

To: Brouwer, Deborah FIN:EX <Deborah.Brouwer@gov.bc.ca>

Subject: Information Required: Collection of Personal Information

Good afternoon Deb,

During our meeting earlier today with SBC and MAXIMUS, a question was raised with regard to the collection of information. In anticipation of our next agreement draft for phase II, can you confirm that the PIA currently being developed will cover off the collection of personal information by the SBC Contact Centre?

Thank you in advance,

Dawn Mann

Manager, Divisional Projects

Public Information and Corporate Services Branch

Ministry of Finance | Revenue Division

Tel: 250.356.6250 | Cell: 250.882.4583

Website: [Revenue Division Website](#)



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From: [Brouwer, Deborah FIN:EX](#)
To: [Mann, Dawn FIN:EX](#)
Cc: [Demianchuk, Janette FIN:EX](#)
Subject: RE: PIA Update
Date: November 30, 2018 4:22:26 PM

Hi Dawn

We have two spec tax PIAs, here is where Janette is with them:

Operational PIA Phase 1 – with PCTB (Cole Lance). Steven and Kally have reviewed. Version saved at link below. PCTB may come back with additional questions. If not, it will come back signed, and will then need to be signed by Richard, Kally, Steven and then to Jordan.

Call Centre PIA update (FIN18070) – currently with PCTB (Jessica Bouchard) for first review. Richard and Pia have reviewed. PCTB may come back with questions.

From: Mann, Dawn FIN:EX
Sent: November 30, 2018 1:13 PM
To: Brouwer, Deborah FIN:EX
Subject: PIA Update

Hi Deb,

I was wondering if I might be able to get an update on the PIA for the Speculation and Vacancy Tax program. I have received a project plan from MAXIMUS that has both a PIA and STRA as a deliverable so would like to provide them with an update at our next governance meeting.

Thank you in advance,

Dawn Mann

Manager, Divisional Projects
Public Information and Corporate Services Branch
Ministry of Finance | Revenue Division
Tel: 250.356.6250 | Cell: 250.882.4583
Website: [Revenue Division Website](#)



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From: Clarke, Treana FIN:EX
To: Mann, Dawn FIN:EX; Brouwer, Deborah FIN:EX
Cc: Demianchuk, Janette FIN:EX; Lovell, Claire FIN:EX
Subject: RE: Tier 1 PIA Submission_PTB
Date: October 1, 2018 12:55:04 PM

FYI –

The Interim Agreement with Service BC is now posted to the Agreement Library here:

[https://fin.gov.bc.ca/ITAIR/MIL/FINAL%20%20MOUs%20and%20ISAs/Inter-Ministry%20\(BC\)%20and%20Inter-Agency/SLA%20-%20Revised%20Interim%20Agreement%20CITZ%20SBC%20and%20the%20Ministry%20of%20Finance%20\(146-45%20Service%20BC%20SLA%20-%20Sept%202018\).pdf](https://fin.gov.bc.ca/ITAIR/MIL/FINAL%20%20MOUs%20and%20ISAs/Inter-Ministry%20(BC)%20and%20Inter-Agency/SLA%20-%20Revised%20Interim%20Agreement%20CITZ%20SBC%20and%20the%20Ministry%20of%20Finance%20(146-45%20Service%20BC%20SLA%20-%20Sept%202018).pdf)

From: Mann, Dawn FIN:EX
Sent: Friday, September 28, 2018 1:41 PM
To: Clarke, Treana FIN:EX; Brouwer, Deborah FIN:EX
Cc: Demianchuk, Janette FIN:EX; Lovell, Claire FIN:EX
Subject: RE: Tier 1 PIA Submission_PTB

Hi all,

Thank you for the update(s) on both fronts. When we begin discussions on the phase II agreement I will be sure to stay connected this to group throughout the process.

Treana – as there is only a two page amendment to the existing interim agreement for the SBC Contact Centre, would you like a copy for your records?

Have a great weekend,

Dawn Mann

Manager, Divisional Projects
Tel: 250.356.6250

From: Clarke, Treana FIN:EX
Sent: Friday, September 28, 2018 1:02 PM
To: Brouwer, Deborah FIN:EX
Cc: Demianchuk, Janette FIN:EX; Lovell, Claire FIN:EX; Mann, Dawn FIN:EX
Subject: RE: Tier 1 PIA Submission_PTB

Hi Deb,

Yes, our goal is to have the re-write ready in time for Spec Tax. Claire will keep you apprised on progress and will reach out as necessary.

Thanks,

Treana

From: Brouwer, Deborah FIN:EX
Sent: Friday, September 28, 2018 12:43 PM
To: Mann, Dawn FIN:EX
Cc: Clarke, Treana FIN:EX; Demianchuk, Janette FIN:EX; Lovell, Claire FIN:EX
Subject: FW: Tier 1 PIA Submission_PTB

Hi Dawn,

See the status of the spec tax PIAs below from Janette. ^{s.13}

s.13

Thanks,

Deb

From: Demianchuk, Janette FIN:EX
Sent: September 28, 2018 9:42 AM
To: Brouwer, Deborah FIN:EX
Subject: RE: Tier 1 PIA Submission_PTB

Hi,

Our plan for the PIA is as follows:

1. Complete a PIA update to the Call Centre PIA that Roger drafted to include spec tax. The Call Centre PIA is complete however not signed as it can not be signed until the Common or Integrated Program Agreement (CIPA) is signed. Richard Barlow confirmed completing a PIA update for an unsigned PIA is not a concern. Timing to have this completed will be before January. First draft end of October/end of November.
2. Operational PIA for Spec Tax will be completed in two parts. First part will cover the test files needed for BCA/LTSA, the declaration and the NOFA/SOFA. Second phase will cover the tax credits, payments, audit and refunds. First draft of phase 1 to be completed for mid-October. First draft of phase 2 to be completed November.
3. System PIA update will be completed for the changes to Gentax needed to administer spec tax. This also covers e-Tax. Loise Lam is drafting this PIA update.

Let me know if that answers your question or if you need any further details. Thanks!

Thanks,
Janette

From: Brouwer, Deborah FIN:EX
Sent: September 28, 2018 9:30 AM
To: Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>
Subject: RE: Tier 1 PIA Submission_PTB
Good morning - What should we tell Dawn about the PIA?

From: Mann, Dawn FIN:EX
Sent: September 28, 2018 9:09 AM
To: Brouwer, Deborah FIN:EX <Deborah.Brouwer@gov.bc.ca>
Subject: RE: Tier 1 PIA Submission_PTB
Good morning Deb,

I thought I should circle back on this to see how the PIA is coming along for the Speculation Tax project.

I realized I did not respond to this email but should let you know that **s.13**

s.13

s.13

I'm hoping this is reasonable. If it is not,

when we negotiate the next agreement (for January 1st), I will get you involved so this can be addressed.

Let me know if you have any questions,

Dawn Mann

Manager, Divisional Projects
Tel: 250.356.6250

From: Brouwer, Deborah FIN:EX
Sent: Monday, August 27, 2018 2:06 PM
To: Mann, Dawn FIN:EX; Clarke, Treana FIN:EX
Cc: Demianchuk, Janette FIN:EX; Lovell, Claire FIN:EX
Subject: RE: Tier 1 PIA Submission_PTB

Ok, great! I think we can incorporate the SBC contract center piece into the Speculation tax program PIA.

s.13

From: Mann, Dawn FIN:EX
Sent: August 27, 2018 2:00 PM
To: Clarke, Treana FIN:EX <Treana.Clarke@gov.bc.ca>; Brouwer, Deborah FIN:EX <Deborah.Brouwer@gov.bc.ca>
Cc: Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>; Lovell, Claire FIN:EX <Claire.Lovell@gov.bc.ca>
Subject: RE: Tier 1 PIA Submission_PTB

Hi everyone,

To confirm – I am working with SBC on the amendment to the Interim Agreement and will be running it by David Seitz at RSB.

Dawn Mann

Manager, Divisional Projects

Tel: 250.356.6250

From: Clarke, Treana FIN:EX

Sent: Monday, August 27, 2018 1:56 PM

To: Brouwer, Deborah FIN:EX

Cc: Demianchuk, Janette FIN:EX; Lovell, Claire FIN:EX; Mann, Dawn FIN:EX

Subject: RE: Tier 1 PIA Submission_PTB

Hi Deb,

s.13

My team is not working on the amendment to the Interim agreement with Service BC. This was something Dawn was going to discuss with David Seitz.

I hope that helps clarify. Please let me know if you would like to discuss further.

Thanks,

Treana

From: Brouwer, Deborah FIN:EX

Sent: Monday, August 27, 2018 1:10 PM

To: Mann, Dawn FIN:EX

Cc: Demianchuk, Janette FIN:EX; Clarke, Treana FIN:EX

Subject: RE: Tier 1 PIA Submission_PTB

Hi Dawn,

Janette Demianchuk is going to be our spec tax lead on information sharing and will handle the speculation tax program PIA.

What "PIA Initiative Update" is required related to the SBC Contact Centre? Do we need to do one following Roger's model? Or do we incorporate it into the CIPA that I think Treana's group is working on?

Thanks,

Deb

From: Mann, Dawn FIN:EX

Sent: August 27, 2018 12:40 PM

To: Brouwer, Deborah FIN:EX <Deborah.Brouwer@gov.bc.ca>

Subject: FW: Tier 1 PIA Submission_PTB

Hi Deb,

I thought I would follow up on this to confirm who will be taking the lead on this for you?

Thank you in advance,

Dawn Mann

Manager, Divisional Projects

Tel: 250.356.6250

From: Mann, Dawn FIN:EX

Sent: Monday, August 13, 2018 11:17 AM

To: Tailleux, Roger FIN:EX

Cc: Ford, Louise E FIN:EX; Brouwer, Deborah FIN:EX

Subject: RE: Tier 1 PIA Submission_PTB

Hi Roger,

Thank you for following through on the completion of the PIA for the SBC Contact Centre Tier 1 services – well done! Looking forward, we will need to incorporate the new Speculation Tax into this PIA as well as the overarching master agreement. Treana Clarke is aware of the new Speculation Tax requirements so I am confident that will be completed

in the latest update.

Deborah - do you know who on your team would be able to take on a PIA Initiative Update for the new tax? I know we are waiting to hear back from Maximus and SBC on the cost model but expect this will be going ahead for mid-October.

Let me know and I will connect with you later in the week to discuss,

Dawn Mann

Manager, Divisional Projects

Tel: 250.356.6250

From: Tailleux, Roger FIN:EX

Sent: Monday, August 13, 2018 10:12 AM

To: Brouwer, Deborah FIN:EX

Cc: Mann, Dawn FIN:EX; Ford, Louise E FIN:EX

Subject: Tier 1 PIA Submission_PTB

Deborah,

Pia has reviewed our Maximus Tier 1 PIA and is okay with it as is, and so submitted it to PCT today, with the understanding that the CIPA is still being written and that changes to our PIA might be required in future so that it aligns with the CIPA.

Roger

Roger Tailleux

Policy & Legislative Analyst, BSF, RPF

Property Taxation Branch

778-698-3878

From: Dewar, Pia FIN:EX

Sent: Monday, August 13, 2018 10:02 AM

To: pia intake CITZ:EX

Cc: Tailleux, Roger FIN:EX

Subject: PIA Submission_PTB

Good morning,

Please accept this PIA I'm submitting on behalf of Property Taxation Branch (PTB). This PIA concerns the use of service provider Maximus Canada to operate a Tier 1-level call centre for multiple programs and initiatives. This PIA is being written in conjunction with a CIPA, currently still being worked on.

Thank you,

Pia Dewar, MLIS – Privacy & Security Analyst

Ministry of Finance, Corporate Services, Information Management Branch

Supporting Finance, Office of the Premier, various agencies, boards, & commissions

Cell: 778-678-1921

From: Mann, Dawn FIN:EX
To: Bell, Russell CITZ:EX
Cc: Mousseau, Jeff CITZ:EX
Subject: Re: Collection notice - Maximus
Date: February 4, 2019 3:07:49 PM

Thank you Russell - much appreciated!

Dawn

Sent from my iPhone

On Feb 4, 2019, at 3:06 PM, Bell, Russell CITZ:EX <Russell.Bell@gov.bc.ca> wrote:

Dawn,

Prior to a caller reaching a Maximus rep they **will hear** the following three messages:

- During this call service BC may ask for and collect personal Information
- Your call may be recorded for quality assurance and training purposes
- Help us deliver great service by completing a short five question survey after your call, simply stay on the line after the agent completes the call to participate in the survey.

The agents are also given the following information from the knowledge base to share with callers:

PROTECTING PRIVACY

1. Why do I have to provide my social insurance number (SIN)? What is the government going to do with it?

<!--[if !supportLists]-->• <!--[endif]-->By collecting your SIN the B.C. government will be able to connect **property ownership** with **income tax data**.

<!--[if !supportLists]-->• <!--[endif]-->This will allow us to find satellite families or people who live in B.C. but pay little to no tax in B.C. or Canada.

<!--[if !supportLists]-->• <!--[endif]-->By providing your SIN you are helping ensure that everyone is paying their fair share of tax.

2. What if I don't want to provide my SIN? Can I still complete the declaration?

<!--[if !supportLists]-->• <!--[endif]-->No. If you are a Canadian, **you must provide your SIN to complete the declaration and claim your exemption**.

<!--[if !supportLists]-->• <!--[endif]-->Individuals who do not have a SIN will also be asked to provide an identifying number, such as their Business Number, trust Canada Revenue Agency account number and a provincial nomination number.

<!--[if !supportLists]-->• <!--[endif]-->If you don't provide your SIN or another accepted identification number, **you won't be able to complete your declaration and you will receive a tax notice of tax owing in March** – even if you are eligible for an exemption.

<!--[if !supportLists]-->• <!--[endif]-->**There will be no exceptions.**

3. How is the government protecting my privacy and taxpayer confidentiality?

<!--[if !supportLists]-->• <!--[endif]-->As with all taxpayer information, the B.C. government takes information privacy very seriously.

<!--[if !supportLists]-->• <!--[endif]-->The protection and confidentiality of taxpayer information are established through tax law.

<!--[if !supportLists]-->• <!--[endif]-->Individuals who violate the confidentiality under the law

can face penalties such as fines and imprisonment.
<!--[if !supportLists]-->•<!--[endif]-->The online application, eTax, is secure and approved to
protect taxpayer information.

Cheers

RB

Russell Bell

A/Director, Contact Centres

Service BC

Ministry of Citizens' Services

T: 250 952 6854 | M: 250-507-9572 | Web: <http://www.servicebc.gov.bc.ca>

“Access to government services made easy”

From: Bell, Russell CITZ:EX

Sent: February 4, 2019 1:47 PM

To: Mann, Dawn FIN:EX <Dawn.Mann@gov.bc.ca>

Cc: Mousseau, Jeff CITZ:EX <Jeff.Mousseau@gov.bc.ca>

Subject: Collection notice - Maximus

Importance: High

Dawn,

I will investigate and provide you answer before noon tomorrow. I just want to check
one thing with Maximus first.

Cheers

RB

Russell Bell

A/Director, Contact Centres

Service BC

Ministry of Citizens' Services

T: 250 952 6854 | M: 250-507-9572 | Web: <http://www.servicebc.gov.bc.ca>

“Access to government services made easy”

From: Mann, Dawn FIN:EX

Sent: February 2, 2019 1:15 PM

To: Mousseau, Jeff CITZ:EX <Jeff.Mousseau@gov.bc.ca>; Duncan, Peggy CITZ:EX
<Peggy.Duncan@gov.bc.ca>

Cc: Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>; McLaughlin,
Heather FIN:EX <Heather.McLaughlin@gov.bc.ca>

Subject: FW: collection notice - Maximus

Importance: High

Good afternoon,

FIN is looking to finalize the PIA for this project and we are looking for one last piece of
information – please see highlight below.

As this is time sensitive, can we have this back by midday Monday, February 5th, 2019?

Thank you in advance,

Dawn Mann

Manager, Divisional Projects

Tel: 250.356.6250

From: Demianchuk, Janette FIN:EX

Sent: Friday, February 1, 2019 4:34 PM

To: Mann, Dawn FIN:EX <Dawn.Mann@gov.bc.ca>; McLaughlin, Heather FIN:EX <Heather.McLaughlin@gov.bc.ca>

Cc: Lovell, Claire FIN:EX <Claire.Lovell@gov.bc.ca>

Subject: collection notice - Maximus

Hi Dawn and Heather,

Do either of you happen to have access to what the collection notice says on the service bc phone line (Maximus) when someone calls in? I'm assuming there is one. It would be similar to "This information is collected under the authority of section 26(c) of FOIPPA. If you have questions about why your information is being collected, please contact....."

I need to include it in the PIA.

Thank you!

Janette Demianchuk
Legislative and Policy Analyst
Property Taxation Branch
Ministry of Finance
778-698-9164

From: Mann, Dawn FIN:EX
To: Demianchuk, Janette FIN:EX
Subject: Re: Collection notice - Maximus
Date: February 4, 2019 3:14:52 PM

I'm not sure this is in line with what was discussed originally - it should be the same as RPT messaging.

Check in with Rick and Kally on this as queue messaging is not my area of expertise. We may need to include Service BC on this as well as they hold the contract with this vendor.

Dawn

Sent from my iPhone

On Feb 4, 2019, at 3:12 PM, Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca> wrote:

s.13

I'm surprised

it hasn't come up before. Do you know any history on it? If not, I'll chat with Kally about it.

From: Mann, Dawn FIN:EX
Sent: February 4, 2019 3:09 PM
To: Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>
Subject: Fwd: Collection notice - Maximus
Hi Janette,
Is this workable for you?
Dawn

Sent from my iPhone

Begin forwarded message:

From: "Bell, Russell CITZ:EX" <Russell.Bell@gov.bc.ca>
Date: February 4, 2019 at 3:06:49 PM PST
To: "Mann, Dawn FIN:EX" <Dawn.Mann@gov.bc.ca>, "Mousseau, Jeff CITZ:EX" <Jeff.Mousseau@gov.bc.ca>
Subject: Collection notice - Maximus

Dawn,

Prior to a caller reaching a Maximus rep they **will hear** the following three messages:

- During this call service BC may ask for and collect personal Information
- Your call may be recorded for quality assurance and training purposes
- Help us deliver great service by completing a short five question

survey after your call, simply stay on the line after the agent completes the call to participate in the survey.

The agents are also given the following information from the knowledge base to share with callers:

PROTECTING PRIVACY

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Cheers

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Russell Bell

A/Director, Contact Centres

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Cc: Mousseau, Jeff CITZ:EX <Jeff.Mousseau@gov.bc.ca>

Subject: Collection notice - Maximus

Importance: High

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Importance: High

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FIN is looking to finalize the PIA for this project and we are looking for one last piece of information – please see highlight below.

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Thank you in advance,

Dawn Mann

Manager, Divisional Projects

Tel: 250.356.6250

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Sent: Friday, February 1, 2019 4:34 PM

To: Mann, Dawn FIN:EX <Dawn.Mann@gov.bc.ca>; McLaughlin, Heather FIN:EX <Heather.McLaughlin@gov.bc.ca>

Cc: Lovell, Claire FIN:EX <Claire.Lovell@gov.bc.ca>

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I need to include it in the PIA.

Thank you!
Janette Demianchuk
Legislative and Policy Analyst
Property Taxation Branch
Ministry of Finance
778-698-9164

SBC Contact Centre Service Expansion (Speculation Tax) - Project Charter

Project Description This project will support the expansion of existing services provided by the SBC Contact Centre (SBCCC) to allow for the onboarding of the new Speculation Tax. This project will ensure the SBCCC agreement will be in place and that agents have the systems and knowledge base training completed to provide Tier One services for taxpayers seeking information on the new tax and assisting them with the completion of their declaration form online.

Background In Budget 2018, Government announced the introduction of the Speculation Tax on residential property as part of its **30 Point Plan for Housing Affordability in British Columbia**. This tax will target foreign and domestic speculators who own residential property in urban centres of BC, but don't pay taxes, including those who leave their homes sitting vacant. PTB, as part of the Revenue Division is responsible for administering this new tax. Beginning January 2019, 1.7 million letters will be sent out to approximately 1 million properties in British Columbia requiring homeowners to register for the new tax. Onboarding to the SBC Contact Centre will support the large volume of calls expected, resulting in the most efficient and best service possible to all new registrants this year.

Objectives

- Ensure amendments to existing Interim Agreement with SBC meets new service expansion requirements
- Negotiate a fair cost model with SBC and their vendor (MAXIMUS) on behalf of the taxpayers of B.C.
- Ensure new Speculation Tax phone number and email address is in place to support taxpayer inquiries
- Ensure SBCCC agents have the knowledge base and training they require to successfully support taxpayers
- Ensure mechanisms are in place to incorporate feedback from SBCCC agents into website content and communications

In Scope

- Update to Interim Agreement between SBC and Finance
- PIA Initiative Update
- Enablement of existing communication channels available to SBC
 - ◊ Voice/Web chat/SMS text and email (outbound only)
- Development and provision of knowledge base and training materials to SBCCC
- Training of SBCCC agents on knowledge base and systems
- Identification of reporting requirements
 - ◊ Feedback loop to Finance to update FAQ's
 - ◊ Call volumes

Out of Scope

- Support for SBC office locations
- Recruitment of SBCCC agents
- Ongoing operations post project implementation

Critical Success Factors

- New Speculation Tax phone line is in place and SBCCC agents able receive incoming calls and access the new system to support taxpayers by November 30, 2018
- Knowledge base materials and training complete by November 30, 2017 "go live" date.

Connections & Dependencies

- Revenue Transformation Initiative (RTI) system build completion is on time
- Development of knowledge base and training materials by Speculation Tax Implementation project team
- Acquisition of new Speculation Tax phone number and email
- Resource availability (SBC and FIN)
- Legislation receives Royal Assent

Stakeholders

Name	Organization
Jordan Goss	ADM Revenue Division
Steven Emery (Project Sponsor)	PTB
Annual Property Taxation (APT) team	PTB
Louise Lam	PICS (RTI)
Sandra Crowe	PICS (TACS Business Unit)
Public Information Web team	PICS
Information Management Branch	FIN
SBC Transition Team	CITZ
MAXIMUS Transition Team	Vendor

Output Overview

Deliverables*	Targeted Completion
Project Documents Completed (Charter, Risk Register, Work Plan, RASCI, Communications)	Aug 24, 2018
Update existing Interim Agreement to include Speculation Tax program	Sept 14, 2018
IT—Phones, email, system access in place	Oct 15, 2018
Complete a PIA Update Initiative to include Speculation Tax program	Nov 30, 2018
Knowledge Base Delivered	Dec 7, 2018
Training Completed	Jan 15, 2019
Project close-off	Feb 15, 2019
*Refer to Work Plan for detailed outputs.	

Risk Assessment

Risk**	Impact	Probability
s.13		

Project Team

Name/Project Role	Role
Dawn Mann	Project Manager
Keri Taylor	Project Coordinator
Amber Bourbonnais	Communications Lead
Rick Lambrick	IT/Phone Lead
Deborah Brouwer	Policy Lead
Heather McLaughlin	Training Lead
Trisha Kane	Operations Lead

Sponsor Approval (if required) _____ Date _____

Patriarche, Kerry FIN:EX

From: Reading, Liz CITZ:EX
Sent: July 16, 2018 5:12 PM
To: CITZ, Security and Privacy CITZ:EX
Cc: Tailleur, Roger FIN:EX
Subject: SBC Contact Centre PIA/CIPA Status (update from Finance)

Hi Blake,

I finally have some updated information on the PIA/CIPA for SBC/FIN that we've been discussing on and off for quite some time now. I've copied Roger Tailleur as this email as the email information below is from him.

There is a long email string included below, but the email immediately below is the one that has the most current info.

It's good news on the FIN/SBC PIA/CIPA front. However, I ***think*** a SBC CIPA still needs to be drafted to encompass onboarding of all clients, not just Finance.

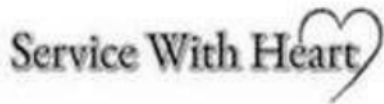
I await your guidance. In the meantime, a big thank you to Roger for all the work on his end.

Liz Reading

Manager, Contract and Stakeholder Relations

Service BC | Ministry of Citizens' Services

250.580.6339 | <http://www.servicebc.gov.bc.ca>



"Access to government services made easy."

From: Tailleur, Roger FIN:EX
Sent: Monday, July 16, 2018 11:44 AM
To: Reading, Liz CITZ:EX
Subject: Further Information - Tier 1 Call Centre PIA/CIPA Status

Hi Liz,

FIN Intergovernmental Relations has confirmed with the Privacy Compliance Training Branch that the new MOU between SBC and FIN (which will cover CIPA language & components) will be signed by both FIN & SBC. It is being written by the FIN Income Tax Advisory and Intergovernmental Relations Branch people (Treana Clarke). As a joint agreement, it will meet CIPA needs, and therefore SBC will not need to have its own CIPA. SBC just needs their separate PIA. This is my understanding Liz.

I have drafted the PIA for PTB and it is with Richard and Pia (FIN's Privacy and Information Security Officers). Please let me know if Blake concurs with this. And let me know if I can help out in any way.

Cheers,

Roger

Roger Tailleir
Policy & Legislative Analyst
Property Taxation Branch
778-698-3878

From: Reading, Liz CITZ:EX
Sent: Friday, July 13, 2018 3:22 PM
To: Tailleir, Roger FIN:EX
Subject: RE: INFORMATION - Tier 1 Call Centre PIA/CIPA Status

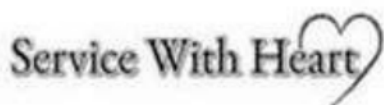
Thanks for the help Roger. I am so new to the PIA world.

I will touch base with Blake again. I had previously discussed a CIPA so he is aware. We just have to resurrect it again.

Let's keep each other in the loop.

Liz Reading

Manager, Contract and Stakeholder Relations
Service BC | Ministry of Citizens' Services
250.580.6339 | <http://www.servicebc.gov.bc.ca>



"Access to government services made easy."

From: Tailleir, Roger FIN:EX
Sent: Friday, July 13, 2018 3:21 PM
To: Reading, Liz CITZ:EX
Subject: RE: INFORMATION - Tier 1 Call Centre PIA/CIPA Status
Importance: High

Hi Liz,

Thanks for the quick response.

- Yes, SBC created the PIA Initiative Update that referred to FIN PIA #16034 (was for the ESIT onboard a couple of years ago) and to SBC 's PIA# MTICS16066 (for your contact centre services).
- Although most things were the same as the prior contract between FIN and ESIT, FIN was still required to do a PIA. And because SBC has the contract with Maximus, and the service is being indirectly provided to FIN, a CIPA is required.
- Yes, I did the PIA for FIN and submitted it to Richard and Pia (FIN's Privacy & Info Security Officers); once they are okay with it, they forward to (I believe) Privacy, Compliance and Training Branch for approval.
- I am not clear on whether SBC is required to do a CIPA as well. I have an email in to Treana and Claire asking that question! I hope to get an answer on Monday. I will let you know.
- I would like to know what Blake thoughts are on the CIPA issue as well, please.

Cheers,

Roger

Roger Tailleir

From: Reading, Liz CITZ:EX
Sent: Friday, July 13, 2018 2:42 PM
To: Tailleir, Roger FIN:EX
Subject: RE: INFORMATION - Tier 1 Call Centre PIA/CIPA Status

Hi Roger,

Thank you for this information. I am quite new to PIAs and CIPAs. Can you confirm if my understanding of this is correct?

- SBC used FINs existing PIA when FIN onboarded to the Contact Centre
- Since FIN updated their systems, they updated their PIAs
- FINs updated PIA will flow through to the Privacy folks (Richard and Pia)

I believe my next steps are to let Blake Speers know about this and to get him started on our CIPA.

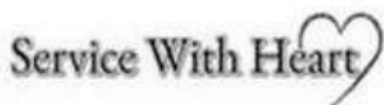
Have I missed anything?

Liz Reading

Manager, Contract and Stakeholder Relations

Service BC | Ministry of Citizens' Services

250.580.6339 | <http://www.servicebc.gov.bc.ca>



"Access to government services made easy."

From: Tailleir, Roger FIN:EX
Sent: Friday, July 13, 2018 12:44 PM
To: Reading, Liz CITZ:EX
Cc: Eason, Jeannette CITZ:EX
Subject: INFORMATION - Tier 1 Call Centre PIA/CIPA Status

Hello Liz,

I just want to inform you that I connected with Treana Clarke & Claire Lovell (FIN Intergovernmental Relations) regarding the need for a CIPA for the Tier 1 Call Centre Initiative. They are working on the new MOU between FIN and SBC; it will contain CIPA language, so that should cover off IPA needs for the project.

I don't think that Richard Barlow and Pia Dewar (FIN privacy/security analysts) are aware of this, so I will let them know. The PTB PIA has been drafted and sent to Richard.

Any questions – or insights – please let me know. Thanks

Roger

Roger Tailleir
Policy & Legislative Analyst

Patriarche, Kerry FIN:EX

From: Dewar, Pia FIN:EX
Sent: July 6, 2018 3:02 PM
To: Tailleir, Roger FIN:EX
Subject: RE: Tier 1 Draft PIA

Hi Roger,

Thank you for sending in this PIA, Richard and I have had a bit of a chat about it. Both of us think that an Integrate Program or Activity may be needed in this instance, given that Maximus is a contractor organized through Citizen Services, and they will be working indirectly for you (as per the PIA details). This PIA still needs to be written, but in tandem with an IPA. Do you know if one is being written, or has been? Perhaps Citizen Services will have one, since they employ Maximus?

Once we have some answers to those questions, we can decide how to proceed. If you have any questions for me in the meantime, please don't hesitate to let me know.

Thank you,

Pia Dewar, MLIS – Privacy & Security Analyst
Ministry of Finance, Corporate Services, Information Management Branch
Supporting Finance, Office of the Premier, various agencies, boards, & commissions
Cell: 778-678-1921

From: Tailleir, Roger FIN:EX
Sent: June 29, 2018 5:05 PM
To: Dewar, Pia FIN:EX
Cc: Barlow, Richard O FIN:EX
Subject: Tier 1 Draft PIA

Hi Pia,

Please find attached the draft PIA for the Ministry of Finance - Service BC/Maximus Tier 1 Call Centre.^{s.22}
^{s.22} . Can we discuss this PIA at some point in mid-July once you have had a chance to review. Thanks very much. Happy Canada Day!

Roger

Roger Tailleir
Policy & Legislative Analyst
Property Taxation Branch
778-698-3878

Patriarche, Kerry FIN:EX

From: Tailleur, Roger FIN:EX
Sent: July 13, 2018 1:14 PM
To: Dewar, Pia FIN:EX
Cc: Barlow, Richard O FIN:EX
Subject: Tier 1 Call Centre Initiative - CIPA

Hello Pia,

Re: Tier 1 Call Centre Initiative

In response to your July 6th email asking whether a CIPA has been/or will be done for the initiative, I have confirmed with Claire Lovell at FIN Intergovernmental Relations that they are preparing an MOU (between FIN and SBC) for this initiative. It will contain CIPA language. Please let me know of any next steps from PTB now that our PIA has been drafted and a CIPA for project is underway.

Thanks,

Roger

Roger Tailleur
Policy & Legislative Analyst
Property Taxation Branch
778-698-3878

From: Tailleur, Roger FIN:EX
Sent: Thursday, July 12, 2018 2:27 PM
To: Dewar, Pia FIN:EX
Cc: Barlow, Richard O FIN:EX
Subject: RE: Tier 1 Draft PIA

Pia and Richard,

Thanks. I have reached out to SBC on the PIA/CIPA. I am waiting to hear back from the right contact at SBC. My understanding to date is that they have done their separate PIA for Tier 1, but not a CIPA. Once I have discussed with SBC and we have discussed further, I will contact you to discuss next steps. Does that sound okay? Hopefully soon!

Roger

Roger Tailleur
Policy & Legislative Analyst
Property Taxation Branch
778-698-3878

From: Dewar, Pia FIN:EX
Sent: Friday, July 6, 2018 3:02 PM
To: Tailleur, Roger FIN:EX
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Roger

Roger Tailleir
Policy & Legislative Analyst
Property Taxation Branch
778-698-3878

Patriarche, Kerry FIN:EX

From: Tailleur, Roger FIN:EX
Sent: July 16, 2018 11:11 AM
To: Lovell, Claire FIN:EX
Subject: RE: Tier 1 - PIA/CIPA Considerations DRAFT

Claire,

Thanks very much. Yes, that now fully answers my questions. Thanks again.

Cheers,

Roger

Roger Tailleur
Policy & Legislative Analyst
Property Taxation Branch
778-698-3878

From: Lovell, Claire FIN:EX
Sent: Monday, July 16, 2018 11:06 AM
To: Tailleur, Roger FIN:EX
Subject: RE: Tier 1 - PIA/CIPA Considerations DRAFT

Hi Roger,

I spoke with a Oliver from the Privacy Compliance Training branch to ensure I am providing the most accurate information we have at this point. The new MOU, which will include the CIPA language and components, will be signed in duplicate by both parties. This will meet the need for the CIPA and therefore SBC will not need to have their own CIPA. However, each party will be required to complete their own separate PIAs.

I hope this answers your question. If you need more information, please let me know.
Thanks,

Claire Lovell
Project Officer, Intergovernmental Relations
Income Tax Advisory and Intergovernmental Relations

From: Tailleur, Roger FIN:EX
Sent: Friday, July 13, 2018 3:13 PM
To: Lovell, Claire FIN:EX
Subject: FW: Tier 1 - PIA/CIPA Considerations DRAFT

Claire,

Given that FIN is including CIPA language in the MOU with SBC, does SBC have to do a CIPA from their end as well? Or is it covered off for both ministries through the MOU?

Thanks.

Roger

Roger Tailleur
Policy & Legislative Analyst
Property Taxation Branch
778-698-3878

From: Tailleur, Roger FIN:EX
Sent: Friday, July 13, 2018 12:17 PM
To: Lovell, Claire FIN:EX
Cc: Clarke, Treana FIN:EX
Subject: RE: Tier 1 - PIA/CIPA Considerations DRAFT

Claire,

Thanks very much Claire. That clears up the status of a CIPA. I will inform Richard B and Pia D of the upcoming MOU with CIPA language. Please let me know if you need any program-specific information for the MOU.

Thanks again.

Roger

Roger Tailleur
Policy & Legislative Analyst
Property Taxation Branch
778-698-3878

From: Lovell, Claire FIN:EX
Sent: Friday, July 13, 2018 11:18 AM
To: Tailleur, Roger FIN:EX
Cc: Clarke, Treana FIN:EX
Subject: RE: Tier 1 - PIA/CIPA Considerations DRAFT

Hi Roger,

Yes, the new MOU between FIN and SBC will be a CIPA and will include CIPA language. I believe the new MOU will include many components of the previous MOU, but will likely have an additional appendix to address the requirements for a CIPA.

I have attached two documents for your reference. One document is a copy of the CIPA, signed 2015, between SBC and SDSI. This document was provided to us as a reference. Please ensure to limit/use caution in any distribution of this agreement. The second document is a template for a CIPA. The template provides the wording for the "Terms of Reference" and list 5 additional pieces to completed.

If you have any other questions, please feel free to reach out to me.
Thanks,

Claire Lovell
Project Officer, Intergovernmental Relations
Income Tax Advisory and Intergovernmental Relations

From: Tailleur, Roger FIN:EX
Sent: Thursday, July 12, 2018 4:06 PM

To: Lovell, Claire FIN:EX
Cc: Clarke, Treana FIN:EX
Subject: Tier 1 - PIA/CIPA Considerations DRAFT

Hi Claire,

s.22 , so I hope it's okay if I discuss this with you.

RE: Tier 1 Call Centre for SBC/PTB

I was informed by Richard Barlow a few months back, that based on his past discussions with Treana and with SBC, that a CIPA would be required for this initiative between Maximus, SBC and PTB.

In preparation for discussion/meeting with SBC, and subsequently with Richard and Pia Dewar, I'm trying to better understand the need for a CIPA. Does the requirement for a CIPA for this initiative come down to the following requirements in the Act and Reg:

- FIPPA requires that information be collected directly from the individual unless the specific criteria (under s. 27(1) apply). In this case FIN is not collecting the personal information directly from the individual - Maximus is collecting directly (under contract for SBC), with FIN under contract with SBC. Therefore the authority for the indirect collection is under s. 27(1)(e), whereby *the collection of the information is necessary for delivering or evaluating a CIPA*.
- S. 12 in Reg states that the written documentation that confirms a program is a CIPA, is a written agreement:
 - signed by the head of each public body/agency through which/or on behalf of the services are provided,
 - or
 - an order by the minister

My understanding is that the SBC PIA for the project does not include CIPA language, and that neither does the interim agreement with SBC that David Seitz is working on.

Will the MOU between FIN and SBC, that you and Treana are working on, include any CIPA language? Do you know of any other CIPAs that might provide insight on wording needed? Any other insights would be appreciated.

Thanks very much!

Roger

Roger Tailleux
Policy & Legislative Analyst
Property Taxation Branch
778-698-3878

Patriarche, Kerry FIN:EX

From: Dewar, Pia FIN:EX
Sent: August 13, 2018 10:02 AM
To: pia intake CITZ:EX
Cc: Tailleur, Roger FIN:EX
Subject: PIA Submission_PTB
Attachments: FIN ##### - PIA_PTB Tier 1 Final Draft_29june2018.doc

Good morning,

Please accept this PIA I'm submitting on behalf of Property Taxation Branch (PTB). This PIA concerns the use of service provider Maximus Canada to operate a Tier 1-level call centre for multiple programs and initiatives. This PIA is being written in conjunction with a CIPA, currently still being worked on.

Thank you,

Pia Dewar, MLIS – Privacy & Security Analyst
Ministry of Finance, Corporate Services, Information Management Branch
Supporting Finance, Office of the Premier, various agencies, boards, & commissions
Cell: 778-678-1921

Patriarche, Kerry FIN:EX

From: Tailleur, Roger FIN:EX
Sent: August 28, 2018 9:16 AM
To: Demianchuk, Janette FIN:EX
Subject: Tier 1 PIA link

Janette,

Here is the link to the Tier 1 PIA; I still have it in with all the other Tier 1 documents. I was going to move it to our PIA folder once approved.

[O:\PTB Administration\400 Planning Performance and Project\40 Cross Government and Administrative Projects\TIER 1\Privacy\Tier 1-Maximus PIA\Key correspondence](#)

Pg 7 in the PIA has the CIPA question.

Roger

Roger Tailleur
Policy & Legislative Analyst, BSF, RPF
Property Taxation Branch
778-698-3878

Patriarche, Kerry FIN:EX

From: Demianchuk, Janette FIN:EX
Sent: September 5, 2018 4:18 PM
To: Tailleir, Roger FIN:EX
Subject: RE: FIN18049 - PTB Tier 1- Revised PIA Submission_PTB

Thanks! That's too bad as you were so close! But I guess not surprising! 😊

From: Tailleir, Roger FIN:EX
Sent: September 5, 2018 4:16 PM
To: Demianchuk, Janette FIN:EX
Subject: FW: FIN18049 - PTB Tier 1- Revised PIA Submission_PTB

Response from PCT. They want the CIPA signed first.

Roger Tailleir

Policy & Legislative Analyst, BSF, RPF

Property Taxation Branch

778-698-3878

From: Lance, Cole CITZ:EX
Sent: Wednesday, September 5, 2018 3:46 PM
To: Tailleir, Roger FIN:EX
Cc: Dewar, Pia FIN:EX; Brouwer, Deborah FIN:EX
Subject: RE: FIN18049 - PTB Tier 1- Revised PIA Submission_PTB

Hi Roger,

Thank you for sending back the revised version, I will send this up to peer review now. If peer review is ok with the file, then the only missing piece will be the CIPA. Once the CIPA is signed, please let me know as the CIPA must be signed before the PIA.

Please let me know if you have any other questions,

Thank you,

Cole

From: Tailleir, Roger FIN:EX
Sent: September 5, 2018 1:35 PM
To: Lance, Cole CITZ:EX <Cole.Lance@gov.bc.ca>; pia intake CITZ:EX <pia.intake@gov.bc.ca>
Cc: Dewar, Pia FIN:EX <Pia.Dewar@gov.bc.ca>; Brouwer, Deborah FIN:EX <Deborah.Brouwer@gov.bc.ca>
Subject: FIN18049 - PTB Tier 1- Revised PIA Submission_PTB

Hello Cole,

Thank you for your prompt review.

Please accept attached PIA# 18049, for Maximus Canada Tier 1-level Call Centre, with your revisions fully accepted. This PIA is being written in conjunction with a CIPA, currently still being worked on.

Please let me know further steps so we may finalize this Pia in near future. Thank you.

Roger

Roger Tailleir

Policy & Legislative Analyst, BSF, RPF

Property Taxation Branch

778-698-3878

From: Dewar, Pia FIN:EX
Sent: Friday, August 31, 2018 1:46 PM
To: Tailleir, Roger FIN:EX
Subject: FW: FIN18049 - PIA Submission_PTB

Good afternoon Roger,

I've taken a look at this PIA draft, and it looks good to me, but as you are the contact for the program area what matters, is how it looks to you. Please review, and if the changes make sense, please agree to them in the draft, and send it back to Cole. We should have this wrapped up soon.

Have a good long weekend,

Pia Dewar, MLIS – Privacy & Security Analyst

Ministry of Finance, Corporate Services, Information Management Branch

Supporting Finance, Office of the Premier, various agencies, boards, & commissions

Cell: 778-678-1921

From: Lance, Cole CITZ:EX

Sent: August 29, 2018 11:38 AM

To: Dewar, Pia FIN:EX <Pia.Dewar@gov.bc.ca>

Subject: RE: FIN18049 - PIA Submission_PTB

Hi Pia,

I've reviewed this PIA and made a few changes for you to review. I changed some of the focus from Service BC to FIN as Service BC won't be signing the PIA. Please let me know your thoughts and we can move forward from there,

Thank you,

Cole

From: pia intake CITZ:EX

Sent: August 13, 2018 3:46 PM

To: Dewar, Pia FIN:EX <Pia.Dewar@gov.bc.ca>

Cc: Tailleir, Roger FIN:EX <Roger.Tailleir@gov.bc.ca>; Lance, Cole CITZ:EX <Cole.Lance@gov.bc.ca>

Subject: FIN18049 - PIA Submission_PTB

Dear Pia,

Thank you for submitting your PIA. **Cole Lance** has been assigned your PIA and your tracking number is **FIN18049**. Please allow up to two weeks for the initial review of your PIA. If you have any questions or are working under a tight deadline, please contact **Cole** directly.

Regards,

Mike Corcoran | Privacy Analyst

Privacy, Compliance and Training Branch

Corporate Information & Records Management | Ministry of Citizens' Services

Ph: 778.698.8174

From: Dewar, Pia FIN:EX

Sent: Monday, August 13, 2018 10:02 AM

To: pia intake CITZ:EX

Cc: Tailleir, Roger FIN:EX

Subject: PIA Submission_PTB

Good morning,

Please accept this PIA I'm submitting on behalf of Property Taxation Branch (PTB). This PIA concerns the use of service provider Maximus Canada to operate a Tier 1-level call centre for multiple programs and initiatives. This PIA is being written in conjunction with a CIPA, currently still being worked on.

Thank you,

Pia Dewar, MLIS – Privacy & Security Analyst

Ministry of Finance, Corporate Services, Information Management Branch

Supporting Finance, Office of the Premier, various agencies, boards, & commissions

Cell: 778-678-1921

Patriarche, Kerry FIN:EX

From: Tailleur, Roger FIN:EX
Sent: December 6, 2018 1:20 PM
To: Demianchuk, Janette FIN:EX
Subject: FW: Tier 1 PIA Status-approved!
Attachments: FIN18049 - PIA_PTB Tier 1 FINAL_5SEPT2018.pdf

Janette,

Just so you know where the Pia is at!

roger

From: Tailleur, Roger FIN:EX
Sent: December 6, 2018 1:19 PM
To: Mann, Dawn FIN:EX
Cc: Brouwer, Deborah FIN:EX
Subject: Tier 1 PIA Status-approved!

Hello Dawn,

Just to let you know that the Tier 1 PIA is now approved (by PCT) and ready to go. It just needs to be signed, but that must occur after the CIPA is approved and signed. So the Pia is ready and waiting. My understanding is that ITB is working on the CIPA.

Cheers,

Roger

Patriarche, Kerry FIN:EX

From: Demianchuk, Janette FIN:EX
Sent: January 28, 2019 1:52 PM
To: Khaira, Kally FIN:EX; Brouwer, Deborah FIN:EX; Tailleux, Roger FIN:EX
Subject: Call Centre Tier 1 PIA

Hello,

Would the program manager for Tier 1 PIA be Kally now? It was going to be Louise Ford.

Kally, to get you up to speed, the privacy branch has agreed to let us add SVT to the Tier 1 PIA since it hadn't been signed yet. Keeps everything cleaner. This is needed so the Service BC Agreement can be signed.

Roger: There is one question I'm hoping you can help me with in the security section. Just check the comments. Thanks!

[O:\PTB R Administration\293 Information and Privacy - Protection of Privacy\60 Privacy Impact Assessments\FIN 18049 Tier 1-Maximus PIA\FIN18049 - PIA PTB Tier 1 Jan 28.doc](#)

Thanks!

Janette Demianchuk
Legislative and Policy Analyst
Property Taxation Branch
Ministry of Finance
☎ 778-698-9164

Patriarche, Kerry FIN:EX

From: Demianchuk, Janette FIN:EX
Sent: February 5, 2019 8:19 AM
To: Brouwer, Deborah FIN:EX; Emery, Steven B FIN:EX
Subject: FW: PIA's used by Service BC

Importance: High

I'll start on the PIA.

18049 has not been signed as it's waiting for the CIPA that ITB is completing. As 18049 had not yet been signed, PCTB agreed for us to amend it to include SVT. This means 18070 (the initiative update) will not be used.

18049 is almost complete other than I'm trying to get the collection notice that is provided to people when they call in as it needs to be included. I'm a bit worried there isn't a collection notice right now. Let me know if you want more information on that. I emailed Kally and Rick about it yesterday. Once I get that information I will resubmit to PCTB for their review and it will get signed once the CIPA is approved.

All PIA's are saved here:

O:\PTB R Administration\293 Information and Privacy - Protection of Privacy\60 Privacy Impact Assessments

From: Goss, Jordan T FIN:EX
Sent: February 4, 2019 6:23 PM
To: Brouwer, Deborah FIN:EX
Cc: Emery, Steven B FIN:EX ; Demianchuk, Janette FIN:EX
Subject: RE: PIA's used by Service BC
Importance: High

Thanks

Just a few questions – where do you keep the final versions of the signed PIAs? Is there a completed version of 18049?

We do need a PIA – similar to 18070 for ESIT (and potentially their subcontractor) to support our SVT calls and we need to have it done immediately so that it isn't holding us up and getting them up and running to answer our calls with us. Thanks.

Jordan Goss
250 387-0665

From: Brouwer, Deborah FIN:EX
Sent: Monday, February 4, 2019 2:14 PM
To: Goss, Jordan T FIN:EX <Jordan.Goss@gov.bc.ca>
Cc: Emery, Steven B FIN:EX <Steven.Emery@gov.bc.ca>; Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>
Subject: RE: PIA's used by Service BC

Hi Jordan – Janette was able to find these. Please let us know if we need an update to 16034.

FIN 16034 – Tier One PIA for ESIT – Sept 2016
FIN 18049 – Tier One PIA for Maximus – Sept 2018
FIN 18070 – Tier One PIA for Maximum SVT – current

From: Goss, Jordan T FIN:EX
Sent: February 4, 2019 1:46 PM
To: Brouwer, Deborah FIN:EX <Deborah.Brouwer@gov.bc.ca>
Cc: Emery, Steven B FIN:EX <Steven.Emery@gov.bc.ca>
Subject: FW: PIA's used by Service BC
Importance: High

Deb

I am hoping that you are able to provide me a copy of the PIAs that we have in place for SVT as well as the PIA referenced below – 16034 so that I can look and see what more we may need to add to cover off ESIT-AS to support us in taking SVT calls. Thanks.

Jordan Goss
250 387-0665

From: Bell, Russell CITZ:EX
Sent: Monday, February 4, 2019 1:27 PM
To: Goss, Jordan T FIN:EX <Jordan.Goss@gov.bc.ca>
Cc: Eason, Jeannette CITZ:EX <Jeannette.Eason@gov.bc.ca>; Mousseau, Jeff CITZ:EX <Jeff.Mousseau@gov.bc.ca>
Subject: PIA's used by Service BC

Jordan,
SBC uses PIA MTIC 16066 and CITZ 18043 to support this process.
CITZ 18043 describes - Ownership of tier One Call centre for Property Tax is with Maximus

MTIC 16066 – describes - SBC Contact Centre agents would provide citizens Tier 1 support for the PayBC's applications.
"The SBC Contact centre already collected person information as necessary to assist callers with queries and it is not necessary to collect further detailed information about the citizen's PAYBC usage needs."

Both PIA's for SBC are light on detail as they reference FIN #16034 as the overriding authority for action.

Please use this PIA as the basis for further action.

Cheers
RB

Russell Bell
A/Director, Contact Centres
Service BC
Ministry of Citizens' Services

T: 250 952 6854 | M: 250-507-9572 | Web: <http://www.servicebc.gov.bc.ca>
"Access to government services made easy"



Where ideas work

2018

10 Best Places to Work

Patriarche, Kerry FIN:EX

From: Brouwer, Deborah FIN:EX
Sent: February 7, 2019 1:27 PM
To: Demianchuk, Janette FIN:EX
Subject: FW: Ministry of Finance - Speculation Tax Contact Center Call Flow
Attachments: Ministry of Finance - Speculation Tax Contact Center Call Flow.docx

FYI this is interesting

From: Lambrick, Rick D FIN:EX
Sent: February 7, 2019 12:12 PM
To: Brouwer, Deborah FIN:EX
Cc: Graboski, Anne FIN:EX ; McLaughlin, Heather FIN:EX
Subject: FW: Ministry of Finance - Speculation Tax Contact Center Call Flow

Lou Strobl from ICIO did this doc drawing out the call flow.

Rick

Patriarche, Kerry FIN:EX

From: Demianchuk, Janette FIN:EX
Sent: February 12, 2019 6:43 AM
To: Brouwer, Deborah FIN:EX
Subject: FW: CIPA- SBC and FIN - pia_initiative_update - 11 Feb 2019 JD
Attachments: CIPA- SBC and FIN - pia_initiative_update - 11 Feb 2019 JD -CL Response.doc

Hi,
If you get a chance can you please review the comments in this PIA? I didn't think RMS was used for spec tax? I need to add to the maximus PIA though if it is needed.

Thanks,
Janette

From: Lovell, Claire FIN:EX
Sent: February 11, 2019 4:33 PM
To: Demianchuk, Janette FIN:EX
Subject: RE: CIPA- SBC and FIN - pia_initiative_update - 11 Feb 2019 JD

Hi Janette,

I have provided some responses to your comments in the attached PIA.

When will you be able to share the revised Call Centre PIA?

Thanks,

Claire Lovell
Project Officer, Intergovernmental Relations
Income Tax Advisory and Intergovernmental Relations

From: Demianchuk, Janette FIN:EX
Sent: February 11, 2019 1:32 PM
To: Lovell, Claire FIN:EX <Claire.Lovell@gov.bc.ca>
Subject: CIPA- SBC and FIN - pia_initiative_update - 11 Feb 2019 JD

Hi,
My comments included (this is on your Friday's version).

Let me know if you want to discuss. 😊

Thanks!
Janette

Patriarche, Kerry FIN:EX

From: Barlow, Richard O FIN:EX
Sent: February 14, 2019 2:26 PM
To: Demianchuk, Janette FIN:EX
Subject: RE: FIN18049 - PIA_PTB Tier 1 - Feb 14

14. Please describe any access controls and/or ways in which you will limit or restrict unauthorized changes (such as additions or deletions) to personal information.

FIN has provided SBC/Maximus with knowledge base scripts that identify strict procedures and circumstances whereby changes to personal information can be made. An electronic monitoring process will continually track the use of Gentax (TACS), RMS-CRM, TDA, and eTax by SBC/Maximus agents to ensure unauthorized changes to personal information are not made.^{s.13}

s.13

15. Please describe how you track who has access to the personal information.

Only agents requiring the use of FIN systems as part of their duties have password-protected access. Systems have audit logging and access restrictions that will record who accessed the system, at the account level, and when^{s.13}

From: Demianchuk, Janette FIN:EX
Sent: February 14, 2019 1:53 PM
To: Barlow, Richard O FIN:EX
Subject: FIN18049 - PIA_PTB Tier 1 - Feb 14

Hi Richard,

Are you able to look at #14 and #15? (Or all of them if you think?) This is the PIA that Roger did ages ago but was waiting for the CIPA before it would get signed. PCTB agreed for me to add Spec Tax into it by tracking changes. I'm just reviewing it all and based on feedback you gave me on some of my other PIAs I'm wondering if #14 and #15 are ok.

Thanks!
Janette

Patriarche, Kerry FIN:EX

From: Demianchuk, Janette FIN:EX
Sent: February 14, 2019 8:39 AM
To: Bennett, Kymbralee FIN:EX
Cc: Brouwer, Deborah FIN:EX
Subject: RE: RMS use with SVT
Attachments: CIPA- SBC and FIN - pia_initiative_update - 11 Feb 2019 JD -CL Response.doc

Thanks Kymbralee.

I'm including the PIA so you can see where it's referenced and what it's used for. If you can look on page 4 please. Thank you!

From: Bennett, Kymbralee FIN:EX
Sent: February 13, 2019 4:49 PM
To: Demianchuk, Janette FIN:EX
Cc: Brouwer, Deborah FIN:EX
Subject: RE: RMS use with SVT

Hi,

Will look into this tomorrow. I believe they may be referring to RAPM not RMS. Whoever it is that told you that.?

Ky

From: Demianchuk, Janette FIN:EX
Sent: February 13, 2019 4:24 PM
To: Bennett, Kymbralee FIN:EX <Kymbralee.Bennett@gov.bc.ca>
Cc: Brouwer, Deborah FIN:EX <Deborah.Brouwer@gov.bc.ca>
Subject: RMS use with SVT

Hi Kymbralee,

Can you tell me if RMS is used for Spec Tax at all? I was told it was used to record the transactions completed (revenue and non-revenue). I'm not convinced. Can you help?

Thanks!

Janette Demianchuk
Legislative and Policy Analyst
Property Taxation Branch
Ministry of Finance
☎ 778-698-9164

Lovell, Claire FIN:EX

From: Krasnick, Jeffrey S FIN:EX
Sent: April 24, 2019 2:04 PM
To: Clarke, Treana FIN:EX
Subject: FW: Update: Service BC/FIN agreement

Thanks

Jeffrey S. Krasnick, CPA, CA
Director, Income Tax Advisory and Intergovernmental Relations
Income Taxation Branch
Ministry of Finance
Email: jeffrey.krasnick@gov.bc.ca
Phone: *** NEW 778-698-9667
website: www.gov.bc.ca/fin

From: Camilleri, Francis FIN:EX
Sent: February 11, 2019 3:34 PM
To: Krasnick, Jeffrey S FIN:EX <Jeffrey.Krasnick@gov.bc.ca>
Subject: RE: Update: Service BC/FIN agreement

Thanks Jeffrey

Francis Camilleri
778-698-1793

From: Krasnick, Jeffrey S FIN:EX
Sent: February 11, 2019 3:01 PM
To: Camilleri, Francis FIN:EX <Francis.Camilleri@gov.bc.ca>
Subject: FW: Update: Service BC/FIN agreement

FYI.

We are doing our best to assist PTB but responses from them are taking time.

Thanks

Jeffrey S. Krasnick, CPA, CA
Director, Income Tax Advisory and Intergovernmental Relations
Income Taxation Branch
Ministry of Finance
Email: jeffrey.krasnick@gov.bc.ca
Phone: *** NEW 778-698-9667
website: www.gov.bc.ca/fin

From: Clarke, Treana FIN:EX
Sent: February 11, 2019 12:45 PM
To: Krasnick, Jeffrey S FIN:EX <Jeffrey.Krasnick@gov.bc.ca>
Subject: Update: Service BC/FIN agreement

Hi Jeffrey,

As discussed, I had a call earlier this morning with Jordan and the Property Taxation Branch to discuss the status of the Service BC/FIN agreement and related privacy impact assessments. We have been working on a re-write of the Service BC/FIN agreement to capture three significant Revenue Division changes:

- Service BC access to Gentax for home owner grant and rural property tax (new as of February 2017);
- Service BC providing service on behalf of the Revenue Division on the speculation and vacancy tax, via front counter and call centre as of January 2019, and
- bringing in the pieces that Revenue Solutions Branch has with Service BC since their agreement is outdated and required modernizing.

The new Service BC/FIN agreement is considered a Common or Integrated Program Agreement (CIPA) under the *Freedom of Information and Protection of Privacy Act* and will therefore need to be signed at the Deputy Minister level.

Currently, the draft agreement is with the director at Service BC for review. I have sent a note to the director asking when she will be providing her feedback on the draft. Claire is working closely with PTB on the necessary privacy impact assessments to ensure they align. Our PIA covers the front counter service aspect and PTB's PIA covers the call centre. PTB has indicated that all spec tax related PIAs are having to go through Tax Policy Branch. We may get caught in this.

Claire is essentially working full time on this agreement and is doing a great job keeping up with all of PTB's requirements/changes.

Please let me know if you have any questions or wish to discuss.

Thanks,
Treana

Lovell, Claire FIN:EX

From: Lance, Cole CITZ:EX
Sent: March 6, 2019 3:25 PM
To: Lovell, Claire FIN:EX
Cc: Dewar, Pia FIN:EX; Clarke, Treana FIN:EX; Demianchuk, Janette FIN:EX
Subject: RE: PIA FIN18049

Hi Claire,

Once the CIPA is ready I will assist in getting the PIA and CIPA submitted to the OIPC for review. This requirement for the OIPC review is a result of the CIPA being required and stems from section 69 (5.2) of FOIPPA. Please keep me informed and we will move forward from there, and let me know if you have any questions in the meantime,

Thank you,
Cole

From: Lovell, Claire FIN:EX
Sent: March 6, 2019 10:30 AM
To: Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>
Cc: Lance, Cole CITZ:EX <Cole.Lance@gov.bc.ca>; Dewar, Pia FIN:EX <Pia.Dewar@gov.bc.ca>; Clarke, Treana FIN:EX <Treana.Clarke@gov.bc.ca>
Subject: RE: PIA FIN18049

Hi Janette,

Treana and I have a meeting with Jordan this afternoon to discuss the CIPA. I will provide a follow-up later today. In regards to notifying OIPC, we were under the impression that if a PIA needed to be reviewed by OIPC, that PCT would elevate the PIA. This is our first CIPA, so if this is not the practice, please advise.

Thanks,

Claire Lovell

Project Officer, Intergovernmental Relations
Income Tax Advisory and Intergovernmental Relations

From: Demianchuk, Janette FIN:EX
Sent: March 6, 2019 9:09 AM
To: Lovell, Claire FIN:EX <Claire.Lovell@gov.bc.ca>
Cc: Lance, Cole CITZ:EX <Cole.Lance@gov.bc.ca>; Dewar, Pia FIN:EX <Pia.Dewar@gov.bc.ca>; Clarke, Treana FIN:EX <Treana.Clarke@gov.bc.ca>
Subject: FW: PIA FIN18049

Hi Claire,

Are you able to provide Cole an update on the CIPA? – and any updates related to the OIPC?

Thanks!
Janette

From: Lance, Cole CITZ:EX
Sent: March 6, 2019 9:00 AM
To: Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>; Dewar, Pia FIN:EX <Pia.Dewar@gov.bc.ca>
Subject: RE: PIA FIN18049

Hi Janette and Pia,

I just wanted to check in to see how the CIPA was coming along. In reviewing PIA# FIN19013 I noticed it referenced FIN18049 and the CIPA. I also noticed that there hasn't been any discussion about the CIPA going through the OIPC for review. Pia, are you aware of progress made with the OIPC reviewing this CIPA? My apologies if I'm missing something, I just wanted to check in and see if we should be taking steps in that direction now in addition to reviewing FIN19013 and signing FIN18049.

Please let me know your thoughts and we can go from there,
Thank you,
Cole

Cole Lance (he/him)
Privacy Advisor
Privacy, Compliance and Training Branch
(778) 698-5837

From: Demianchuk, Janette FIN:EX
Sent: February 22, 2019 12:09 PM
To: Lance, Cole CITZ:EX <Cole.Lance@gov.bc.ca>
Cc: Lovell, Claire FIN:EX <Claire.Lovell@gov.bc.ca>
Subject: RE: PIA FIN18049

Thanks very much Cole.

I'm attaching the version I have now saved with the fixed signature page at the end. I'll let you know as soon as the CIPA is signed.

Thanks for your support on this one!

Janette

From: Lance, Cole CITZ:EX
Sent: February 22, 2019 10:34 AM
To: Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>
Subject: RE: PIA FIN18049

Hi Janette,

These changes look good to me! I see you left a comment noting that you are going to update the signature page, I've attached a clean version here. Please let me know when the CIPA is signed and we will get this PIA signed off after that.

Cheers,
Cole

Cole Lance (he/him)

From: Demianchuk, Janette FIN:EX
Sent: February 15, 2019 11:02 AM
To: Lance, Cole CITZ:EX <Cole.Lance@gov.bc.ca>
Cc: Lovell, Claire FIN:EX <Claire.Lovell@gov.bc.ca>; Dewar, Pia FIN:EX <Pia.Dewar@gov.bc.ca>; Barlow, Richard O FIN:EX <Richard.Barlow@gov.bc.ca>; Brouwer, Deborah FIN:EX <Deborah.Brouwer@gov.bc.ca>
Subject: PIA FIN18049

Hi Cole,

Updated version for your review please.

Thanks!
Janette

From: Demianchuk, Janette FIN:EX
Sent: February 11, 2019 12:05 PM
To: Lance, Cole CITZ:EX <Cole.Lance@gov.bc.ca>
Subject: RE: PIA FIN18070 and PIA FIN18049
Importance: High

Hi Cole,

As you may know, we are currently working on a PIA for ESIT-AS to answer spec tax calls as well, so it is similar to the 18049 PIA. Some things came up on the weekend that will also need to be reflected on the 18049 PIA that is with you for review. Can you please hold off on reviewing and I'll send you an updated version. Sorry!

From: Demianchuk, Janette FIN:EX
Sent: February 6, 2019 4:12 PM
To: Lance, Cole CITZ:EX <Cole.Lance@gov.bc.ca>
Cc: Tailleir, Roger FIN:EX <Roger.Tailleir@gov.bc.ca>; Dewar, Pia FIN:EX <Pia.Dewar@gov.bc.ca>; Barlow, Richard O FIN:EX <Richard.Barlow@gov.bc.ca>; Bouchard, Jessica CITZ:EX <Jessica.Bouchard@gov.bc.ca>; Brouwer, Deborah FIN:EX <Deborah.Brouwer@gov.bc.ca>
Subject: RE: PIA FIN18070 and PIA FIN18049

Hi Cole,

Attached is the updated, with tracked changes, FIN18049.

Please let me know of any questions.

Thanks!

Janette

From: Lance, Cole CITZ:EX
Sent: January 28, 2019 11:16 AM
To: Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>; Bouchard, Jessica CITZ:EX

<Jessica.Bouchard@gov.bc.ca>

Cc: Tailleux, Roger FIN:EX <Roger.Tailleux@gov.bc.ca>; Dewar, Pia FIN:EX <Pia.Dewar@gov.bc.ca>; Barlow, Richard O FIN:EX <Richard.Barlow@gov.bc.ca>

Subject: RE: PIA FIN18070 and PIA FIN18049

Hello Janette,

Thank you for reaching out about updating FIN18049. I'm on-board and I'll keep an eye out for an updated version of FIN18049 with track changes to be coming my way. Please let me know if you have any other questions,

Cheers,
Cole

Cole Lance (he/him)
Privacy Advisor
Privacy, Compliance and Training Branch
(778) 698-5837

From: Demianchuk, Janette FIN:EX

Sent: January 25, 2019 3:26 PM

To: Bouchard, Jessica CITZ:EX <Jessica.Bouchard@gov.bc.ca>; Lance, Cole CITZ:EX <Cole.Lance@gov.bc.ca>

Cc: Tailleux, Roger FIN:EX <Roger.Tailleux@gov.bc.ca>; Dewar, Pia FIN:EX <Pia.Dewar@gov.bc.ca>; Barlow, Richard O FIN:EX <Richard.Barlow@gov.bc.ca>

Subject: PIA FIN18070 and PIA FIN18049

Hi Jessica and Cole,

As you are probably aware, there is a lot of scrutiny being put on the new speculation and vacancy tax. FIN18070 and FIN18049 have both been reviewed by PCTB, however have not been signed off yet as we are waiting for the CIPA to be completed. I am wondering if we could please update FIN18049 with the information that is in FIN18070 (the initiative update) and expand on the TACS system access that is already in FIN18049? This will help us close some gaps we recently identified when finalizing the CIPA. Can you please let me know at your earliest convenience if you agree to this process, and I will update the FIN18049 with tracked changes.

Feel free to call me with any questions.

Thanks very much,

Janette Demianchuk
Legislative and Policy Analyst
Property Taxation Branch
Ministry of Finance
☎ 778-698-9164

Lovell, Claire FIN:EX

From: Clarke, Treana FIN:EX
Sent: February 17, 2019 4:14 PM
To: Lovell, Claire FIN:EX
Subject: RE: CIPA- SBC and FIN - pia_initiative_update - 11 Feb 2019 JD

Hi Claire,

I've finished my review of the Service BC PIA. I wasn't able to forward along to Pia since I had some questions that we needed to sort out and I didn't get a chance to sort them out myself on Friday.

I think it is really close though. Once you've take a look, let's chat. My version is 1.4 in the same folder as yours.

Thanks,

Treana

From: Clarke, Treana FIN:EX
Sent: February 12, 2019 11:44 AM
To: Lovell, Claire FIN:EX <Claire.Lovell@gov.bc.ca>
Subject: RE: CIPA- SBC and FIN - pia_initiative_update - 11 Feb 2019 JD

I will take a look at these this afternoon.

From: Lovell, Claire FIN:EX
Sent: February 12, 2019 11:37 AM
To: Clarke, Treana FIN:EX <Treana.Clarke@gov.bc.ca>
Subject: FW: CIPA- SBC and FIN - pia_initiative_update - 11 Feb 2019 JD

Hi Treana,

Due to the increased attention on the SBC PIAs, I thought I would share these versions with you. FIN19011 is for ESIT and is partially signed, while FIN18049, the Call Centre PIA, is still a draft. I asked Janette to confirm if either PIA has been reviewed by Tax Policy,^{s.22}

Also, I have made some revisions to the Front Counter PIA. It is [here](#) if you wanted to take a look.

Let me know if you have any questions.

Claire Lovell
Project Officer, Intergovernmental Relations
Income Tax Advisory and Intergovernmental Relations

From: Demianchuk, Janette FIN:EX
Sent: February 12, 2019 6:32 AM
To: Lovell, Claire FIN:EX <Claire.Lovell@gov.bc.ca>
Subject: RE: CIPA- SBC and FIN - pia_initiative_update - 11 Feb 2019 JD

Hi Claire,

s.22

and ran out of time to update the call centre PIA. I'm attaching the ESIT one that was is mostly signed which is what I'm going to be basing the updates on if that helps. I'm also sending the maximus PIA so you can see where it is at right now. I'm hoping to get it updated tomorrow.

Thanks,
Janette

From: Lovell, Claire FIN:EX
Sent: February 11, 2019 4:33 PM
To: Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>
Subject: RE: CIPA- SBC and FIN - pia_initiative_update - 11 Feb 2019 JD

Hi Janette,

I have provided some responses to your comments in the attached PIA.

When will you be able to share the revised Call Centre PIA?

Thanks,

Claire Lovell
Project Officer, Intergovernmental Relations
Income Tax Advisory and Intergovernmental Relations

From: Demianchuk, Janette FIN:EX
Sent: February 11, 2019 1:32 PM
To: Lovell, Claire FIN:EX <Claire.Lovell@gov.bc.ca>
Subject: CIPA- SBC and FIN - pia_initiative_update - 11 Feb 2019 JD

Hi,
My comments included (this is on your Friday's version).

Let me know if you want to discuss. 😊

Thanks!
Janette

Lovell, Claire FIN:EX

From: Demianchuk, Janette FIN:EX
Sent: February 14, 2019 2:52 PM
To: Lovell, Claire FIN:EX
Subject: FW: FIN18049 - PIA_PTB Tier 1 - Feb 14

This is the update I got from him...

From: Barlow, Richard O FIN:EX
Sent: February 14, 2019 2:26 PM
To: Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>
Subject: RE: FIN18049 - PIA_PTB Tier 1 - Feb 14

14. Please describe any access controls and/or ways in which you will limit or restrict unauthorized changes (such as additions or deletions) to personal information.

FIN has provided SBC/Maximus with knowledge base scripts that identify strict procedures and circumstances whereby changes to personal information can be made. An electronic monitoring process will continually track the use of Gentax (TACS), RMS-CRM, TDA, and eTax by SBC/Maximus agents to ensure unauthorized changes to personal information are not made.^{s.13}

15. Please describe how you track who has access to the personal information.

Only agents requiring the use of FIN systems as part of their duties have password-protected access. Systems have audit logging and access restrictions that will record who accessed the system, at the account level, and when.^{s.13}

From: Demianchuk, Janette FIN:EX
Sent: February 14, 2019 1:53 PM
To: Barlow, Richard O FIN:EX <Richard.Barlow@gov.bc.ca>
Subject: FIN18049 - PIA_PTB Tier 1 - Feb 14

Hi Richard,

Are you able to look at #14 and #15? (Or all of them if you think?) This is the PIA that Roger did ages ago but was waiting for the CIPA before it would get signed. PCTB agreed for me to add Spec Tax into it by tracking changes. I'm just reviewing it all and based on feedback you gave me on some of my other PIAs I'm wondering if #14 and #15 are ok.

Thanks!
Janette

Lovell, Claire FIN:EX

From: Lovell, Claire FIN:EX
Sent: February 11, 2019 10:43 AM
To: Clarke, Treana FIN:EX
Subject: FW: Collection notice - Maximus

FYI

Claire Lovell

Project Officer, Intergovernmental Relations
Income Tax Advisory and Intergovernmental Relations

From: Demianchuk, Janette FIN:EX
Sent: February 6, 2019 3:49 PM
To: Khaira, Kally FIN:EX <Kally.Khaira@gov.bc.ca>; Brouwer, Deborah FIN:EX <Deborah.Brouwer@gov.bc.ca>
Cc: Mann, Dawn FIN:EX <Dawn.Mann@gov.bc.ca>; Lovell, Claire FIN:EX <Claire.Lovell@gov.bc.ca>; Lambrick, Rick D FIN:EX <Rick.Lambrick@gov.bc.ca>
Subject: RE: Collection notice - Maximus

Sounds good. Should I send it to Richelle?

From: Khaira, Kally FIN:EX
Sent: February 6, 2019 2:07 PM
To: Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>; Brouwer, Deborah FIN:EX <Deborah.Brouwer@gov.bc.ca>
Cc: Mann, Dawn FIN:EX <Dawn.Mann@gov.bc.ca>; Lovell, Claire FIN:EX <Claire.Lovell@gov.bc.ca>; Lambrick, Rick D FIN:EX <Rick.Lambrick@gov.bc.ca>
Subject: RE: Collection notice - Maximus

We have been involving GCPE on any suggested wording we would like on the lines and emails. We might need to run this by them too.

Kally Khaira
Director, Annual Property Tax
t: 778.698.9536 | c: 250.893.7102

From: Demianchuk, Janette FIN:EX
Sent: February 6, 2019 1:51 PM
To: Brouwer, Deborah FIN:EX <Deborah.Brouwer@gov.bc.ca>
Cc: Mann, Dawn FIN:EX <Dawn.Mann@gov.bc.ca>; Lovell, Claire FIN:EX <Claire.Lovell@gov.bc.ca>; Khaira, Kally FIN:EX <Kally.Khaira@gov.bc.ca>; Lambrick, Rick D FIN:EX <Rick.Lambrick@gov.bc.ca>
Subject: RE: Collection notice - Maximus

Hi Deb,

As discussed, if the following collection notice could be included for Maximus SVT calls, it would ensure we are FOIPPA compliant. I am going to include the information in the Service BC PIA for Tier 1 to keep it moving.

Your personal information may be collected for the purpose of administering the Speculation and Vacancy Tax Act under the authority of 26(a) and 26(c) of the Freedom of Information and Protection of Privacy Act. Questions about the collection of this information can be directed to the Director, Annual Property Tax, Ministry of Finance, PO Box 9472 Stn Prov Govt, Victoria BC V8W 9W6 or by phone at 778-698-9536.

From: Demianchuk, Janette FIN:EX

Sent: February 6, 2019 8:58 AM

To: Khaira, Kally FIN:EX <Kally.Khaira@gov.bc.ca>; Lambrick, Rick D FIN:EX <Rick.Lambrick@gov.bc.ca>

Cc: Mann, Dawn FIN:EX <Dawn.Mann@gov.bc.ca>; Lovell, Claire FIN:EX <Claire.Lovell@gov.bc.ca>; Brouwer, Deborah FIN:EX <Deborah.Brouwer@gov.bc.ca>

Subject: RE: Collection notice - Maximus

Hi,

s.13

From: Khaira, Kally FIN:EX

Sent: February 5, 2019 9:59 PM

To: Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>; Lambrick, Rick D FIN:EX <Rick.Lambrick@gov.bc.ca>

Cc: Mann, Dawn FIN:EX <Dawn.Mann@gov.bc.ca>

Subject: RE: Collection notice - Maximus

Janette,

From what I know, we do not put any information the lines about FOIPPA, other than we may collect their personal information.

ty

Kally Khaira
Director, Annual Property Tax

From: Demianchuk, Janette FIN:EX
Sent: February 4, 2019 3:27 PM
To: Khaira, Kally FIN:EX <Kally.Khaira@gov.bc.ca>; Lambrick, Rick D FIN:EX <Rick.Lambrick@gov.bc.ca>
Cc: Mann, Dawn FIN:EX <Dawn.Mann@gov.bc.ca>
Subject: FW: Collection notice - Maximus

Hi Kally and Rick,

Do you have any information on the collection notice that individuals should hear when they call into the call centre? It seems it's not on the Maximus line, but perhaps it's on some other line that individuals may hear (I'm hoping!)? See emails below.

Thanks,
Janette

From: Mann, Dawn FIN:EX
Sent: February 4, 2019 3:15 PM
To: Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>
Subject: Re: Collection notice - Maximus

I'm not sure this is in line with what was discussed originally - it should be the same as RPT messaging.

Check in with Rick and Kally on this as queue messaging is not my area of expertise. We may need to include Service BC on this as well as they hold the contract with this vendor.

Dawn

Sent from my iPhone

On Feb 4, 2019, at 3:12 PM, Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca> wrote:

s.13

I'm surprised it hasn't come up before. Do you know any history on it? If not, I'll chat with Kally about it.

From: Mann, Dawn FIN:EX
Sent: February 4, 2019 3:09 PM
To: Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>
Subject: Fwd: Collection notice - Maximus

Hi Janette,

Is this workable for you?

Dawn

Sent from my iPhone

Begin forwarded message:

From: "Bell, Russell CITZ:EX" <Russell.Bell@gov.bc.ca>

Date: February 4, 2019 at 3:06:49 PM PST

To: "Mann, Dawn FIN:EX" <Dawn.Mann@gov.bc.ca>, "Mousseau, Jeff CITZ:EX" <Jeff.Mousseau@gov.bc.ca>

Subject: Collection notice - Maximus

Dawn,

Prior to a caller reaching a Maximus rep they **will hear** the following three messages:

- During this call service BC may ask for and collect personal Information
- Your call may be recorded for quality assurance and training purposes
- Help us deliver great service by completing a short five question survey after your call, simply stay on the line after the agent completes the call to participate in the survey.

The agents are also given the following information from the knowledge base to share with callers:

PROTECTING PRIVACY

1. Why do I have to provide my social insurance number (SIN)? What is the government going to do with it?

- By collecting your SIN the B.C. government will be able to connect **property ownership** with **income tax data**.
- This will allow us to find satellite families or people who live in B.C. but pay little to no tax in B.C. or Canada.
- By providing your SIN you are helping ensure that everyone is paying their fair share of tax.

2. What if I don't want to provide my SIN? Can I still complete the declaration?

- No. If you are a Canadian, **you must provide your SIN to complete the declaration and claim your exemption**.
- Individuals who do not have a SIN will also be asked to provide an identifying number, such as their Business Number, their Canada Revenue Agency account number and a provincial nomination number.
- If you don't provide your SIN or another accepted identification number, **you won't be able to complete your declaration** **you will receive a tax notice of tax owing in March** – even if you are eligible for an exemption.
- **There will be no exceptions.**

3. How is the government protecting my privacy and taxpayer confidentiality?

- As with all taxpayer information, the B.C. government takes information privacy very seriously.
- The protection and confidentiality of taxpayer information are established through tax law.
- Individuals who violate the confidentiality under the law can face penalties such as fines and imprisonment.
- The online application, eTax, is secure and approved to protect taxpayer information.

Cheers

RB

Russell Bell

A/Director, Contact Centres

Service BC

Ministry of Citizens' Services

T: 250 952 6854 | M: 250-507-9572 | Web: <http://www.servicebc.gov.bc.ca>

"Access to government services made easy"

<image002.jpg>

From: Bell, Russell CITZ:EX
Sent: February 4, 2019 1:47 PM
To: Mann, Dawn FIN:EX <Dawn.Mann@gov.bc.ca>
Cc: Mousseau, Jeff CITZ:EX <Jeff.Mousseau@gov.bc.ca>
Subject: Collection notice - Maximus
Importance: High

Dawn,
I will investigate and provide you answer before noon tomorrow. I just want to check one thing with Maximus first.

Cheers
RB

Russell Bell
A/Director, Contact Centres
Service BC
Ministry of Citizens' Services
T: 250 952 6854 | M: 250-507-9572 | Web: <http://www.servicebc.gov.bc.ca>
"Access to government services made easy"
<image004.jpg>

From: Mann, Dawn FIN:EX
Sent: February 2, 2019 1:15 PM
To: Mousseau, Jeff CITZ:EX <Jeff.Mousseau@gov.bc.ca>; Duncan, Peggy CITZ:EX <Peggy.Duncan@gov.bc.ca>
Cc: Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>; McLaughlin, Heather FIN:EX <Heather.McLaughlin@gov.bc.ca>
Subject: FW: collection notice - Maximus
Importance: High

Good afternoon,

FIN is looking to finalize the PIA for this project and we are looking for one last piece of information – please see highlight below.

As this is time sensitive, can we have this back by midday Monday, February 5th, 2019?

Thank you in advance,

Dawn Mann
Manager, Divisional Projects
Tel: 250.356.6250

From: Demianchuk, Janette FIN:EX
Sent: Friday, February 1, 2019 4:34 PM
To: Mann, Dawn FIN:EX <Dawn.Mann@gov.bc.ca>; McLaughlin, Heather FIN:EX
<Heather.McLaughlin@gov.bc.ca>
Cc: Lovell, Claire FIN:EX <Claire.Lovell@gov.bc.ca>
Subject: collection notice - Maximus

Hi Dawn and Heather,

Do either of you happen to have access to what the collection notice says on the service bc phone line (Maximus) when someone calls in? I'm assuming there is one. It would be similar to "This information is collected under the authority of section 26(c) of FOIPPA. If you have questions about why your information is being collected, please contact....."

I need to include it in the PIA.

Thank you!

Janette Demianchuk
Legislative and Policy Analyst
Property Taxation Branch
Ministry of Finance
☎ 778-698-9164

Lovell, Claire FIN:EX

From: Lovell, Claire FIN:EX
Sent: February 11, 2019 8:56 AM
To: Clarke, Treana FIN:EX
Subject: SBC PIA update

Hi Treana,

Service BC (SBC) and Revenue Division CIPA

2 PIAs:

1. Call Centre PIA: PTB
2. Front Counter PIA: ITB

Front Counter PIA Contemplates:

- new Speculation and Vacancy Tax
- SBC access to TACS for HOG, PTT and RPT
- On boarding of RSB programs into the agreement – these services were already provided, but were under a different agreement
 - Ambulance Services fees
 - Medical Services Plan (MSP) premiums
 - BC Student Loans (customer referred to CATS terminal)
 - Court Fines
 - Employment and Assistance overpayments
 - Fair PharmaCare premiums or overpayments

Status:

Front Counter PIA Status: drafted and with PTB (Janette) and RSB (Callum) for review.

- Callum - reviewing today.
- Janette – haven't heard back yet.

Next steps: Treana to review, then formatting

Agreement status: with SBC for review

Claire Lovell

Project Officer, Intergovernmental Relations
Income Tax Advisory and Intergovernmental Relations
Income Taxation Branch
Ministry of Finance
Phone: 778 698-9665

Lovell, Claire FIN:EX

From: Clarke, Treana FIN:EX
Sent: February 11, 2019 8:07 AM
To: Lovell, Claire FIN:EX
Subject: RE: Service bc pia

It doesn't look like Janette is going to the meeting so for now I won't ask you to come along.

-----Original Message-----

From: Clarke, Treana FIN:EX
Sent: February 11, 2019 6:25 AM
To: Lovell, Claire FIN:EX <Claire.Lovell@gov.bc.ca>
Subject: Service bc pia

I've been invited to a meeting to discuss the service bc pia with ptb folks.

Can you give me a couple of bullets on where things are at and when you anticipate it being ready to go to pct?

I'll also look to see if you join the meeting as well.

Sent from my iPhone

Lovell, Claire FIN:EX

From: Borrows, Erin CITZ:EX
Sent: February 6, 2019 7:21 AM
To: Lovell, Claire FIN:EX
Subject: ANSWER: Request for info in PIA for CC/FIN

Hi Claire,

Jeff Mousseau provided me some info related to PIAS and collection notices.

<The info below is part of an email sent from Russell Bell (Director, Contact Centres) to Dawn Mann>

Prior to a caller reaching a Maximus rep they **will hear** the following three messages:

- During this call service BC may ask for and collect personal Information
- Your call may be recorded for quality assurance and training purposes
- Help us deliver great service by completing a short five question survey after your call, simply stay on the line after the agent completes the call to participate in the survey.

The agents are also given the following information from the knowledge base to share with callers:

PROTECTING PRIVACY

1. Why do I have to provide my social insurance number (SIN)? What is the government going to do with it?

- By collecting your SIN the B.C. government will be able to connect **property ownership** with **income tax data**.
- This will allow us to find satellite families or people who live in B.C. but pay little to no tax in B.C. or Canada.
- By providing your SIN you are helping ensure that everyone is paying their fair share of tax.

2. What if I don't want to provide my SIN? Can I still complete the declaration?

- No. If you are a Canadian, **you must provide your SIN to complete the declaration and claim your exemption**.
- Individuals who do not have a SIN will also be asked to provide an identifying number, such as their Business Number, trust Canada Revenue Agency account number and a provincial nomination number.
- If you don't provide your SIN or another accepted identification number, **you won't be able to complete your declaration and you will receive a tax notice of tax owing in March** – even if you are eligible for an exemption.
- **There will be no exceptions.**

3. How is the government protecting my privacy and taxpayer confidentiality?

- As with all taxpayer information, the B.C. government takes information privacy very seriously.
- The protection and confidentiality of taxpayer information are established through tax law.
- Individuals who violate the confidentiality under the law can face penalties such as fines and imprisonment.
- The online application, eTax, is secure and approved to protect taxpayer information.

<The info below was sent by Russell Bell to Jordan Goss @ FIN>

SBC uses PIA MTIC 16066 and CITZ 18043 to support this process.

CITZ 18043 describes - Ownership of tier One Call centre for Property Tax is with Maximus

MTIC 16066 – describes - SBC Contact Centre agents would provide citizens Tier 1 support for the PayBC's applications. "The SBC Contact centre already collected person information as necessary to assist callers with queries and it is not necessary to collect further detailed information about the citizen's PAYBC usage needs."

Both PIA's for SBC are light on detail as they reference FIN #16034 as the overriding authority for action.

Hope this is helpful for you,

Cheers,

Erin

Erin Borrows

Program Analyst

Service BC | Ministry of Citizens' Services

Phone: 778.698.2096 | Web: <http://www.servicebc.gov.bc.ca>

"Access to government services made easy"

Lovell, Claire FIN:EX

From: Demianchuk, Janette FIN:EX
Sent: February 5, 2019 3:41 PM
To: Lovell, Claire FIN:EX
Subject: RE: PIA# 16045

Awesome thanks!!!!

From: Lovell, Claire FIN:EX
Sent: February 5, 2019 3:18 PM
To: Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>
Subject: RE: PIA# 16045

Hi Janette,

I have reached out to my contact at SBC. She is going to put me in touch with Jeff Mousseau. From what I understood Jeff drafted a PIA that may contemplate the collection notice for the Maximus phone services.

Also, I am going to see if I can get a copy of PIA # MTICS16066. Erin, my contact, thought the collection notice may be covered in that PIA.

I will provide an update when I get more information.

Thanks,

Claire Lovell
Project Officer, Intergovernmental Relations
Income Tax Advisory and Intergovernmental Relations

From: Demianchuk, Janette FIN:EX
Sent: February 5, 2019 12:19 PM
To: Lovell, Claire FIN:EX <Claire.Lovell@gov.bc.ca>
Subject: RE: PIA# 16045

I think she already did ask SBC. ☹

Feel free to ask as different people may know more info. She got her info from Russel Bell (and Jeff Mousseau).

From: Lovell, Claire FIN:EX
Sent: February 5, 2019 11:49 AM
To: Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>
Subject: RE: PIA# 16045

Hi Janette,

Maybe we could reach out to Dawn and ask if she is aware of a PIA that SBC may have done with Maximus to cover the collection notice. If she is comfortable with it, I could reach out to my SBC contact and ask. I just don't want to step on any toes.

Let me know what you think.

Claire Lovell

Project Officer, Intergovernmental Relations
Income Tax Advisory and Intergovernmental Relations

From: Demianchuk, Janette FIN:EX
Sent: February 5, 2019 11:08 AM
To: Lovell, Claire FIN:EX <Claire.Lovell@gov.bc.ca>
Subject: RE: PIA# 16045

Right, so I think all the information below is for ESIT-AS (formally HPAS) call centre. So doesn't apply to Maximus. I sent urgent email to Kally and Rick yesterday to find out if there was a collection notice for Maximus. Dawn sent me the info below, which doesn't comply with FOIPPA. ☹

From Dawn:

Prior to a caller reaching a Maximus rep they **will hear** the following three messages:

- During this call service BC may ask for and collect personal Information
- Your call may be recorded for quality assurance and training purposes
- Help us deliver great service by completing a short five question survey after your call, simply stay on the line after the agent completes the call to participate in the survey.

On another note, I just did a rush initiative update to 16034 as Jordan wants ESIT-AS to start answering calls too.

From: Lovell, Claire FIN:EX
Sent: February 5, 2019 10:50 AM
To: Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>
Subject: RE: PIA# 16045

Hi Janette,

I looked through the PIA and found the wording of the verbal collection notice over the phone:

Personal information may be collected for the purpose of administering Revenue Services under Section 26(c) of the Freedom of Information and Protection of Privacy Act. Questions about this collection can be directed to the Chief Privacy Security and Compliance Officer, Revenue Services of BC at 1-877-455-4966.

The FOIPA provision used is 26(c). I think we may have to hear back from Dawn to determine if this is the same collection notice provided for all Revenue Division call trees.

Also, I noticed that PIA 16034 (HPAS Tier 1 for PTB) refers to an automated message on page 6 in the information flow table.

8. Personal Information Flow Table

Personal Information Flow Table			
	Description/Purpose	Type	FOIPPA Authority
1.	PTB phone system redirects calls to HPAS call centre.		
2.	Callers hear the following greeting: "You have reached Revenue Services of British Columbia. This call could be monitored for quality and training purposes, please have your account number ready so we may assist you more efficiently."	Out-of-scope (another PIA will cover this step)	←
3.	Callers select an option on the phone tree:	Out-of-scope (PIA# FIN16045 will cover this step)	

However, it states that the message is covered under another PIA. Based on the list of Associated PIAs, I think it may be referring to PIA# 16045. Thought?

3. Related Privacy Impact Assessments

Systems Previously Assessed by PIAs

Software Name	PIA
Rural Property Tax Information System (RP2K)	PIBS_FIN_293; (no PIA FIN# found)
Revenue Management System (RMS-CRM)	RMS Overarching PIA FIN15033
Tax Deferment Application (TDA)	Land TDA PIA FIN16016, and PIBS FIN_295
Content Manager	RMS Content Manager SBRO6002
PTB ICE Control Centre	ICEAnywhere Phone System FIN15032
HPAS Call Centre as a Service	FIN16045 (currently under review) ←

4. Elements of Information or Data

Claire Lovell

Project Officer, Intergovernmental Relations

Income Tax Advisory and Intergovernmental Relations

From: Dewar, Pia FIN:EX

Sent: February 5, 2019 9:46 AM

To: Lovell, Claire FIN:EX <Claire.Lovell@gov.bc.ca>; Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>

Subject: RE: PIA# 16045

Good morning Claire and Janette,

Please see PIA FIN16045 attached.

Thank you, have a good week,

Pia Dewar, MLIS – Privacy & Security Analyst

Ministry of Finance, Corporate Services, Information Management Branch

Supporting Finance, Office of the Premier, various agencies, boards, & commissions

Cell: 778-678-1921

From: Lovell, Claire FIN:EX
Sent: February 1, 2019 4:27 PM
To: Dewar, Pia FIN:EX <Pia.Dewar@gov.bc.ca>
Subject: PIA# 16045

Hi Pia,

Are you able to share PIA FIN# 16045 with me and Janette?

Thanks,

Claire Lovell
Project Officer, Intergovernmental Relations
Income Tax Advisory and Intergovernmental Relations
Income Taxation Branch
Ministry of Finance
Phone: 778 698-9665

Lovell, Claire FIN:EX

From: Mann, Dawn FIN:EX
Sent: February 2, 2019 1:03 PM
To: Demianchuk, Janette FIN:EX; McLaughlin, Heather FIN:EX
Cc: Lovell, Claire FIN:EX
Subject: RE: collection notice - Maximus

Absolutely!

From: Demianchuk, Janette FIN:EX
Sent: Saturday, February 2, 2019 1:03 PM
To: Mann, Dawn FIN:EX <Dawn.Mann@gov.bc.ca>; McLaughlin, Heather FIN:EX <Heather.McLaughlin@gov.bc.ca>
Cc: Lovell, Claire FIN:EX <Claire.Lovell@gov.bc.ca>
Subject: RE: collection notice - Maximus

Is end of day Monday do-able?

From: Mann, Dawn FIN:EX
Sent: February 2, 2019 1:02 PM
To: Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>; McLaughlin, Heather FIN:EX <Heather.McLaughlin@gov.bc.ca>
Cc: Lovell, Claire FIN:EX <Claire.Lovell@gov.bc.ca>
Subject: RE: collection notice - Maximus

Sorry Janette – just seeing this now. How quickly do you need this?

From: Demianchuk, Janette FIN:EX
Sent: Friday, February 1, 2019 4:34 PM
To: Mann, Dawn FIN:EX <Dawn.Mann@gov.bc.ca>; McLaughlin, Heather FIN:EX <Heather.McLaughlin@gov.bc.ca>
Cc: Lovell, Claire FIN:EX <Claire.Lovell@gov.bc.ca>
Subject: collection notice - Maximus

Hi Dawn and Heather,

Do either of you happen to have access to what the collection notice says on the service bc phone line (Maximus) when someone calls in? I'm assuming there is one. It would be similar to "This information is collected under the authority of section 26(c) of FOIPPA. If you have questions about why your information is being collected, please contact....."

I need to include it in the PIA.

Thank you!

Janette Demianchuk
Legislative and Policy Analyst
Property Taxation Branch
Ministry of Finance
☎ 778-698-9164

Lovell, Claire FIN:EX

From: Demianchuk, Janette FIN:EX
Sent: January 31, 2019 3:32 PM
To: Lovell, Claire FIN:EX
Subject: FIN18049 - PIA_PTB Tier 1 Jan 28
Attachments: FIN18049 - PIA_PTB Tier 1 Jan 28.doc

Hi,

Can you please review this and ensure it includes all the information needed to support the CIPA? Feel free to add anything. 😊

Thanks,
Janette

Lovell, Claire FIN:EX

From: Demianchuk, Janette FIN:EX
Sent: January 24, 2019 4:09 PM
To: Lovell, Claire FIN:EX
Subject: RE: PIAs: SBC and FIN

The Tier 1 call centre speaks to their access to TACS, but are you looking more for the service bc locations? Do you have access to the TACS overarching PIA? I wonder if there is something in there, however I think it's unlikely. Unfortunately I don't have access to that PIA.

I feel like there is a bit of gap with the service bc locations, and I'm not clear on if it's intentional or not. My understanding is the same as yours, we are all responsible for doing our own PIA unless an agreement is made to do a joint PIA. s.22

Are these PIA complications going to hold up the CIPA being signed off?

From: Lovell, Claire FIN:EX
Sent: January 24, 2019 12:12 PM
To: Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>
Subject: RE: PIAs: SBC and FIN

Thank you Janette,

You have been so helpful. Essentially, I am looking for any PIA that covers the authorities for SBC to conduct work on behalf of PTB. I am trying to identify where there may be gaps, but I want to ensure that I am not duplicating any PIA that has already been completed. I don't think I need a program PIA, unless it contemplates the flow of information to/from SBC or the contact centre.

Erin, from SBC, told me that SBC has used "super PIAs", like an umbrella PIA, to cover multiple programs. Last I heard, SBC was working with PCT to see if they are able to create a Super PIA that will cover all CIPAs. To my knowledge, each party is reasonable for the completion of their own PIA, unless there is agreement for a joint PIA. Both parties would need to sign off on this PIA.

However, are you aware of a system PIA that would contemplate SBC access to TACS?

Claire Lovell
Project Officer, Intergovernmental Relations
Income Tax Advisory and Intergovernmental Relations

From: Demianchuk, Janette FIN:EX
Sent: January 23, 2019 10:28 AM
To: Lovell, Claire FIN:EX <Claire.Lovell@gov.bc.ca>
Subject: RE: PIAs: SBC and FIN

Hi,

I've attached some PIA's for you. The entering of HOG applications seems to be missing from the Tier 1 PIA. I'm wondering if I should see if we can open it to add that one piece of information since it's not signed, and not able to be

signed until the CIPA is completed. I've attached the HOG PIA, but I don't think it will be of too much help. I've also updated the TACS PIA update that was done for spec tax. Are you looking for all the program PIA's that are included under the SBC Agreement for PTB? Also, do you know if Service BC has their own PIA for the work (completed both by them and Maximus)? It sounds like the direction at the time was that the HOG application entering would be captured under the PIA that Service BC completed.

Thanks,
Janette

From: Lovell, Claire FIN:EX
Sent: January 23, 2019 8:43 AM
To: Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>
Subject: PIAs: SBC and FIN

Good morning Janette,

I am not sure if you can help me, but if you can't I think you might know who I should ask. The original Service Level Agreement between Service BC and FIN was signed in 2014, with the corresponding PIA # 13020. In 2016, Service BC was granted access to TACS to assist with HOG Applications. Do you know if there was a PIA created for the system access and for this additional work? I know the agreement was not updated to reflect these additional services.

Just trying to try together piece together some pieces for the big PIA for the new SBC Agreement. This is what I have so far:

Original PIA: 13020
HOG PIA: ?
PTB Tier 1 PIA: Roger (have a copy)
SVT PIA: Janette (can you share a version?)

If you have a copy of the Speculation and Vacancy Tax Pia that I can reference, that would be a big help. Also, if you are aware of any other PIA's please let me know.

Thanks,

Claire Lovell
Project Officer, Intergovernmental Relations
Income Tax Advisory and Intergovernmental Relations
Income Taxation Branch
Ministry of Finance
Phone: 778 698-9665

Lovell, Claire FIN:EX

From: Tailleir, Roger FIN:EX
Sent: November 28, 2018 11:44 AM
To: Lovell, Claire FIN:EX
Subject: RE: FIN18049 - PTB Tier 1- Revised PIA Submission_PTB

Great.

Roger Tailleir BSF, RPF
Policy & Legislative Analyst
Property Taxation Branch
778-698-3878

From: Lovell, Claire FIN:EX
Sent: Wednesday, November 28, 2018 11:44 AM
To: Tailleir, Roger FIN:EX
Subject: RE: FIN18049 - PTB Tier 1- Revised PIA Submission_PTB

Hi Roger,

That's great news. We are still drafting at the moment, but I will keep you updated on the progress of the CIPA.

Claire Lovell
Project Officer, Intergovernmental Relations
Income Tax Advisory and Intergovernmental Relations

From: Tailleir, Roger FIN:EX
Sent: November 28, 2018 11:24 AM
To: Lovell, Claire FIN:EX <Claire.Lovell@gov.bc.ca>
Subject: FW: FIN18049 - PTB Tier 1- Revised PIA Submission_PTB

Claire,

The Tier 1 PIA has now been 'approved' by PCT Branch after Lance Cole's review and a peer review as well. It can be signed right after the CIPA is signed.

Could you please let me know once the CIPA is signed.

Thanks Claire.
Roger

Roger Tailleir BSF, RPF
Policy & Legislative Analyst
Property Taxation Branch
778-698-3878

From: Lance, Cole CITZ:EX
Sent: Wednesday, November 28, 2018 11:03 AM

To: Tailleur, Roger FIN:EX
Subject: RE: FIN18049 - PTB Tier 1- Revised PIA Submission_PTB

Hi Roger,

I just wanted to follow up on this PIA. The PIA doesn't have any issues on our end, which is including my review and the peer review. With that being the case, once the CIPA is signed, the authorities will be in place and we will flip a signed copy of this PIA over to you. Please let me know when that happens,

Cheers,
Cole

Cole Lance (he/him)
Privacy Advisor
Privacy, Compliance and Training Branch
(778) 698-5837

From: Tailleur, Roger FIN:EX
Sent: October 23, 2018 12:00 PM
To: Lance, Cole CITZ:EX <Cole.Lance@gov.bc.ca>
Subject: RE: FIN18049 - PTB Tier 1- Revised PIA Submission_PTB

Thanks very much, Cole.

Roger

Roger Tailleur BSF, RPF
Policy & Legislative Analyst
Property Taxation Branch
778-698-3878

From: Lance, Cole CITZ:EX
Sent: Tuesday, October 23, 2018 9:35 AM
To: Tailleur, Roger FIN:EX
Subject: RE: FIN18049 - PTB Tier 1- Revised PIA Submission_PTB

Hi Roger,

The PIA is in peer review now. I've sent a follow up request just now to see if there's any issues we need to clear up while we're waiting for the CIPA to be signed. I'll be in touch as soon as I hear back,

Thanks,
Cole

From: Tailleur, Roger FIN:EX
Sent: October 22, 2018 9:56 AM
To: Lance, Cole CITZ:EX <Cole.Lance@gov.bc.ca>
Subject: RE: FIN18049 - PTB Tier 1- Revised PIA Submission_PTB

Hello Cole,

I am just checking in with you to see if the PIA has gone through peer review now and if everything is still okay as we wait for the CIPA to be signed.

Thanks,

Roger

Roger Tailleir BSF, RPF
Policy & Legislative Analyst
Property Taxation Branch
778-698-3878

From: Lance, Cole CITZ:EX
Sent: Wednesday, September 5, 2018 3:46 PM
To: Tailleir, Roger FIN:EX
Cc: Dewar, Pia FIN:EX; Brouwer, Deborah FIN:EX
Subject: RE: FIN18049 - PTB Tier 1- Revised PIA Submission_PTB

Hi Roger,

Thank you for sending back the revised version, I will send this up to peer review now. If peer review is ok with the file, then the only missing piece will be the CIPA. Once the CIPA is signed, please let me know as the CIPA must be signed before the PIA.

Please let me know if you have any other questions,
Thank you,
Cole

From: Tailleir, Roger FIN:EX
Sent: September 5, 2018 1:35 PM
To: Lance, Cole CITZ:EX ; pia intake CITZ:EX
Cc: Dewar, Pia FIN:EX ; Brouwer, Deborah FIN:EX
Subject: FIN18049 - PTB Tier 1- Revised PIA Submission_PTB

Hello Cole,

Thank you for your prompt review.
Please accept attached PIA# 18049, for Maximus Canada Tier 1-level Call Centre, with your revisions fully accepted. This PIA is being written in conjunction with a CIPA, currently still being worked on.

Please let me know further steps so we may finalize this Pia in near future. Thank you.

Roger

Roger Tailleir
Policy & Legislative Analyst, BSF, RPF
Property Taxation Branch
778-698-3878

From: Dewar, Pia FIN:EX
Sent: Friday, August 31, 2018 1:46 PM
To: Tailleir, Roger FIN:EX
Subject: FW: FIN18049 - PIA Submission_PTB

Good afternoon Roger,

I've taken a look at this PIA draft, and it looks good to me, but as you are the contact for the program area what matters, is how it looks to you. Please review, and if the changes make sense, please agree to them in the draft, and send it back to Cole. We should have this wrapped up soon.

Have a good long weekend,

Pia Dewar, MLIS – Privacy & Security Analyst
Ministry of Finance, Corporate Services, Information Management Branch
Supporting Finance, Office of the Premier, various agencies, boards, & commissions
Cell: 778-678-1921

From: Lance, Cole CITZ:EX
Sent: August 29, 2018 11:38 AM
To: Dewar, Pia FIN:EX <Pia.Dewar@gov.bc.ca>
Subject: RE: FIN18049 - PIA Submission_PTB

Hi Pia,

I've reviewed this PIA and made a few changes for you to review. I changed some of the focus from Service BC to FIN as Service BC won't be signing the PIA. Please let me know your thoughts and we can move forward from there,

Thank you,
Cole

From: pia intake CITZ:EX
Sent: August 13, 2018 3:46 PM
To: Dewar, Pia FIN:EX <Pia.Dewar@gov.bc.ca>
Cc: Tailleir, Roger FIN:EX <Roger.Tailleir@gov.bc.ca>; Lance, Cole CITZ:EX <Cole.Lance@gov.bc.ca>
Subject: FIN18049 - PIA Submission_PTB

Dear Pia,

Thank you for submitting your PIA. **Cole Lance** has been assigned your PIA and your tracking number is **FIN18049**. Please allow up to two weeks for the initial review of your PIA. If you have any questions or are working under a tight deadline, please contact **Cole** directly.

Regards,

Mike Corcoran | Privacy Analyst
Privacy, Compliance and Training Branch
Corporate Information & Records Management | Ministry of Citizens' Services
Ph: 778.698.8174

From: Dewar, Pia FIN:EX
Sent: Monday, August 13, 2018 10:02 AM
To: pia intake CITZ:EX

Cc: Tailleur, Roger FIN:EX
Subject: PIA Submission_PTB

Good morning,

Please accept this PIA I'm submitting on behalf of Property Taxation Branch (PTB). This PIA concerns the use of service provider Maximus Canada to operate a Tier 1-level call centre for multiple programs and initiatives. This PIA is being written in conjunction with a CIPA, currently still being worked on.

Thank you,

Pia Dewar, MLIS – Privacy & Security Analyst
Ministry of Finance, Corporate Services, Information Management Branch
Supporting Finance, Office of the Premier, various agencies, boards, & commissions
Cell: 778-678-1921

Lovell, Claire FIN:EX

From: Tailleur, Roger FIN:EX
Sent: October 23, 2018 12:02 PM
To: Lovell, Claire FIN:EX
Subject: FYI PIA FIN18049 - PTB Tier 1- Revised PIA Submission_PTB

Hi Claire,

FYI

Roger Tailleur BSF, RPF
Policy & Legislative Analyst
Property Taxation Branch
778-698-3878

From: Lance, Cole CITZ:EX
Sent: Tuesday, October 23, 2018 9:35 AM
To: Tailleur, Roger FIN:EX
Subject: RE: FIN18049 - PTB Tier 1- Revised PIA Submission_PTB

Hi Roger,

The PIA is in peer review now. I've sent a follow up request just now to see if there's any issues we need to clear up while we're waiting for the CIPA to be signed. I'll be in touch as soon as I hear back,

Thanks,
Cole

From: Tailleur, Roger FIN:EX
Sent: October 22, 2018 9:56 AM
To: Lance, Cole CITZ:EX <Cole.Lance@gov.bc.ca>
Subject: RE: FIN18049 - PTB Tier 1- Revised PIA Submission_PTB

Hello Cole,

I am just checking in with you to see if the PIA has gone through peer review now and if everything is still okay as we wait for the CIPA to be signed.

Thanks,

Roger

Roger Tailleur BSF, RPF
Policy & Legislative Analyst
Property Taxation Branch
778-698-3878

From: Lance, Cole CITZ:EX
Sent: Wednesday, September 5, 2018 3:46 PM

To: Tailleur, Roger FIN:EX
Cc: Dewar, Pia FIN:EX; Brouwer, Deborah FIN:EX
Subject: RE: FIN18049 - PTB Tier 1- Revised PIA Submission_PTB

Hi Roger,

Thank you for sending back the revised version, I will send this up to peer review now. If peer review is ok with the file, then the only missing piece will be the CIPA. Once the CIPA is signed, please let me know as the CIPA must be signed before the PIA.

Please let me know if you have any other questions,
Thank you,
Cole

From: Tailleur, Roger FIN:EX
Sent: September 5, 2018 1:35 PM
To: Lance, Cole CITZ:EX ; pia intake CITZ:EX
Cc: Dewar, Pia FIN:EX ; Brouwer, Deborah FIN:EX
Subject: FIN18049 - PTB Tier 1- Revised PIA Submission_PTB

Hello Cole,

Thank you for your prompt review.
Please accept attached PIA# 18049, for Maximus Canada Tier 1-level Call Centre, with your revisions fully accepted. This PIA is being written in conjunction with a CIPA, currently still being worked on.

Please let me know further steps so we may finalize this Pia in near future. Thank you.

Roger

Roger Tailleur
Policy & Legislative Analyst, BSF, RPF
Property Taxation Branch
778-698-3878

From: Dewar, Pia FIN:EX
Sent: Friday, August 31, 2018 1:46 PM
To: Tailleur, Roger FIN:EX
Subject: FW: FIN18049 - PIA Submission_PTB

Good afternoon Roger,

I've taken a look at this PIA draft, and it looks good to me, but as you are the contact for the program area what matters, is how it looks to you. Please review, and if the changes make sense, please agree to them in the draft, and send it back to Cole. We should have this wrapped up soon.

Have a good long weekend,

Pia Dewar, MLIS – Privacy & Security Analyst
Ministry of Finance, Corporate Services, Information Management Branch
Supporting Finance, Office of the Premier, various agencies, boards, & commissions

Cell: 778-678-1921

From: Lance, Cole CITZ:EX
Sent: August 29, 2018 11:38 AM
To: Dewar, Pia FIN:EX <Pia.Dewar@gov.bc.ca>
Subject: RE: FIN18049 - PIA Submission_PTB

Hi Pia,

I've reviewed this PIA and made a few changes for you to review. I changed some of the focus from Service BC to FIN as Service BC won't be signing the PIA. Please let me know your thoughts and we can move forward from there,

Thank you,
Cole

From: pia intake CITZ:EX
Sent: August 13, 2018 3:46 PM
To: Dewar, Pia FIN:EX <Pia.Dewar@gov.bc.ca>
Cc: Tailleir, Roger FIN:EX <Roger.Tailleir@gov.bc.ca>; Lance, Cole CITZ:EX <Cole.Lance@gov.bc.ca>
Subject: FIN18049 - PIA Submission_PTB

Dear Pia,

Thank you for submitting your PIA. **Cole Lance** has been assigned your PIA and your tracking number is **FIN18049**. Please allow up to two weeks for the initial review of your PIA. If you have any questions or are working under a tight deadline, please contact **Cole** directly.

Regards,

Mike Corcoran | Privacy Analyst
Privacy, Compliance and Training Branch
Corporate Information & Records Management | Ministry of Citizens' Services
Ph: 778.698.8174

From: Dewar, Pia FIN:EX
Sent: Monday, August 13, 2018 10:02 AM
To: pia intake CITZ:EX
Cc: Tailleir, Roger FIN:EX
Subject: PIA Submission_PTB

Good morning,

Please accept this PIA I'm submitting on behalf of Property Taxation Branch (PTB). This PIA concerns the use of service provider Maximus Canada to operate a Tier 1-level call centre for multiple programs and initiatives. This PIA is being written in conjunction with a CIPA, currently still being worked on.

Thank you,

Pia Dewar, MLIS – Privacy & Security Analyst

Ministry of Finance, Corporate Services, Information Management Branch
Supporting Finance, Office of the Premier, various agencies, boards, & commissions
Cell: 778-678-1921

Lovell, Claire FIN:EX

From: Clarke, Treana FIN:EX
Sent: September 28, 2018 2:24 PM
To: Mann, Dawn FIN:EX
Cc: Lovell, Claire FIN:EX
Subject: RE: Tier 1 PIA Submission_PTB

Yes, please 😊.

From: Mann, Dawn FIN:EX
Sent: Friday, September 28, 2018 1:41 PM
To: Clarke, Treana FIN:EX; Brouwer, Deborah FIN:EX
Cc: Demianchuk, Janette FIN:EX; Lovell, Claire FIN:EX
Subject: RE: Tier 1 PIA Submission_PTB

Hi all,

Thank you for the update(s) on both fronts. When we begin discussions on the phase II agreement I will be sure to stay connected this to group throughout the process.

Treana – as there is only a two page amendment to the existing interim agreement for the SBC Contact Centre, would you like a copy for your records?

Have a great weekend,

Dawn Mann
Manager, Divisional Projects
Tel: 250.356.6250

From: Clarke, Treana FIN:EX
Sent: Friday, September 28, 2018 1:02 PM
To: Brouwer, Deborah FIN:EX
Cc: Demianchuk, Janette FIN:EX; Lovell, Claire FIN:EX; Mann, Dawn FIN:EX
Subject: RE: Tier 1 PIA Submission_PTB

Hi Deb,

Yes, our goal is to have the re-write ready in time for Spec Tax. Claire will keep you apprised on progress and will reach out as necessary.

Thanks,

Treana

From: Brouwer, Deborah FIN:EX
Sent: Friday, September 28, 2018 12:43 PM
To: Mann, Dawn FIN:EX
Cc: Clarke, Treana FIN:EX; Demianchuk, Janette FIN:EX; Lovell, Claire FIN:EX
Subject: FW: Tier 1 PIA Submission_PTB

Hi Dawn,
See the status of the spec tax PIAs below from Janette.

s.13

s.13

Thanks,
Deb

From: Demianchuk, Janette FIN:EX
Sent: September 28, 2018 9:42 AM
To: Brouwer, Deborah FIN:EX <Deborah.Brouwer@gov.bc.ca>
Subject: RE: Tler 1 PIA Submission_PT B

Hi,

Our plan for the PIA is as follows:

1. Complete a PIA update to the Call Centre PIA that Roger drafted to include spec tax. The Call Centre PIA is complete however not signed as it can not be signed until the Common or Integrated Program Agreement (CIPA) is signed. Richard Barlow confirmed completing a PIA update for an unsigned PIA is not a concern. Timing to have this completed will be before January. First draft end of October/end of November.
2. Operational PIA for Spec Tax will be completed in two parts. First part will cover the test files needed for BCA/LTSA, the declaration and the NOFA/SOFA. Second phase will cover the tax credits, payments, audit and refunds. First draft of phase 1 to be completed for mid-October. First draft of phase 2 to be completed November.
3. System PIA update will be completed for the changes to Gentax needed to administer spec tax. This also covers e-Tax. Loise Lam is drafting this PIA update.

