



STATE OF CALIFORNIA  
**Franchise Tax Board**

# 2019 Filing Season Readiness

## **Technology and Operations**

Jared Johnson - Technology Services Division

Roger Lackey - Filing Services Division

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# 2019 Filing Season Readiness

- Operations and Services: Past vs. Present
- 2018 Highlights
- Annual Planning Process
- 2019 Readiness

# 2019 Filing Season Readiness

Paper Dependent Processes

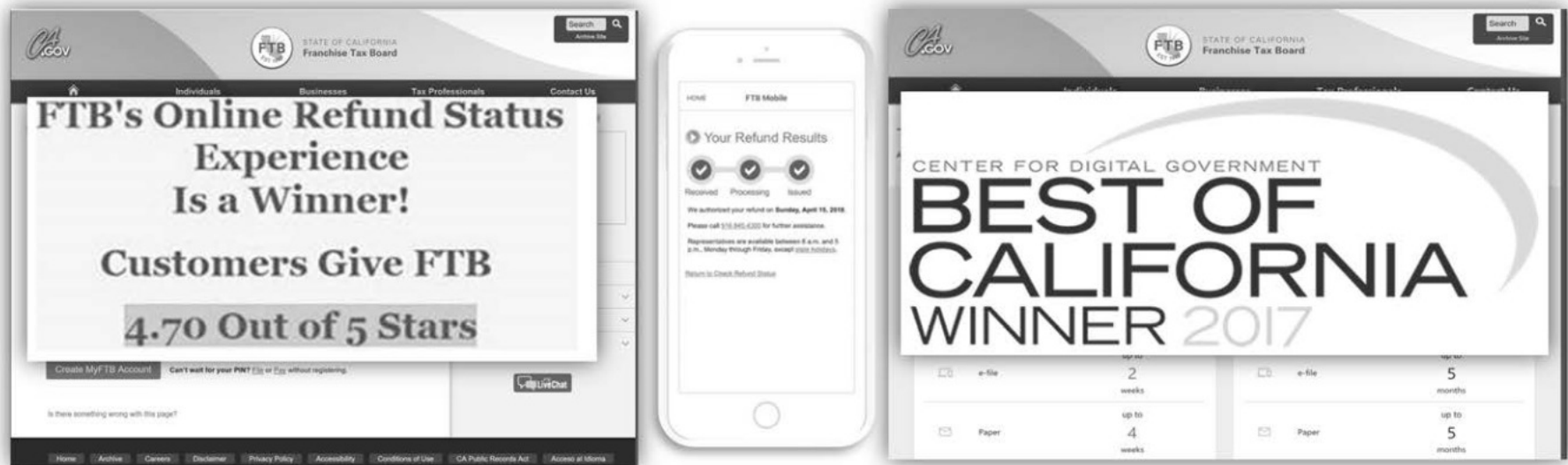
That was then...

**[Photos]**

# 2019 Filing Season Readiness

Secure, Accurate and Efficient Digital Services

This is now...



## 2018 Filing Season Highlights

- FTB's critical 24x7 digital Services were 99.9% available
- 1.2 million returns and payments received on April 18, 2018
- 99,200 new MyFTB registrations (492,000 total since 2016)
- 4.6 million users of our Refund Status Applications

# 2019 Filing Season Readiness

## Annual Planning Process

- Filing Season Readiness:
  - It's an Enterprise effort....EVERYONE contributes
  - Thousands of tasks managed like a project
  - People, Process and Technology

## 2019 Filing Season Readiness

### **Annual Planning Process: The Role of Technology**

- Conscious Shift to digital services
- Self-service and faster results
- Business and Technology are seamlessly integrated
- Secure, accurate and stable services
- Innovative solutions to meet unique challenges

# 2019 Filing Season Readiness

## **2019 Readiness - Challenges**

- