Better guidance by using continuous taxpayer feedback

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Finnish Tax Administration

Organised in partnership with:
European Commission, European Parliament, General Secretariat of the Council of the European Union, Joint Services of the European Economic and Social Committee and the Committee of the Regions & Translation Centre for the Bodies of the European Union.

Clear writing for Europe 2021

Our communication goals

The customers of the Finnish Tax Administration consist of

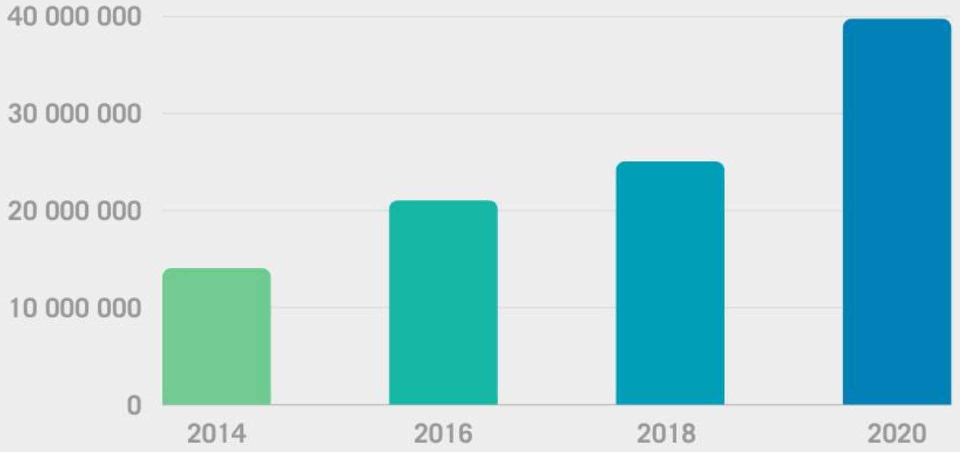
- 5,1 million individual taxpayers
- 454 00 corporate taxpayers
- 248 000 business taxpayers
- 107 000 agricultural operators

Our communication goals are

- to enable taxpayers to act correctly on their own initiative
- to make taking care of tax matters as easy as possible
- to ensure the collection of tax revenue.

We constantly improve and maintain our customer understanding and steer our operations accordingly.

Customers 2020



39,7m

tax.fi visits

38% mobile phone or tablet
53% via search engines

Top10
online brands
in Finland

OmaVero

3 million
unique customers

73,5%
of tax cards

135 500
MyTax messages

83%
of tax returns

551 130
chat conversations

of which our chatbot
managed 319 000

2,1 million
answered phone calls

292 000
tax office visits

Automation is the best service!

We sent 4.9 million pre-completed tax returns, only 1.4 million needed to make corrections

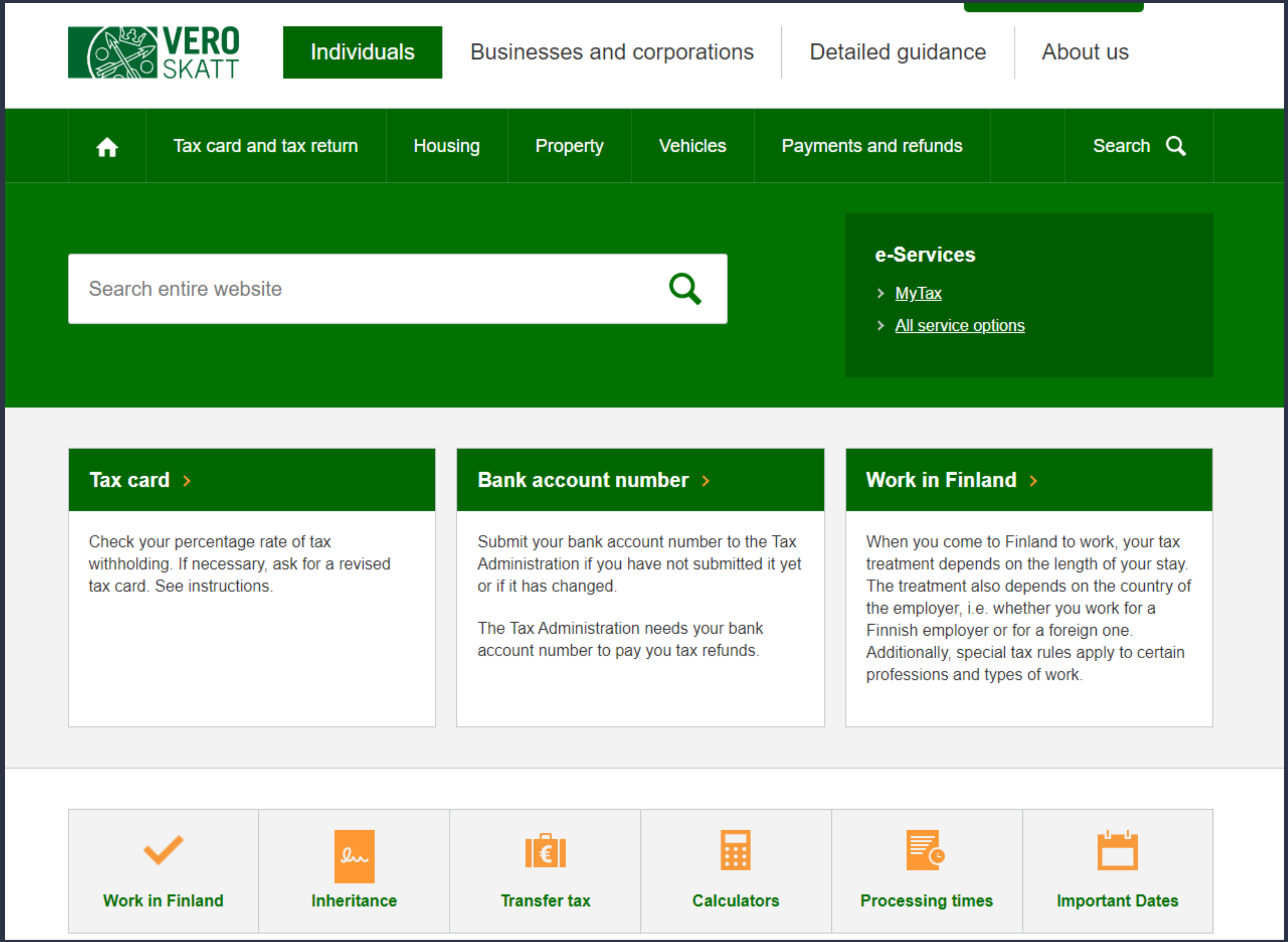
Customer channels 2020

89 % in MyTax
10 % phone calls
1 % tax office visits

Since most people manage their taxes themselves, written guidance is important

Tax.fi

- 4 000 pages in Finnish
- Almost 4 000 pages translated into Swedish
- Some parts in English
- 40 million visits per year
- [Visit tax.fi](https://www.vero.fi/en/)

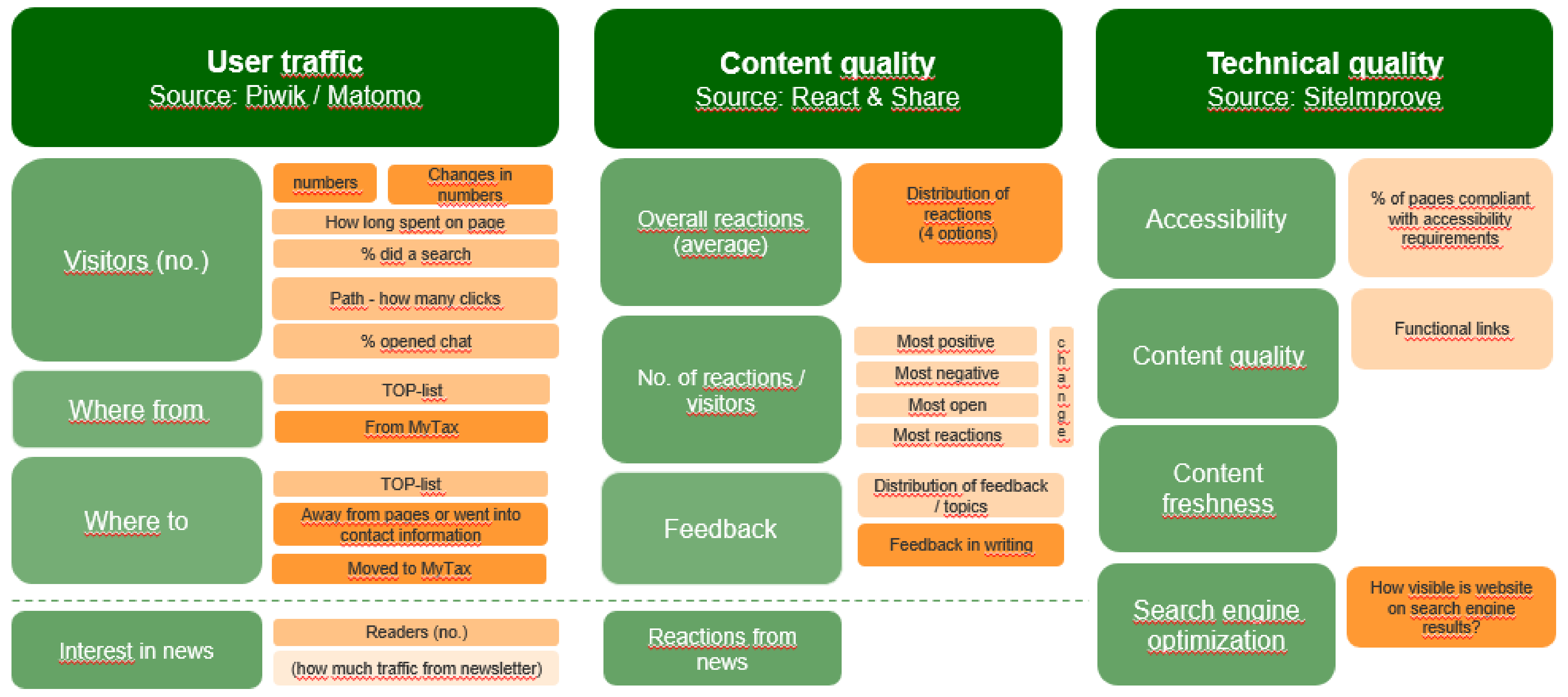


Developing with data

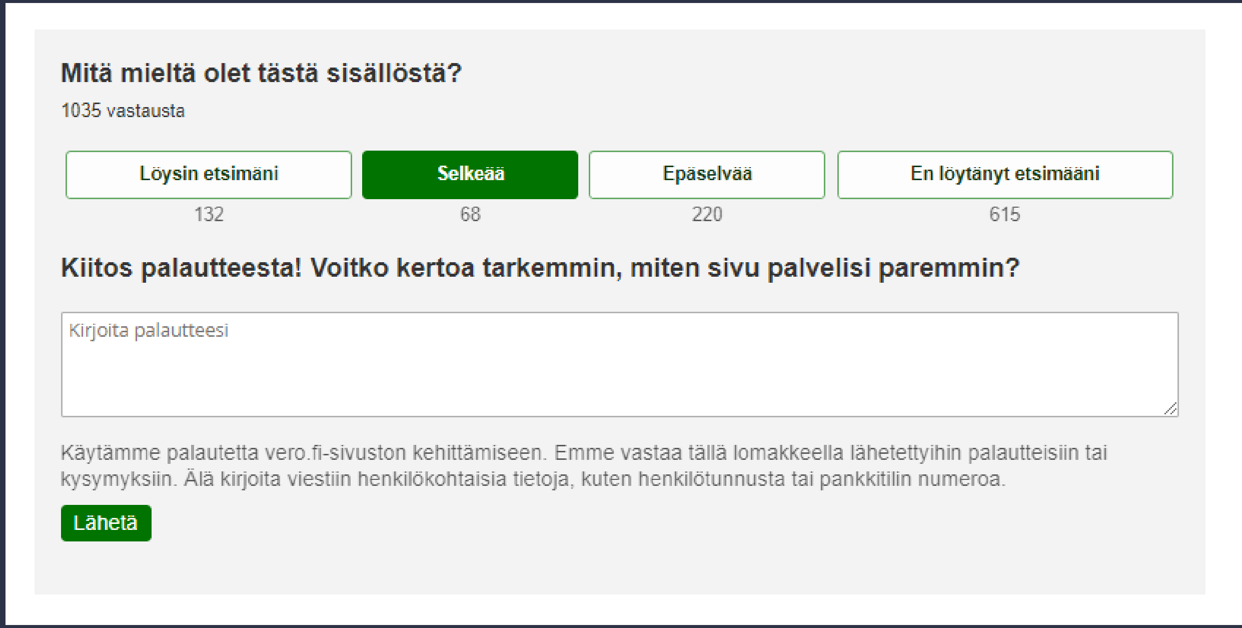
We use different kinds of data in developing our content

- Customer testing of our texts
- Analyzing published content with 3 different data sources:
  - Piwik (user traffic)
  - React and Share (customer reactions, content quality)
  - Siteimprove (accessibility, technical quality)
- Chatbot conversations - very useful for discovering which words and expressions tax payers use
- Feedback from customer service (phone, tax office)

Our analytics tools



Numbers don't tell enough


Mitä mieltä olet tästä sisällöstä?

1035 vastausta

Löysin etsimäni	Selkeää	Epäselvää	En löytänyt etsimääni
132	68	220	615

Kiitos palautteesta! Voitko kertoa tarkemmin, miten sivu palvelisi paremmin?

Kirjoita palautteesi

Käytämme palautetta vero.fi-sivuston kehittämiseen. Emme vastaa tällä lomakkeella lähetettyihin palautteisiin tai kysymyksiin. Älä kirjoita viestiin henkilökohtaisia tietoja, kuten henkilötunnusta tai pankkitilin numeroa.

Lähetä

On most guidance pages readers can tell by pushing a button

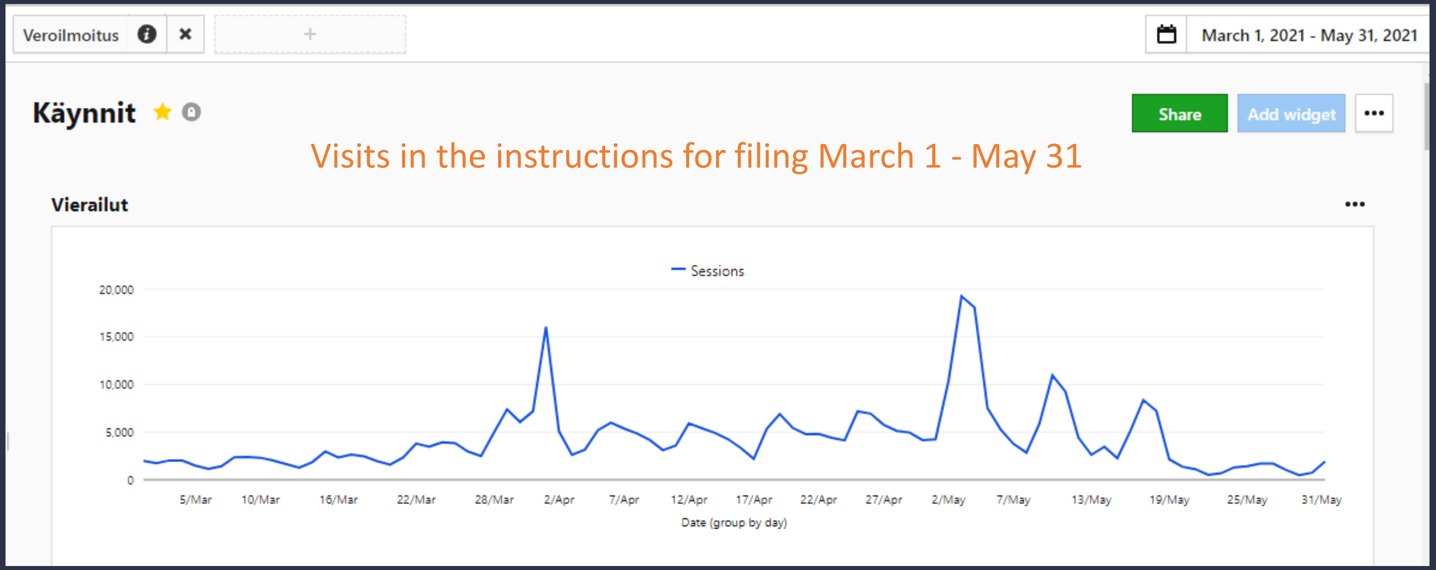
- whether they have found the right information
- if the content is clear.

They can also give feedback in writing.

The freely formulated answers are the most useful in developing content! Otherwise we would have to guess why the reader didn't find the information.

Example: Instructions for filing the tax return

- Individual taxpayers get their pre-completed tax returns every spring. They can make corrections in it between March and May.
- We pay special attention to the feedback in the spring, because unclear guidance adds to the customer service's workload.



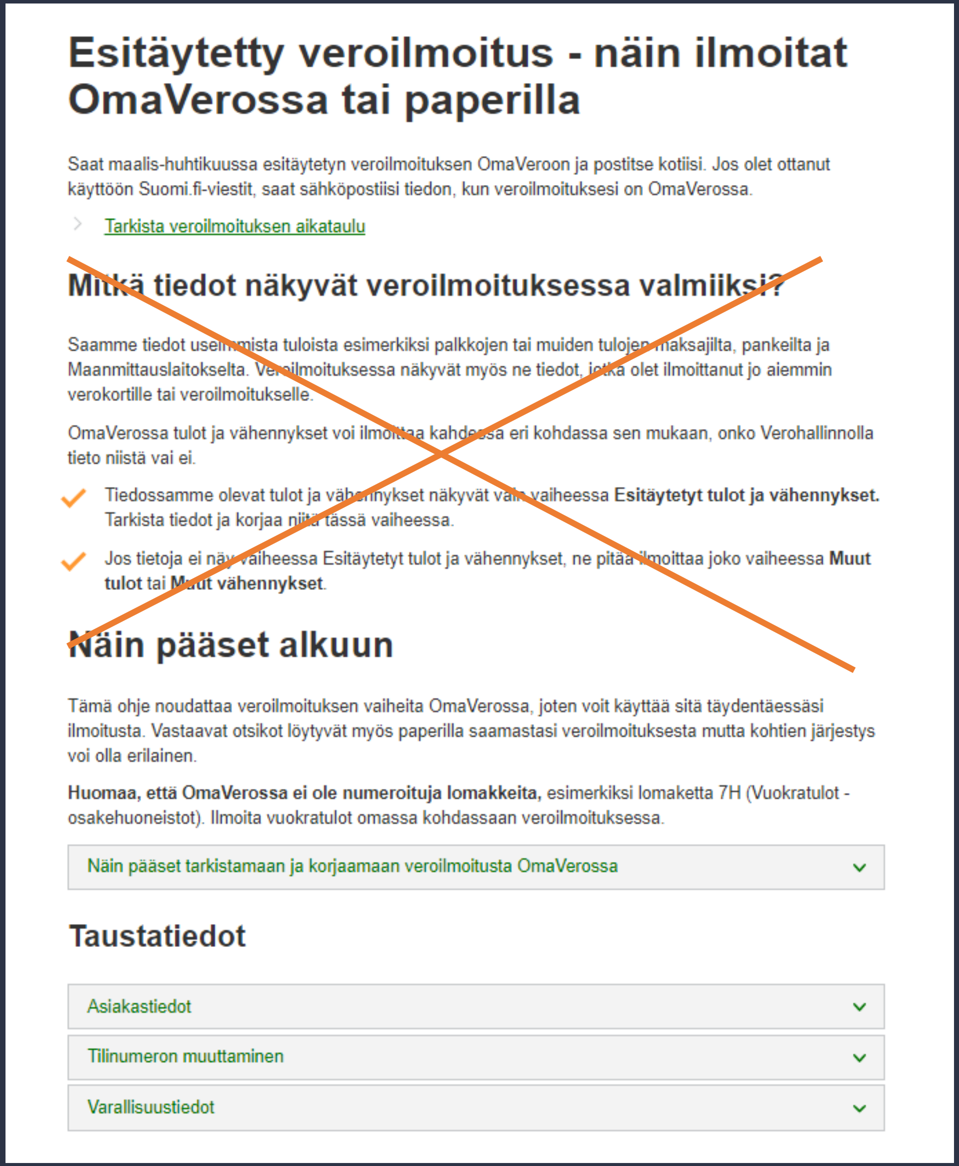
The due dates for the tax return 2021:
2 April
4 May
11 May
18 May

Busiest days in tax.fi, chat and customer service are the days before the due date.

New guidance based on customer feedback

- We made a new guidance on the basis of feedback from the previous year - the need to it arose from our customers.
- See the instructions for filing

- Before publishing, we had the guidance tested by a test group
  - Five people were asked to report certain income and certain deductions in their tax return.
  - We monitored how the test participants moved around in the guidance, which parts were unclear and if the guidance was sufficient for getting the task done.



Esitäytetty veroilmoitus - näin ilmoitat OmaVerossa tai paperilla

Saat maalis-huhtikuussa esitäytetyn veroilmoituksen OmaVeroon ja postitse kotiisi. Jos olet ottanut käyttöön Suomi.fi-viestit, saat sähköpostiisi tiedon, kun veroilmoituksesi on OmaVerossa.

› Tarkista veroilmoituksen aikataulu

Mitkä tiedot näkyvät veroilmoituksessa valmiiksi?

Saamme tiedot useimmista tuloista esimerkiksi palkkojen tai muiden tulojen maksajilta, pankeilta ja Maanmittauslaitokselta. Veroilmoituksessa näkyvät myös ne tiedot, jotka olet ilmoittanut jo aiemmin verokortille tai veroilmoitukselle.

OmaVerossa tulot ja vähennykset voi ilmoittaa kahdessa eri kohdassa sen mukaan, onko Verohallinnolla tieto niistä vai ei.

- Tiedossamme olevat tulot ja vähennykset näkyvät vain vaiheessa **Esitäytetyt tulot ja vähennykset.** Tarkista tiedot ja korjaa niitä tässä vaiheessa.
- Jos tietoja ei näy vaiheessa Esitäytetyt tulot ja vähennykset, ne pitää ilmoittaa joko vaiheessa **Muut tulot** tai **Muut vähennykset**.

Näin pääset alkuun

Tämä ohje noudattaa veroilmoituksen vaiheita OmaVerossa, joten voit käyttää sitä täydentäessäsi ilmoitusta. Vastaavat otsikot löytyvät myös paperilla saamastasi veroilmoituksesta mutta kohtien järjestys voi olla erilainen.

Huomaa, että OmaVerossa ei ole numeroituja lomakkeita, esimerkiksi lomaketta 7H (Vuokratulot - osakehuoneistot). Ilmoita vuokratulot omassa kohdassaan veroilmoituksessa.

Näin pääset tarkistamaan ja korjaamaan veroilmoitusta OmaVerossa

Taustatiedot

Asiakastiedot

Tilinumeron muuttaminen

Varallisuustiedot

What did we do based on the test?

- Some of the text was cut down - the test participants didn't bother to read it!
- Clarity also means that the cognitive load for the reader is made smaller - the central facts can be identified more easily.
- We used fewer links going out from the page because the participants started to wander around the website and didn't get back to the guidance.
- The text itself was found quite clear - provided that one takes the trouble and reads it

The guidance was improved throughout the spring

- During the tax return season, we monitored which questions people asked in our website and the chat.
- Often the unclear things were very simple
  - How do I add attachments to my tax return?
  - Where do I report the costs for face masks?
  - How do I deduct the costs for furniture bought for working from home?
  - Where can I see if my return has arrived?
  - How long does the processing of my tax return take?

The pre-completed tax return – making corrections in MyTax or on paper

In March or April, you will receive your pre-completed income tax return in MyTax and by post. If you have activated Suomi.fi messages, you will receive an e-mail message when the return is ready for viewing in MyTax.

> See the planned schedule for tax return submittal

Topical issues

How long does it take to process my tax return?

Where can I find the tax decision in MyTax?

Check the tax return. If there is something that you must add to or correct in your tax return, make the changes in MyTax or file them on paper forms. If there is nothing to add or correct, you do not have to do anything.

The order of sequence below is the same as the way the pages in MyTax are ordered. It is not entirely the same order as the paper version. However, the text below covers all the sub-headings and sections of the paper form.

Please note that your tax return in My
Rental income – Apartments in a housi
having to fill in many numbered forms f
the appropriate sections in MyTax. Ther

Logging in to MyTax to make checks

Background infor

Taxpayer details

Notice of a bank account number cha

Details on assets

For example, we added frequently asked questions to the guidance to get more attention

Look up the amounts of the deductions

Workspace deduction

When you work remotely, you can claim a deduction – two alternative options are available:
A. Workspace deduction based on a formula
B. The actual cost of your workspace, furniture, etc.

This means that you cannot claim both these deductions on your tax return.

A. Workspace deduction based on a formula

You can get the formula-based, standard deduction for workspace expenses even if you have no specific area where you would regularly set up a "home office". You do not have to give grounds for your claim.

The amount of the workspace deduction depends on the number of days you work remotely.

The standard deduction covers the rent for the workspace and its lighting, electricity, heating and cleaning. **The amount also covers the cost of furniture; a desk and a chair are typical deductible pieces of furniture.** If you claim the formula-based deduction, you cannot claim separate deductions relating to the prices you had paid for the pieces of furniture.

If two **spouses** both work from home in their shared home where they live together, both can claim the formula-based deduction – see table below.

We regrouped the content because our readers did not understand how to deduct furniture costs for working from home.

We added words that people use, such as *desk, chair* - the word *furniture* alone was too abstract.

Using MyTax to make corrections or to add information

The **Pre-completed income and deductions** section contains the information that has been available to the Tax Administration on your expenses. If any corrections and additions must be made, tick the box for means of transportation first (public transport, other than public transport, or a combination of both), then make the required changes to the return. If just a part of the year's expense is showing, select Add new travel expense to fill in the amounts that are missing.

Enter the costs for **face masks** together with the commuting expenses under Public transport – Time period's travel expenses for public transport.

If no commuting and travel is found under Pre-completed deductions, fill in the **Other deductions** section as appropriate. Select Travel expenses first, then click on **Add new travel expense.**

We added more information because taxpayers asked how to report costs for face masks.
The key word was highlighted.

Repayment deduction

Pension that has been reclaimed or a social benefit that has been reclaimed – such as a daily allowance or a student grant – can be filled in here.

If the payers of pension and benefits have demanded that you repay an amount to them, fill in the amount that you repaid.

We must use the same terms as in our e-service MyTax, even though the terms are difficult sometimes. Here we explained the term *social benefit* by adding concrete examples "daily allowance or a student grant"

Conclusions

- Contents must be improved continuously. A text cannot remain static for years – customer feedback must be monitored on a regular basis.
- A text must follow the reader’s view and be written in a language they understand – not in legal or expert language.

Everything cannot be solved by communication

- You can write clear guidance for using an e-service, but the e-service itself must be easy to use, making guidance unnecessary.
- If operation in other areas does not support the e-filing (for example authorisation is difficult), people will use paper forms - guidance alone is not enough.
- The whole organisation must embrace customer orientation

Thank you!

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VERO
SKATT