

FI Community Phoenix Impact Study – April 2017

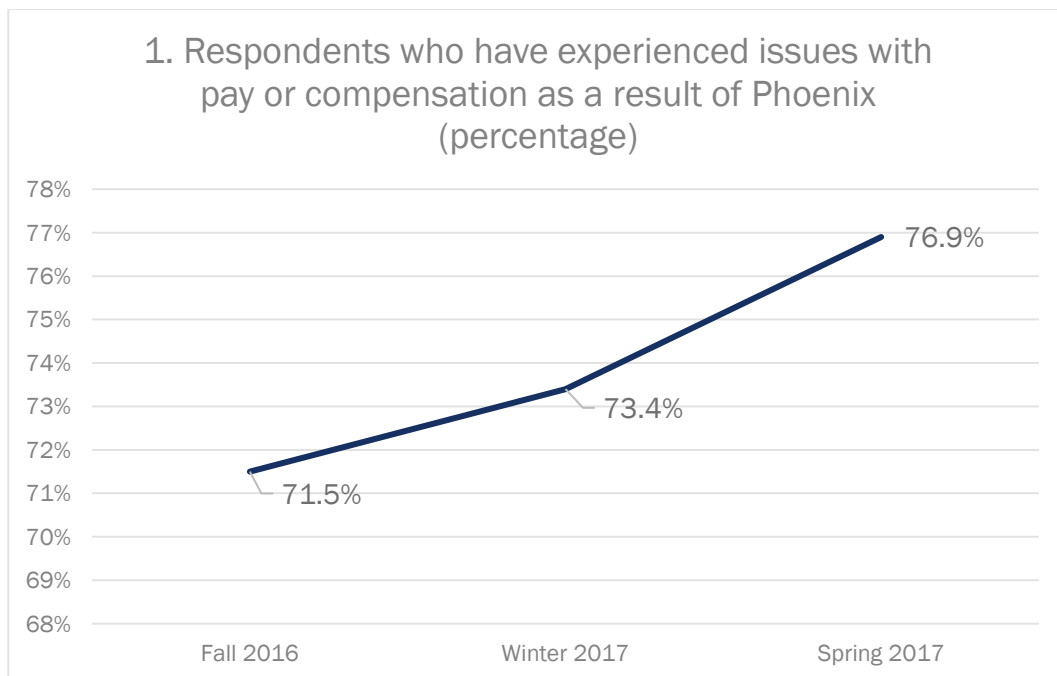
Introduction

From March 29 to April 11, a third survey for the FI Community Phoenix Impact Study made up of 21 questions was circulated to the FI Community. The first survey was issued to the FI Community in November 2016 and the second survey was issued in January 2017. The purpose of this follow-up survey was to continue to gather tangible figures on the effects of the broken Phoenix payroll system, to track any T4 or Relevé 1 tax slip issues, to continue to track the impact of Phoenix on worker mental health and work/life balance and to continue to evaluate changes since the November study.

A complete list of questions from the survey can be found [here](#). Footnotes indicate the survey question to which the statistic refers.

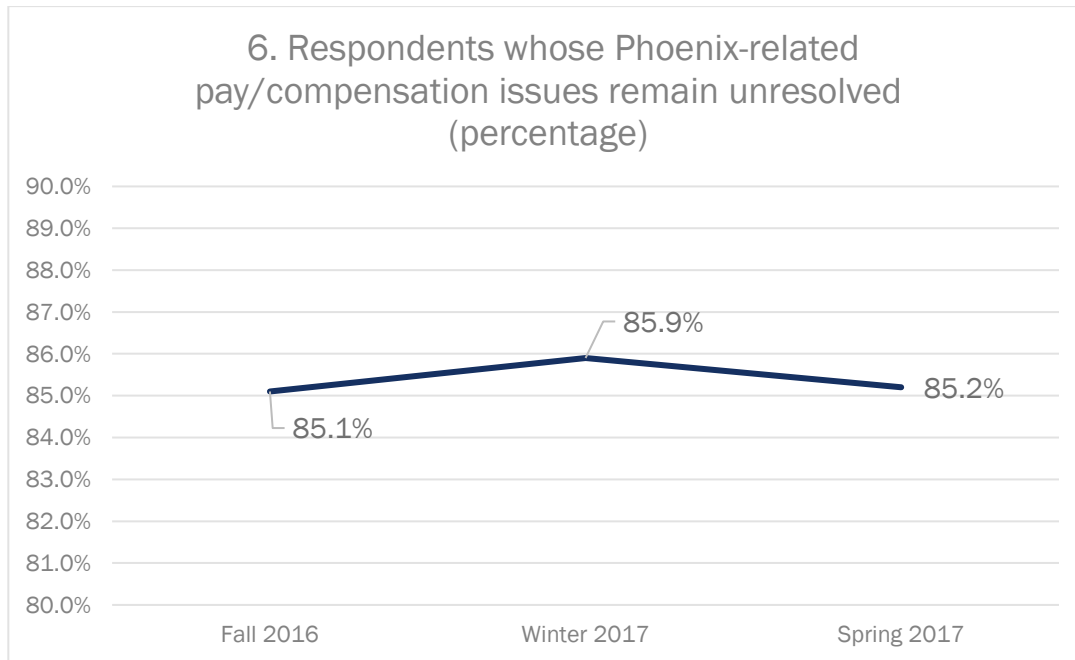
Of the 4,700 FIs in the FI Community, some 4,500 received the survey and 933 FIs across 60 departments completed it. This gave the survey a response rate of approximately 21% and a strong statistical significance of 95% +/- 3%. Of the 933 responses, 74% of respondents indicated they had completed one of the previous Phoenix surveys published by ACFO.¹⁸

Pay and compensation issues



Of the 933 respondents, 716 FIs (77%) indicated they have experienced issues with pay or compensation as a result of Phoenix.¹ As shown in the chart above, the percentage of FIs affected by Phoenix has increased 5% since Winter 2017 and nearly 8% since Fall 2016.

Among the FIs affected, the most common issues experienced included acting pay (51%), base pay (29%), delays in increment pay (28%) and CPA dues reimbursements (22%).² The largest percentages of issues that remain unresolved are issues with bilingual bonuses (84% reported cases unresolved) and acting pay (82% unresolved).⁷

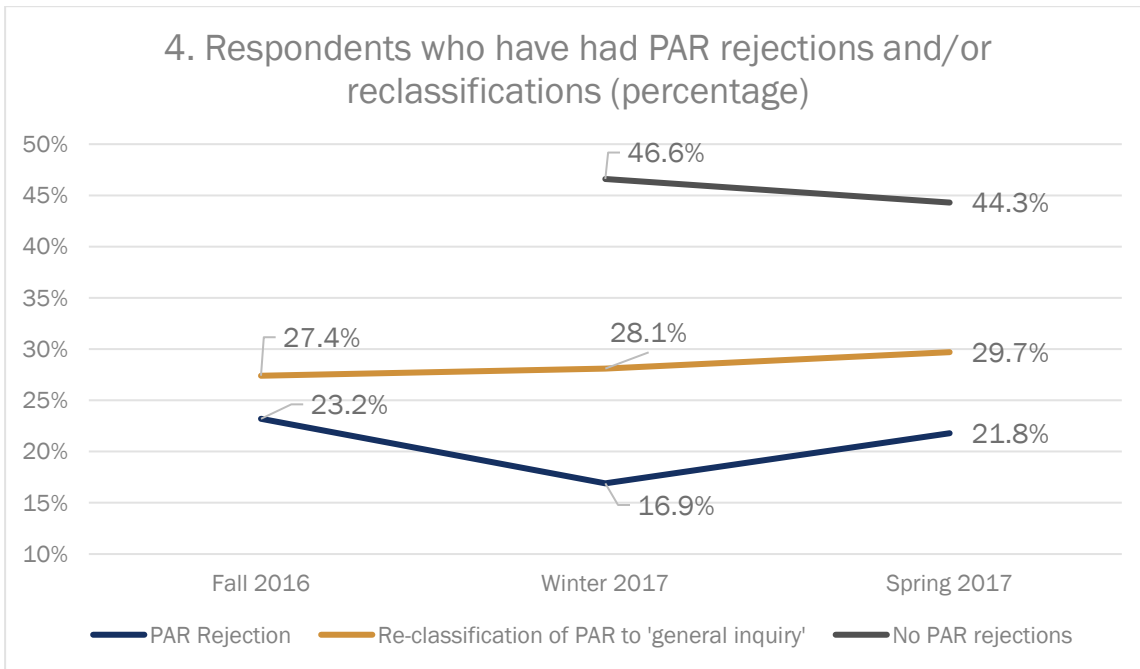


85% of FIs who have experienced pay or compensation issues still have issues outstanding.⁶ As shown by the chart above, little change in the percentage of unresolved issues has occurred since Fall 2016.

Pay Centre interaction

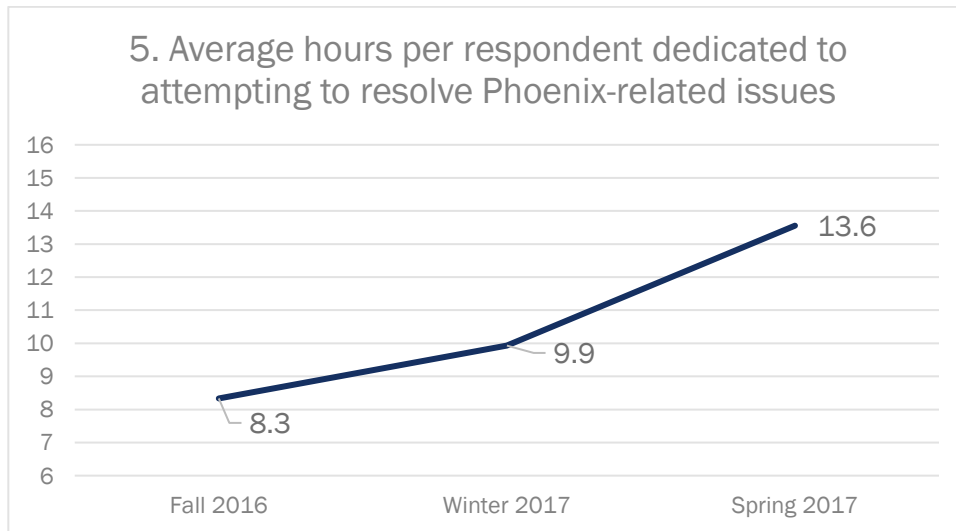
Approximately 92% of respondents who have experienced issues with their pay or compensation have contacted either the Pay Centre or their compensation advisor to attempt to resolve their issues, while 46% of respondents have contacted them 5 times or more.³

In addition, among the FIs who reported having contacted the Pay Centre or their compensation advisor, 22% reported one of their PARs (Pay Action Requests) had been rejected, while 30% have been asked by the Pay Centre to re-submit their PAR as a 'general inquiry'.⁴ These PAR rejections mean requests are sent to the back of the line, resulting in significant delays towards resolving pay issues, and the re-classification of PARs to 'general inquiries' means its priority level drops and further delays are incurred. Whether these cases are included in the Pay Centre's reported backlog still remains unclear.



As shown by the chart above, the number of respondents who reported PAR rejections decreased from Fall 2016 to Winter 2017 (down 27%), but increased once again in Spring 2017 to 22% (up 29%). Meanwhile, re-classifications of PARs have moderately increased since Fall 2016 (up 8%) but the percentage of respondents whose PARs have never been rejected has decreased since Winter 2017 (down 5%, data unavailable for Fall 2016).

Time and money lost to Phoenix

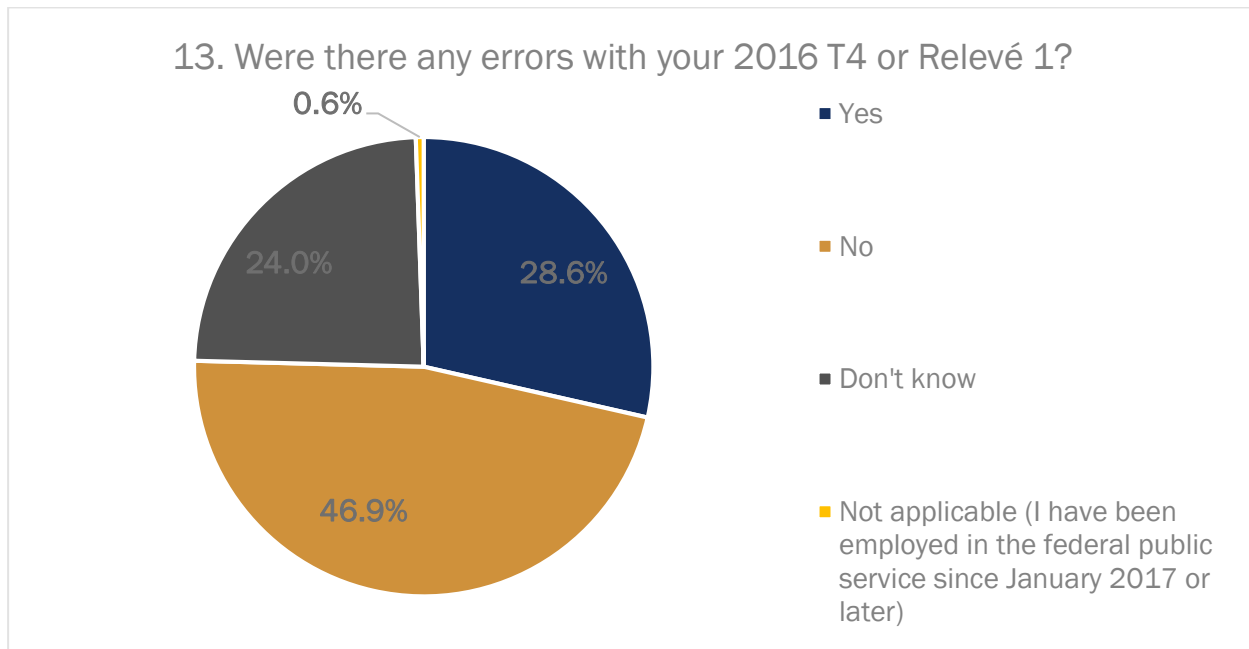


More than 9,000 hours were reported lost by respondents attempting to resolve their personal Phoenix-related issues (382 days).⁵ An additional 885 hours (37 days) have been lost since January.

As shown by the chart on the previous page, the average hours per respondent dedicated to resolving Phoenix issues has increased 37% since Winter 2017 and 64% since Fall 2016.

Furthermore, 20% of FIs who have experienced issues with their pay have incurred out-of-pocket expenses due to Phoenix⁸ (unchanged since Fall 2016 and Winter 2017) with more than \$130,000 in total out-of-pocket expenses reported at an average of approximately \$1,000 per person.⁹

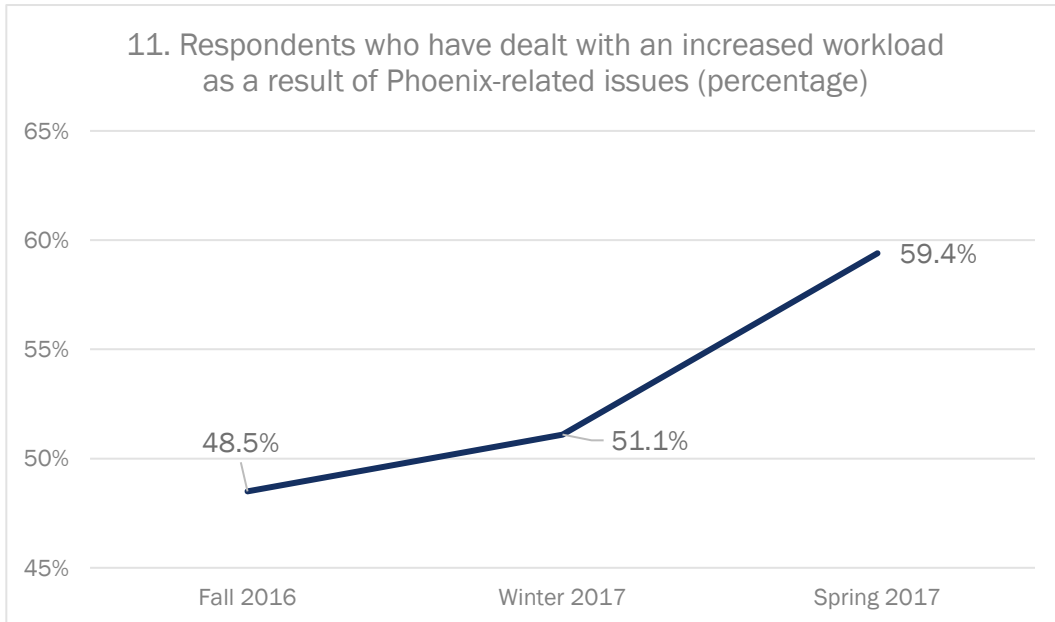
Tax slip issues



As per the chart above, 29% of respondents indicated they had errors with their 2016 T4 or Relevé 1 tax slips.¹³ Among respondents who reported in Question 1 that they had Phoenix issues, 32% had errors on their tax slips. Prior to 2016, less than 5% of respondents had experienced errors.¹²