Let me know if that answers your question or if you need any further details. Thanks!

Thanks,
Janette

From: Brouwer, Deborah FIN:EX
Sent: September 28, 2018 9:30 AM
To: Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>
Subject: RE: Tler 1 PIA Submission_PT B

Good morning - What should we tell Dawn about the PIA?

From: Mann, Dawn FIN:EX
Sent: September 28, 2018 9:09 AM
To: Brouwer, Deborah FIN:EX <Deborah.Brouwer@gov.bc.ca>
Subject: RE: Tler 1 PIA Submission_PT B

Good morning Deb,

I thought I should circle back on this to see how the PIA is coming along for the Speculation Tax project.

I realized I did not respond to this email but should let you know that^{s.13}

s.13

s.13

I'm hoping this is reasonable. If it is not, when we negotiate the next agreement (for January 1st, I will get you involved so this can be addressed.

Let me know if you have any questions,

Dawn Mann

Manager, Divisional Projects
Tel: 250.356.6250

From: Brouwer, Deborah FIN:EX
Sent: Monday, August 27, 2018 2:06 PM
To: Mann, Dawn FIN:EX; Clarke, Treana FIN:EX
Cc: Demianchuk, Janette FIN:EX; Lovell, Claire FIN:EX
Subject: RE: Tier 1 PIA Submission_PTB

Ok, great! I think we can incorporate the SBC contract center piece into the Speculation tax program PIA.

s.13

From: Mann, Dawn FIN:EX
Sent: August 27, 2018 2:00 PM
To: Clarke, Treana FIN:EX <Treana.Clarke@gov.bc.ca>; Brouwer, Deborah FIN:EX <Deborah.Brouwer@gov.bc.ca>
Cc: Demianchuk, Janette FIN:EX <Janette.Demianchuk@gov.bc.ca>; Lovell, Claire FIN:EX <Claire.Lovell@gov.bc.ca>
Subject: RE: Tier 1 PIA Submission_PTB

Hi everyone,

To confirm – I am working with SBC on the amendment to the Interim Agreement and will be running it by David Seitz at RSB.

Dawn Mann

Manager, Divisional Projects
Tel: 250.356.6250

From: Clarke, Treana FIN:EX
Sent: Monday, August 27, 2018 1:56 PM
To: Brouwer, Deborah FIN:EX
Cc: Demianchuk, Janette FIN:EX; Lovell, Claire FIN:EX; Mann, Dawn FIN:EX
Subject: RE: Tier 1 PIA Submission_PTB

Hi Deb,

My team is not working on the amendment to the Interim agreement with Service BC. This was something Dawn was going to discuss with David Seitz.

I hope that helps clarify. Please let me know if you would like to discuss further.

Thanks,

Treana

From: Brouwer, Deborah FIN:EX
Sent: Monday, August 27, 2018 1:10 PM
To: Mann, Dawn FIN:EX
Cc: Demianchuk, Janette FIN:EX; Clarke, Treana FIN:EX
Subject: RE: Tier 1 PIA Submission_PTB

Hi Dawn,
Janette Demianchuk is going to be our spec tax lead on information sharing and will handle the speculation tax program PIA.

What "PIA Initiative Update" is required related to the SBC Contact Centre? Do we need to do one following Roger's model? Or do we incorporate it into the CIPA that I think Treana's group is working on?

Thanks,
Deb

From: Mann, Dawn FIN:EX
Sent: August 27, 2018 12:40 PM
To: Brouwer, Deborah FIN:EX <Deborah.Brouwer@gov.bc.ca>
Subject: FW: Tier 1 PIA Submission_PTB

Hi Deb,

I thought I would follow up on this to confirm who will be taking the lead on this for you?

Thank you in advance,

Dawn Mann
Manager, Divisional Projects
Tel: 250.356.6250

From: Mann, Dawn FIN:EX
Sent: Monday, August 13, 2018 11:17 AM
To: Tailleir, Roger FIN:EX
Cc: Ford, Louise E FIN:EX; Brouwer, Deborah FIN:EX
Subject: RE: Tier 1 PIA Submission_PTB

Hi Roger,

Thank you for following through on the completion of the PIA for the SBC Contact Centre Tier 1 services – well done!

Looking forward, we will need to incorporate the new Speculation Tax into this PIA as well as the overarching master agreement. Treana Clarke is aware of the new Speculation Tax requirements so I am confident that will be completed in the latest update.

Deborah - do you know who on your team would be able to take on a PIA Initiative Update for the new tax? I know we are waiting to hear back from Maximus and SBC on the cost model but expect this will be going ahead for mid-October.

Let me know and I will connect with you later in the week to discuss,

Dawn Mann
Manager, Divisional Projects
Tel: 250.356.6250

From: Tailleir, Roger FIN:EX
Sent: Monday, August 13, 2018 10:12 AM
To: Brouwer, Deborah FIN:EX
Cc: Mann, Dawn FIN:EX; Ford, Louise E FIN:EX
Subject: Tier 1 PIA Submission_PTB

Deborah,

Pia has reviewed our Maximus Tier 1 PIA and is okay with it as is, and so submitted it to PCT today, with the understanding that the CIPA is still being written and that changes to our PIA might be required in future so that it aligns with the CIPA.

Roger

Roger Tailleir
Policy & Legislative Analyst, BSF, RPF
Property Taxation Branch
778-698-3878

From: Dewar, Pia FIN:EX
Sent: Monday, August 13, 2018 10:02 AM
To: pia intake CITZ:EX
Cc: Tailleir, Roger FIN:EX
Subject: PIA Submission_PTB

Good morning,

Please accept this PIA I'm submitting on behalf of Property Taxation Branch (PTB). This PIA concerns the use of service provider Maximus Canada to operate a Tier 1-level call centre for multiple programs and initiatives. This PIA is being written in conjunction with a CIPA, currently still being worked on.

Thank you,

Pia Dewar, MLIS – Privacy & Security Analyst
Ministry of Finance, Corporate Services, Information Management Branch
Supporting Finance, Office of the Premier, various agencies, boards, & commissions
Cell: 778-678-1921

Lovell, Claire FIN:EX

From: Brouwer, Deborah FIN:EX
Sent: September 19, 2018 5:39 PM
To: Clarke, Treana FIN:EX
Subject: RE: Tler 1 PIA Submission_PTB

Ok, good, thanks for letting me know.

From: Clarke, Treana FIN:EX
Sent: September 19, 2018 5:35 PM
To: Brouwer, Deborah FIN:EX
Subject: Fw: Tler 1 PIA Submission_PTB

Found this in the email. I take it this is with Dawn but she will connect with David Seitz when needed.

Sent from my BlackBerry 10 smartphone on the TELUS network.

From: Clarke, Treana FIN:EX <Treana.Clarke@gov.bc.ca>
Sent: Monday, August 27, 2018 2:06 PM
To: Mann, Dawn FIN:EX; Brouwer, Deborah FIN:EX
Cc: Demianchuk, Janette FIN:EX; Lovell, Claire FIN:EX
Subject: RE: Tler 1 PIA Submission_PTB

Perfect. Thank you for confirming, Dawn. ☺

Anything contemplated in the Interim Agreement will eventually be superseded by the overarching agreement my team (Claire) is working on. Please keep Claire in the loop on the developments of the Interim Agreement since she is coordinating the drafting of the overarching agreement.

From: Mann, Dawn FIN:EX
Sent: Monday, August 27, 2018 2:00 PM
To: Clarke, Treana FIN:EX; Brouwer, Deborah FIN:EX
Cc: Demianchuk, Janette FIN:EX; Lovell, Claire FIN:EX
Subject: RE: Tler 1 PIA Submission_PTB

Hi everyone,

To confirm – I am working with SBC on the amendment to the Interim Agreement and will be running it by David Seitz at RSB.

Dawn Mann
Manager, Divisional Projects
Tel: 250.356.6250

From: Clarke, Treana FIN:EX
Sent: Monday, August 27, 2018 1:56 PM
To: Brouwer, Deborah FIN:EX

Cc: Demianchuk, Janette FIN:EX; Lovell, Claire FIN:EX; Mann, Dawn FIN:EX

Subject: RE: Tier 1 PIA Submission_PTB

Hi Deb,

s.13

My team is not working on the amendment to the Interim agreement with Service BC. This was something Dawn was going to discuss with David Seitz.

I hope that helps clarify. Please let me know if you would like to discuss further.

Thanks,

Treana

From: Brouwer, Deborah FIN:EX

Sent: Monday, August 27, 2018 1:10 PM

To: Mann, Dawn FIN:EX

Cc: Demianchuk, Janette FIN:EX; Clarke, Treana FIN:EX

Subject: RE: Tier 1 PIA Submission_PTB

Hi Dawn,

Janette Demianchuk is going to be our spec tax lead on information sharing and will handle the speculation tax program PIA.

What "PIA Initiative Update" is required related to the SBC Contact Centre? Do we need to do one following Roger's model? Or do we incorporate it into the CIPA that I think Treana's group is working on?

Thanks,

Deb

From: Mann, Dawn FIN:EX

Sent: August 27, 2018 12:40 PM

To: Brouwer, Deborah FIN:EX <Deborah.Brouwer@gov.bc.ca>

Subject: FW: Tier 1 PIA Submission_PTB

Hi Deb,

I thought I would follow up on this to confirm who will be taking the lead on this for you?

Thank you in advance,

Dawn Mann

Manager, Divisional Projects

Tel: 250.356.6250

From: Mann, Dawn FIN:EX
Sent: Monday, August 13, 2018 11:17 AM
To: Tailleir, Roger FIN:EX
Cc: Ford, Louise E FIN:EX; Brouwer, Deborah FIN:EX
Subject: RE: Tier 1 PIA Submission_PTB

Hi Roger,

Thank you for following through on the completion of the PIA for the SBC Contact Centre Tier 1 services – well done!

Looking forward, we will need to incorporate the new Speculation Tax into this PIA as well as the overarching master agreement. Treana Clarke is aware of the new Speculation Tax requirements so I am confident that will be completed in the latest update.

Deborah - do you know who on your team would be able to take on a PIA Initiative Update for the new tax? I know we are waiting to hear back from Maximus and SBC on the cost model but expect this will be going ahead for mid-October.

Let me know and I will connect with you later in the week to discuss,

Dawn Mann

Manager, Divisional Projects

Tel: 250.356.6250

From: Tailleir, Roger FIN:EX
Sent: Monday, August 13, 2018 10:12 AM
To: Brouwer, Deborah FIN:EX
Cc: Mann, Dawn FIN:EX; Ford, Louise E FIN:EX
Subject: Tier 1 PIA Submission_PTB

Deborah,

Pia has reviewed our Maximus Tier 1 PIA and is okay with it as is, and so submitted it to PCT today, with the understanding that the CIPA is still being written and that changes to our PIA might be required in future so that it aligns with the CIPA.

Roger

Roger Tailleir
Policy & Legislative Analyst, BSF, RPF
Property Taxation Branch
778-698-3878

From: Dewar, Pia FIN:EX
Sent: Monday, August 13, 2018 10:02 AM
To: pia intake CITZ:EX
Cc: Tailleir, Roger FIN:EX
Subject: PIA Submission_PTB

Good morning,

Please accept this PIA I'm submitting on behalf of Property Taxation Branch (PTB). This PIA concerns the use of service provider Maximus Canada to operate a Tier 1-level call centre for multiple programs and initiatives. This PIA is being written in conjunction with a CIPA, currently still being worked on.

Thank you,

Pia Dewar, MLIS – Privacy & Security Analyst
Ministry of Finance, Corporate Services, Information Management Branch
Supporting Finance, Office of the Premier, various agencies, boards, & commissions
Cell: 778-678-1921

Lovell, Claire FIN:EX

From: Tailleux, Roger FIN:EX
Sent: September 6, 2018 4:34 PM
To: Lovell, Claire FIN:EX
Subject: RE: FYI - FW: FIN18049 - PTB Tier 1- Revised PIA Submission_PTB
Attachments: FIN18049 - PIA_PTB Tier 1 FINAL_5SEPT2018.doc

Claire,

Here is the final. The changes are mostly moving info into the Introduction section from Scope section and cleaning up the P.I. section (removing some items that are solely SBC's responsibility), etc.

Yes, Janette works in my Policy team so I am providing all info for her to help her with her PIA.

Roger

Roger Tailleux
Policy & Legislative Analyst, BSF, RPF
Property Taxation Branch
778-698-3878

From: Lovell, Claire FIN:EX
Sent: Thursday, September 6, 2018 4:29 PM
To: Tailleux, Roger FIN:EX
Subject: RE: FYI - FW: FIN18049 - PTB Tier 1- Revised PIA Submission_PTB

Hi Roger,

Thank you for the update. Can you please share the revised version? I'm interested to see what change PCT made.

Also, I met with Janette Demianchuk last week. I believe she is drafting the PIA for Spec Tax to be included in the Call Centre. Have you shared this information with her? She may find it beneficial while she is drafting.

Thanks for keeping me in the loop.

Claire Lovell
Project Officer, Intergovernmental Relations
Income Tax Advisory and Intergovernmental Relations

From: Tailleux, Roger FIN:EX
Sent: Thursday, September 6, 2018 3:14 PM
To: Lovell, Claire FIN:EX
Subject: FYI - FW: FIN18049 - PTB Tier 1- Revised PIA Submission_PTB

Hi Claire,

Just an FYI, re: response from PCT on Tier 1 PIA. Please let me know if you require the revised version (there are no significant changes).

Cheers,

Roger

Roger Tailleir
Policy & Legislative Analyst, BSF, RPF
Property Taxation Branch
778-698-3878

From: Lance, Cole CITZ:EX
Sent: Wednesday, September 5, 2018 3:46 PM
To: Tailleir, Roger FIN:EX
Cc: Dewar, Pia FIN:EX; Brouwer, Deborah FIN:EX
Subject: RE: FIN18049 - PTB Tier 1- Revised PIA Submission_PTB

Hi Roger,

Thank you for sending back the revised version, I will send this up to peer review now. If peer review is ok with the file, then the only missing piece will be the CIPA. Once the CIPA is signed, please let me know as the CIPA must be signed before the PIA.

Please let me know if you have any other questions,
Thank you,
Cole

From: Tailleir, Roger FIN:EX
Sent: September 5, 2018 1:35 PM
To: Lance, Cole CITZ:EX <Cole.Lance@gov.bc.ca>; pia intake CITZ:EX <pia.intake@gov.bc.ca>
Cc: Dewar, Pia FIN:EX <Pia.Dewar@gov.bc.ca>; Brouwer, Deborah FIN:EX <Deborah.Brouwer@gov.bc.ca>
Subject: FIN18049 - PTB Tier 1- Revised PIA Submission_PTB

Hello Cole,

Thank you for your prompt review.
Please accept attached PIA# 18049, for Maximus Canada Tier 1-level Call Centre, with your revisions fully accepted. This PIA is being written in conjunction with a CIPA, currently still being worked on.

Please let me know further steps so we may finalize this Pia in near future. Thank you.

Roger

Roger Tailleir
Policy & Legislative Analyst, BSF, RPF
Property Taxation Branch
778-698-3878

From: Dewar, Pia FIN:EX
Sent: Friday, August 31, 2018 1:46 PM
To: Tailleir, Roger FIN:EX
Subject: FW: FIN18049 - PIA Submission_PTB

Good afternoon Roger,

I've taken a look at this PIA draft, and it looks good to me, but as you are the contact for the program area what matters, is how it looks to you. Please review, and if the changes make sense, please agree to them in the draft, and send it back to Cole. We should have this wrapped up soon.

Have a good long weekend,

Pia Dewar, MLIS – Privacy & Security Analyst
Ministry of Finance, Corporate Services, Information Management Branch
Supporting Finance, Office of the Premier, various agencies, boards, & commissions
Cell: 778-678-1921

From: Lance, Cole CITZ:EX
Sent: August 29, 2018 11:38 AM
To: Dewar, Pia FIN:EX <Pia.Dewar@gov.bc.ca>
Subject: RE: FIN18049 - PIA Submission_PTB

Hi Pia,

I've reviewed this PIA and made a few changes for you to review. I changed some of the focus from Service BC to FIN as Service BC won't be signing the PIA. Please let me know your thoughts and we can move forward from there,

Thank you,
Cole

From: pia intake CITZ:EX
Sent: August 13, 2018 3:46 PM
To: Dewar, Pia FIN:EX <Pia.Dewar@gov.bc.ca>
Cc: Tailleir, Roger FIN:EX <Roger.Tailleir@gov.bc.ca>; Lance, Cole CITZ:EX <Cole.Lance@gov.bc.ca>
Subject: FIN18049 - PIA Submission_PTB

Dear Pia,

Thank you for submitting your PIA. **Cole Lance** has been assigned your PIA and your tracking number is **FIN18049**. Please allow up to two weeks for the initial review of your PIA. If you have any questions or are working under a tight deadline, please contact **Cole** directly.

Regards,

Mike Corcoran | Privacy Analyst
Privacy, Compliance and Training Branch
Corporate Information & Records Management | Ministry of Citizens' Services
Ph: 778.698.8174

From: Dewar, Pia FIN:EX
Sent: Monday, August 13, 2018 10:02 AM
To: pia intake CITZ:EX
Cc: Tailleir, Roger FIN:EX
Subject: PIA Submission_PTB

Good morning,

Please accept this PIA I'm submitting on behalf of Property Taxation Branch (PTB). This PIA concerns the use of service provider Maximus Canada to operate a Tier 1-level call centre for multiple programs and initiatives. This PIA is being written in conjunction with a CIPA, currently still being worked on.

Thank you,

Pia Dewar, MLIS – Privacy & Security Analyst
Ministry of Finance, Corporate Services, Information Management Branch
Supporting Finance, Office of the Premier, various agencies, boards, & commissions
Cell: 778-678-1921

Lovell, Claire FIN:EX

From: Mann, Dawn FIN:EX
Sent: August 27, 2018 1:54 PM
To: Brouwer, Deborah FIN:EX
Cc: Demianchuk, Janette FIN:EX; Clarke, Treana FIN:EX
Subject: RE: Tler 1 PIA Submission_PTB

Hi Deb,

Thank you for the follow up – I will add Janette to the SBC Contact Centre Service Expansion project work plan as owning this deliverable.

I believe the direction taken may depend on the timing of the CIPA and revised MOU. The PIA Roger completed has been submitted to PCT so I suspect the Initiative Update is required to address the changes to program contacts and the personal information being collected would warrant this. This is not my area of expertise so sadly I will have to defer to the experts on this.

I happy to support either direction once decided!

