



STATE OF CALIFORNIA  
**Franchise Tax Board**

# Filing Season Update

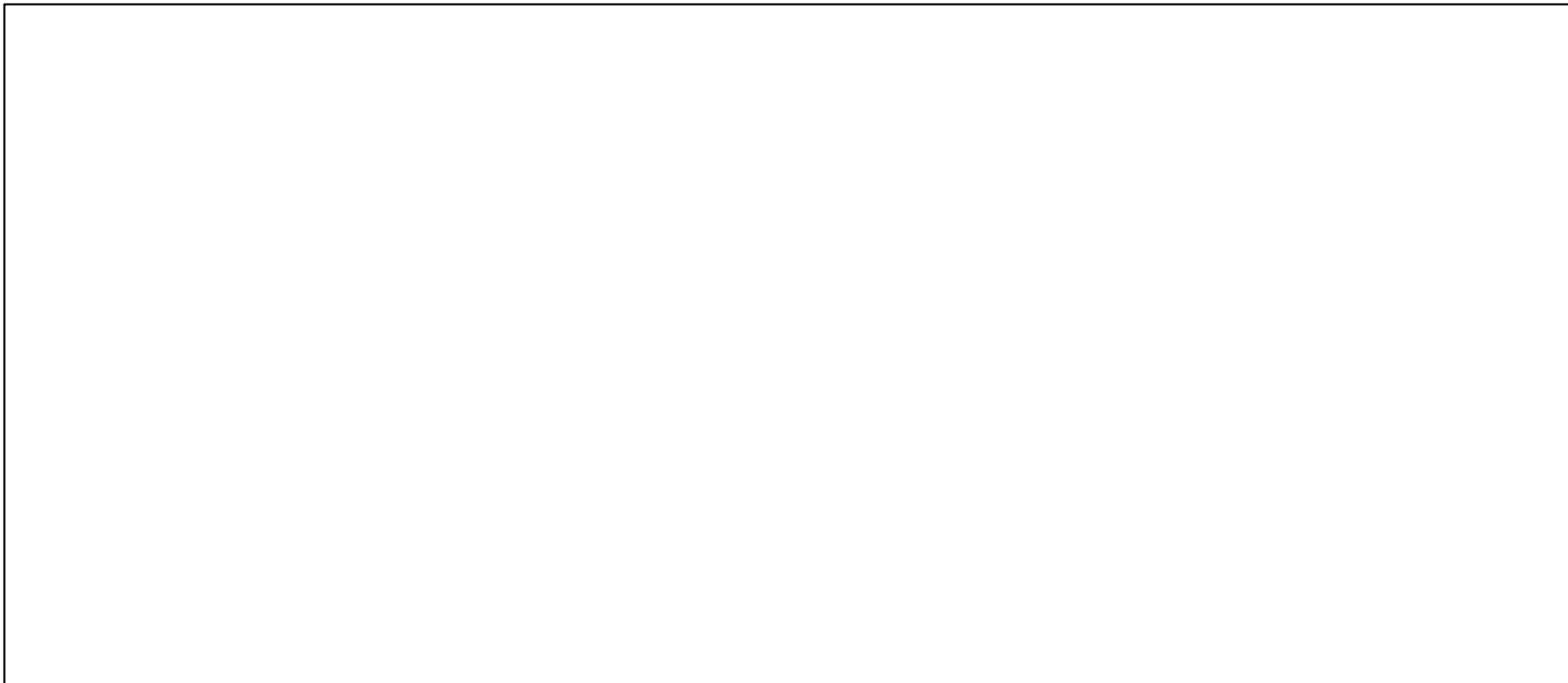
Matt Feaster – Filing Division

Frank Curcuro – Accounts Receivable Management Division

June 13, 2019

# Filing Season Update

## **Filing by the Numbers Video**



# Filing Season Update

## 2019 Filing Season Records

- Electronic Payments

<b>Electronic Payments</b>	<b>2018</b>	<b>2019</b>	<b>+/- Change</b>
# of Electronic Payments	3.1 M	3.6 M	+15%

# Filing Season Update

## 2019 Filing Season Records

- Refund Processing Times

<b>Refund Received</b>	<b>2019</b>
Within 14 Days	<b>88%</b>
Within 30 Days	<b>98%</b>

# Filing Season Update

## **2019 Filing Season Readiness**

- Perfect Storm Mitigation – Enterprise effort
- Careful preparation for Federal Tax Reform

# Filing Season Update

## Perfect Storm Stats

- Processing Day Planning
  - Projected increases in traffic and e-file activity to our critical systems
    - Successfully handled the load
  - Projected a 15% increase in secure data transfers
    - Increase was 16% (130K)
  - Projected 438K visits to our website
    - Record high received 442k
  - Received \$2 billion in web based payments between 12:01am and 3:00pm

# Filing Season Update

## Perfect Storm Stats

- Processing Day Records – April 15, 2019
  - Processed 570K e-file and paper returns
  - 365K payments processed
  - 22 hours to process e-filed returns
  - 29 hours to process paper returns

# Filing Season Update

## 2019 Filing Season Service

- Level of Access
  - 352,000 calls received
  - 73% phone access rate
  - 6 minute average wait time



# Filing Season Update

## **2019 FTB VITA Highlights**

- 142 FTB volunteers
- 54 new volunteers this year
- Assisted taxpayers at 25 community sites
- Filed 19,000 State and Federal returns
- Over 2600 volunteer hours
- Estimated \$453,000 in tax prep savings

# Filing Season Update

## **2019 FTB CalEITC Highlights**

- 52 successful CalEITC e-bus VITA events
- 19 Partners
- Almost 8,400 miles traveled

# Filing Season Update

## What Our Partners Are Saying

### Possible Quotes:

- “The FTB VITA Training we had at the beginning of the year was excellent!
- “The E-bus made preparing taxes fun! The customers were very comfortable and enjoyed the experience which otherwise could be somewhat intimidating.”
- “The bus driver was great! Plus, the bus was a great visual and added to the event excitement.”
- “Booking the e-bus was a fantastic experience. FTB staff made the experience painless. We would definitely use the bus again!”

# Filing Season Update

## 2019 CalEITC Highlights

<b>CalEITC Highlights</b>	<b>2018</b>	<b>2019</b>	<b>+/- Change</b>
Allowed Claims	1.3 M	<b>1.9 M</b>	<b>+ 42%</b>
Amount Allowed	\$308 M	<b>\$348 M</b>	<b>+ 13%</b>

# Questions?