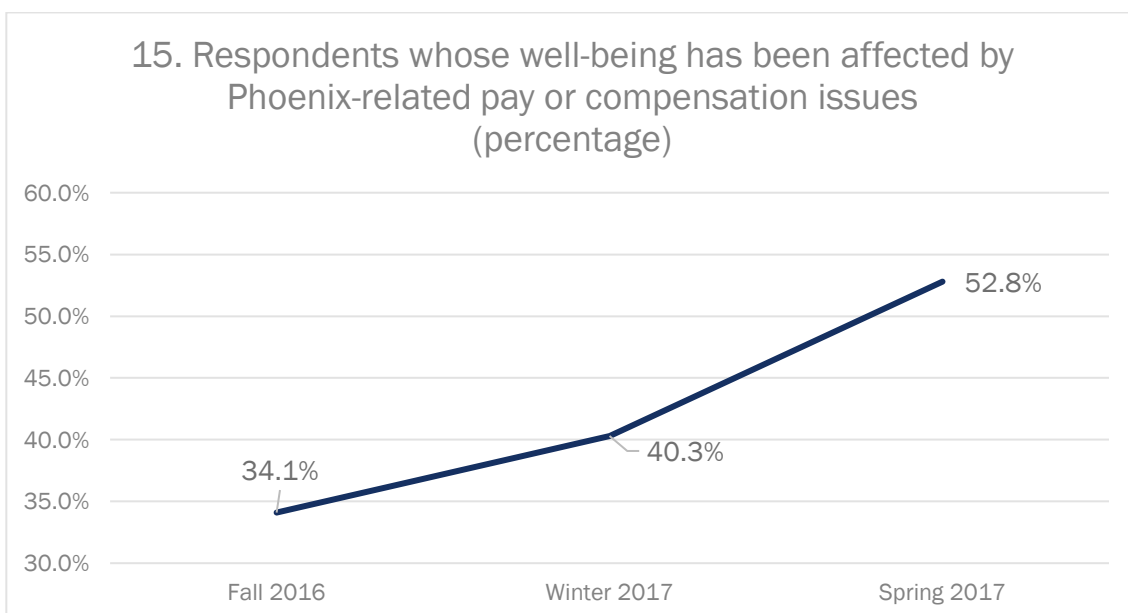
In addition, among those who had experienced errors with their 2016 tax slips, only 22% had the errors amended and 73% still had incorrect tax slips.¹⁴

Work/life balance issues



According to the chart above, nearly 60% of respondents indicated that they have dealt with an increased workload due to Phoenix.¹⁴ This number has increased 16% since Winter 2017 and 22% since Fall 2016.

In addition, among the FIs who use the Phoenix pay system, 68% felt they had not received sufficient training on how to use it.¹⁷ This number is up 5% from the 65% who reported insufficient training in Winter 2017.



As per the chart on page 5, more than half of respondents have seen their mental well-being affected by Phoenix.¹⁵ This is a troubling increase of 31% since Winter 2017 and 55% since Fall 2016. Among those who indicated in Question 1 that they had experienced pay or compensation issues due to Phoenix, 58% indicated their mental health has been affected.

Among the FIs who have seen their mental health affected, dozens have seen a practitioner (6%), sought medical assistance (4%) or taken stress leave (8%) to cope.¹⁶ Although the number of FIs whose mental health has been affected has increased, the number of FIs who have taken action towards resolving their mental health issues has not changed.

Conclusion

The last survey question asked FIs for details about the issues they've experienced with Phoenix and more than 400 FIs told their stories. By providing the option for FIs to include their name and contact information, a number of Labour Relations case files were established to assist FIs in solving their issues.

Based on the Spring 2017 FI Community Phoenix Impact Study results, while Public Services and Procurement Canada (PSPC) reports improvements, it is evident that the effects of the broken Phoenix pay system are only getting worse. Since the November study was released, not only are key conditions not improving, such as the percentage of Phoenix issues that have been resolved, but far too many conditions have deteriorated, including the number of pay issues that have occurred, the number of unresolved issues, re-classified PARs, time and money lost, workload and mental health. Public Services and Procurement Canada (PSPC) must therefore step up their response to the Phoenix debacle in order to prevent these issues from worsening.

The survey will be used to further inform senior management at PSPC and at the departmental level about the worsening effects of Phoenix on the FI Community and to hold the government accountable for fixing the Phoenix pay system.