Dawn Mann
Manager, Divisional Projects
Tel: 250.356.6250

From: Brouwer, Deborah FIN:EX
Sent: Monday, August 27, 2018 1:10 PM
To: Mann, Dawn FIN:EX
Cc: Demianchuk, Janette FIN:EX; Clarke, Treana FIN:EX
Subject: RE: Tier 1 PIA Submission_PTB

Hi Dawn,
Janette Demianchuk is going to be our spec tax lead on information sharing and will handle the speculation tax program PIA.

What “PIA Initiative Update” is required related to the SBC Contact Centre? Do we need to do one following Roger’s model? Or do we incorporate it into the CIPA that I think Treana’s group is working on?

Thanks,
Deb

From: Mann, Dawn FIN:EX
Sent: August 27, 2018 12:40 PM
To: Brouwer, Deborah FIN:EX
Subject: FW: Tler 1 PIA Submission_PTB

Hi Deb,

I thought I would follow up on this to confirm who will be taking the lead on this for you?

Thank you in advance,

Dawn Mann

Manager, Divisional Projects
Tel: 250.356.6250

From: Mann, Dawn FIN:EX
Sent: Monday, August 13, 2018 11:17 AM
To: Tailleir, Roger FIN:EX
Cc: Ford, Louise E FIN:EX; Brouwer, Deborah FIN:EX
Subject: RE: Tier 1 PIA Submission_PTB

Hi Roger,

Thank you for following through on the completion of the PIA for the SBC Contact Centre Tier 1 services – well done!

Looking forward, we will need to incorporate the new Speculation Tax into this PIA as well as the overarching master agreement. Treana Clarke is aware of the new Speculation Tax requirements so I am confident that will be completed in the latest update.

Deborah - do you know who on your team would be able to take on a PIA Initiative Update for the new tax? I know we are waiting to hear back from Maximus and SBC on the cost model but expect this will be going ahead for mid-October.

Let me know and I will connect with you later in the week to discuss,

Dawn Mann

Manager, Divisional Projects
Tel: 250.356.6250

From: Tailleir, Roger FIN:EX
Sent: Monday, August 13, 2018 10:12 AM
To: Brouwer, Deborah FIN:EX
Cc: Mann, Dawn FIN:EX; Ford, Louise E FIN:EX
Subject: Tier 1 PIA Submission_PTB

Deborah,

Pia has reviewed our Maximus Tier 1 PIA and is okay with it as is, and so submitted it to PCT today, with the understanding that the CIPA is still being written and that changes to our PIA might be required in future so that it aligns with the CIPA.

Roger

Roger Tailleir
Policy & Legislative Analyst, BSF, RPF
Property Taxation Branch
778-698-3878

From: Dewar, Pia FIN:EX
Sent: Monday, August 13, 2018 10:02 AM
To: pia intake CITZ:EX
Cc: Tailleir, Roger FIN:EX
Subject: PIA Submission_PTB

Good morning,

Please accept this PIA I'm submitting on behalf of Property Taxation Branch (PTB). This PIA concerns the use of service provider Maximus Canada to operate a Tier 1-level call centre for multiple programs and initiatives. This PIA is being written in conjunction with a CIPA, currently still being worked on.

Thank you,

Pia Dewar, MLIS – Privacy & Security Analyst
Ministry of Finance, Corporate Services, Information Management Branch
Supporting Finance, Office of the Premier, various agencies, boards, & commissions
Cell: 778-678-1921

Lovell, Claire FIN:EX

From: Mann, Dawn FIN:EX
Sent: August 13, 2018 12:22 PM
To: Clarke, Treana FIN:EX; Lovell, Claire FIN:EX
Subject: FW: Tier 1 PIA Submission_PTB
Attachments: FIN ##### - PIA_PTB Tier 1 Final Draft_29june2018.doc

Fyi....

From: Tailleir, Roger FIN:EX
Sent: Monday, August 13, 2018 10:12 AM
To: Brouwer, Deborah FIN:EX
Cc: Mann, Dawn FIN:EX; Ford, Louise E FIN:EX
Subject: Tier 1 PIA Submission_PTB

Deborah,

Pia has reviewed our Maximus Tier 1 PIA and is okay with it as is, and so submitted it to PCT today, with the understanding that the CIPA is still being written and that changes to our PIA might be required in future so that it aligns with the CIPA.

Roger

Roger Tailleir
Policy & Legislative Analyst, BSF, RPF
Property Taxation Branch
778-698-3878

From: Dewar, Pia FIN:EX
Sent: Monday, August 13, 2018 10:02 AM
To: pia intake CITZ:EX
Cc: Tailleir, Roger FIN:EX
Subject: PIA Submission_PTB

Good morning,

Please accept this PIA I'm submitting on behalf of Property Taxation Branch (PTB). This PIA concerns the use of service provider Maximus Canada to operate a Tier 1-level call centre for multiple programs and initiatives. This PIA is being written in conjunction with a CIPA, currently still being worked on.

Thank you,

Pia Dewar, MLIS – Privacy & Security Analyst
Ministry of Finance, Corporate Services, Information Management Branch
Supporting Finance, Office of the Premier, various agencies, boards, & commissions
Cell: 778-678-1921

Lovell, Claire FIN:EX

From: Tailleur, Roger FIN:EX
Sent: July 20, 2018 4:19 PM
To: Lovell, Claire FIN:EX
Subject: RE: PIA: Call Centre Tier One
Attachments: FIN ##### - PIA_PTBTier 1 Final Draft_29june2018.doc

Hi Claire,

Yes, for sure. Here it is. It went to Richard and Pia; I have not heard from them on comments, etc yet, so not sure if they forwarded to PCT.

s.22
Cheers

Roger Tailleur
Policy & Legislative Analyst
Property Taxation Branch
778-698-3878

From: Lovell, Claire FIN:EX
Sent: Friday, July 20, 2018 4:16 PM
To: Tailleur, Roger FIN:EX
Subject: PIA: Call Centre Tier One

Hi Roger,

Just wanted to touch base with you regarding the PIA you were drafting for Tier One for the Call Centre. Are you still drafting or have you submitted it to PCT? Either way, do you mind sharing a copy with me?

Hope you have a good weekend.
Thanks,

Claire Lovell
Project Officer, Intergovernmental Relations
Income Tax Advisory and Intergovernmental Relations
Income Taxation Branch
Ministry of Finance
Phone: 778 698-9665

Lovell, Claire FIN:EX

From: Tailleur, Roger FIN:EX
Sent: May 29, 2018 2:08 PM
To: Clarke, Treana FIN:EX
Subject: RE: PTB SBC/Maximus Pia

Treana,

s.22

just looked at this now. Thanks a lot for your comments and suggested changes; they are very helpful and will make the PIA more accurate and comprehensive and more all-encompassing for future branches to onboard onto Tier 1.

Cheers,

Roger

Roger Tailleur
Policy & Legislative Analyst
Property Taxation Branch
778-698-3878

From: Clarke, Treana FIN:EX
Sent: Wednesday, May 23, 2018 3:13 PM
To: Tailleur, Roger FIN:EX
Cc: Lovell, Claire FIN:EX
Subject: RE: PTB SBC/Maximus Pia

Hi Roger,

Thank you for giving me a chance to review this PIA. I hope my suggested changes add value to the PIA. Given how far along you are with this PIA, I don't want to hold it up any longer and will plan to complete a further PIA in conjunction with the new comprehensive agreement with Service BC that will cover both the call centre and front counter service.

Please let me know if you would like to chat about any of my suggestions/comments.

Thanks,

Treana

From: Tailleur, Roger FIN:EX
Sent: Friday, May 18, 2018 11:16 AM
To: Lovell, Claire FIN:EX; Clarke, Treana FIN:EX
Subject: PTB SBC/Maximus Pia

Here is the draft PIA. Thanks for connecting with me. Please feel free to add to or revise the document. I will hold off on submitting the draft to Richard/PIA for now.

Cheers,

Roger

Roger Tailleur
Policy & Legislative Analyst
Property Taxation Branch
778-698-3878

Lovell, Claire FIN:EX

From: Tailleur, Roger FIN:EX
Sent: May 15, 2018 11:47 AM
To: Lovell, Claire FIN:EX
Subject: RE: PIA covering Service BC contact centre

Hi Claire,

The Friday meeting time is good for me. Okay, I'll meet you in the lobby of the 5th floor at ~ 10:25 this Friday! Until then I will wrap up my draft PIA.

Roger

Roger Tailleur
Policy & Legislative Analyst
Property Taxation Branch
778-698-3878

From: Lovell, Claire FIN:EX
Sent: Tuesday, May 15, 2018 11:28 AM
To: Tailleur, Roger FIN:EX
Subject: RE: PIA covering Service BC contact centre

Thanks Roger,

I just sent you a meeting invite for Friday. If you're unsure where Treana's office is, I can meet you in the lobby of the 5th floor. Also, please let me know if the time is not convenient for you.

Regards,

Claire Lovell
Project Officer, Intergovernmental Relations
Income Tax Advisory and Intergovernmental Relations

From: Tailleur, Roger FIN:EX
Sent: Tuesday, May 15, 2018 9:37 AM
To: Lovell, Claire FIN:EX
Cc: Clarke, Treana FIN:EX
Subject: RE: PIA covering Service BC contact centre

Good morning Claire,

Yes, for sure I'd like to meet with you on this. I am just finalizing the draft PIA so your timing is good. My schedule is mostly open from Wed afternoon onwards this Friday.

Roger

Roger Tailleur
Policy & Legislative Analyst
Property Taxation Branch

From: Lovell, Claire FIN:EX
Sent: Monday, May 14, 2018 1:16 PM
To: Tailleir, Roger FIN:EX
Cc: Clarke, Treana FIN:EX
Subject: RE: PIA covering Service BC contact centre

Hi Roger,

As explained in the e-mail thread below, I am working on writing a new Service Level Agreement with Service BC that will cover the front counter services and Contact Centre. Dawn Mann told me that you are currently working on the PIA for the Contact Centre. In the interest of efficiency, I was hoping to connect with you and see if the PIA could cover both the Contact Centre and the front counter services.

Would you be open to meeting with me and Treana?
Thanks,

Claire Lovell
Project Officer, Intergovernmental Relations
Income Tax Advisory and Intergovernmental Relations

From: Mann, Dawn FIN:EX
Sent: Monday, May 14, 2018 8:59 AM
To: Lovell, Claire FIN:EX
Cc: Clarke, Treana FIN:EX; Seitz, David C FIN:EX; Tailleir, Roger FIN:EX
Subject: RE: PIA covering Service BC contact centre

Good morning Claire,

The program area (PTB) is working on finalizing the PIA for the current interim agreement with the Service BC Contact Centre. Roger Tailleir is the Policy Analyst that has taken the lead on this and has been in communication with Richard Barlow regarding approach.

I'm happy to attend any meeting that you may set up to provide context but would also support you and Treana working directly with PTB to finalize.

Please let me know if you have any questions,

Dawn Mann
Manager, Divisional Projects
Tel: 250.356.6250

From: Lovell, Claire FIN:EX
Sent: Monday, May 14, 2018 8:51 AM
To: Mann, Dawn FIN:EX
Cc: Clarke, Treana FIN:EX
Subject: PIA covering Service BC contact centre

Good morning Dawn,

On April 25, Treana Clarke and I had a meeting with Service BC regarding the negotiations for a Service Level Agreement that will capture both the Service BC front counter services as well as the Contact Centre. This agreement is referenced

in the interim agreement for the Service BC Contact Centre and is intended to eventually supersede the interim agreement.

We have been informed that you are working on the PIA in respect to the Service BC Contact Centre. We would like to connect with you to see if we can include the front counter services in the PIA as well. It would be beneficial to have one PIA covering the relationship with Service BC as well as only having to deal with OCIO's office once on the Common/Integrated Program Agreement piece.

Would you be open to meeting with me and Treana to discuss?

Thanks,

Claire Lovell

Project Officer, Intergovernmental Relations
Income Tax Advisory and Intergovernmental Relations
Income Taxation Branch
Ministry of Finance
Phone: 778 698-9665

Lovell, Claire FIN:EX

From: Clarke, Treana FIN:EX
Sent: May 15, 2018 11:15 AM
To: Lovell, Claire FIN:EX
Subject: RE: PIA covering Service BC contact centre

Friday is better. Yes, we can use my office.

From: Lovell, Claire FIN:EX
Sent: Tuesday, May 15, 2018 11:14 AM
To: Clarke, Treana FIN:EX
Subject: FW: PIA covering Service BC contact centre

Do you have a preference for a meeting time with Roger? Thursday morning or Friday maybe? Also, will we use your office or should I book a boardroom?

Thanks,

Claire Lovell
Project Officer, Intergovernmental Relations
Income Tax Advisory and Intergovernmental Relations

From: Tailleux, Roger FIN:EX
Sent: Tuesday, May 15, 2018 9:37 AM
To: Lovell, Claire FIN:EX
Cc: Clarke, Treana FIN:EX
Subject: RE: PIA covering Service BC contact centre

Good morning Claire,

Yes, for sure I'd like to meet with you on this. I am just finalizing the draft PIA so your timing is good. My schedule is mostly open from Wed afternoon onwards this Friday.

Roger

Roger Tailleux
Policy & Legislative Analyst
Property Taxation Branch
778-698-3878

From: Lovell, Claire FIN:EX
Sent: Monday, May 14, 2018 1:16 PM
To: Tailleux, Roger FIN:EX
Cc: Clarke, Treana FIN:EX
Subject: RE: PIA covering Service BC contact centre

Hi Roger,

As explained in the e-mail thread below, I am working on writing a new Service Level Agreement with Service BC that will cover the front counter services and Contact Centre. Dawn Mann told me that you are currently

working on the PIA for the Contact Centre. In the interest of efficiency, I was hoping to connect with you and see if the PIA could cover both the Contact Centre and the front counter services.

Would you be open to meeting with me and Treana?
Thanks,

Claire Lovell

Project Officer, Intergovernmental Relations
Income Tax Advisory and Intergovernmental Relations

From: Mann, Dawn FIN:EX
Sent: Monday, May 14, 2018 8:59 AM
To: Lovell, Claire FIN:EX
Cc: Clarke, Treana FIN:EX; Seitz, David C FIN:EX; Tailleir, Roger FIN:EX
Subject: RE: PIA covering Service BC contact centre

Good morning Claire,

The program area (PTB) is working on finalizing the PIA for the current interim agreement with the Service BC Contact Centre. Roger Tailleir is the Policy Analyst that has taken the lead on this and has been in communication with Richard Barlow regarding approach.

I'm happy to attend any meeting that you may set up to provide context but would also support you and Treana working directly with PTB to finalize.

Please let me know if you have any questions,

Dawn Mann

Manager, Divisional Projects
Tel: 250.356.6250

From: Lovell, Claire FIN:EX
Sent: Monday, May 14, 2018 8:51 AM
To: Mann, Dawn FIN:EX
Cc: Clarke, Treana FIN:EX
Subject: PIA covering Service BC contact centre

Good morning Dawn,

On April 25, Treana Clarke and I had a meeting with Service BC regarding the negotiations for a Service Level Agreement that will capture both the Service BC front counter services as well as the Contact Centre. This agreement is referenced in the interim agreement for the Service BC Contact Centre and is intended to eventually supersede the interim agreement.

We have been informed that you are working on the PIA in respect to the Service BC Contact Centre. We would like to connect with you to see if we can include the front counter services in the PIA as well. It would be beneficial to have one PIA covering the relationship with Service BC as well as only having to deal with OCIO's office once on the Common/Integrated Program Agreement piece.

Would you be open to meeting with me and Treana to discuss?

Thanks,

Claire Lovell

Project Officer, Intergovernmental Relations
Income Tax Advisory and Intergovernmental Relations
Income Taxation Branch
Ministry of Finance
Phone: 778 698-9665

Lovell, Claire FIN:EX

From: Clarke, Treana FIN:EX
Sent: May 11, 2018 3:57 PM
To: Lovell, Claire FIN:EX
Subject: FW: PIA covering Service BC contact centre

Hi Claire,

Please go ahead and reach out to Dawn Mann. Feel free to use any of the background material I provided Kymbralee. Dawn should already be aware of the comprehensive MOU we have on the go.

Thanks,

Treana

From: Bennett, Kymbralee FIN:EX
Sent: Friday, May 11, 2018 3:55 PM
To: Clarke, Treana FIN:EX
Cc: Lovell, Claire FIN:EX
Subject: RE: PIA covering Service BC contact centre

I understand Roger Tailleur from PTB is working on one in concert with PICS. ☺

Kymbralee Bennett
t: 778.698.5234

From: Clarke, Treana FIN:EX
Sent: Friday, May 11, 2018 3:49 PM
To: Bennett, Kymbralee FIN:EX
Cc: Lovell, Claire FIN:EX
Subject: RE: PIA covering Service BC contact centre

Thank you for clarifying. I understood you were working on a privacy impact assessment which was why I got in touch. I will redirect to Dawn. Thanks so much!

From: Bennett, Kymbralee FIN:EX
Sent: Friday, May 11, 2018 3:02 PM
To: Clarke, Treana FIN:EX
Cc: Lovell, Claire FIN:EX
Subject: RE: PIA covering Service BC contact centre

Hi Treana, thanks for the note and please accept my apology on this very late reply. I'm wondering if I am the right person? Have you connected with Dawn Mann or Keri Taylor in PICS? Although I assisted with the implementation of the Consolidated Call Centre project (C3) PICS is the actual owner of the C3 service with Service BC.

I am happy to help with anything if needed and my calendar is up to date.

Thanks,

Kymbralee Bennett

From: Clarke, Treana FIN:EX
Sent: Friday, May 11, 2018 1:47 PM
To: Bennett, Kymbralee FIN:EX
Cc: Lovell, Claire FIN:EX
Subject: FW: PIA covering Service BC contact centre

I'm looking to set up this meeting. Is there a day/time that would work best for you? Alternatively, Claire can just book using our calendars.

Thanks,

Treana

From: Clarke, Treana FIN:EX
Sent: Friday, May 4, 2018 10:22 AM
To: Bennett, Kymbralee FIN:EX
Cc: Seitz, David C FIN:EX; Lovell, Claire FIN:EX
Subject: PIA covering Service BC contact centre

Hi Kymbralee,

I had a meeting with Service BC last week in relation to the agreement we are negotiating with them that will capture both the Service BC front counter services as well as the Contact Centre. This agreement is referenced in the interim agreement for the Service BC Contact Centre and is intended to eventually supersede that interim agreement.

What I would like is to connect with you on the PIA I heard you are working on in respect of the Service BC Contract Centre to see if we can, at the same time, look to include the front counter piece, and if so, if me and my team can collaborate with you on that PIA.

I think in the long run it would be beneficial to have one PIA covering the relationship with Service BC. It would also be nice to deal once with the OCIO's office or Commissioner's office on the Common/Integrated Program Agreement piece.

Would you be open to meeting with me and Claire to discuss further?

Thanks,
Treana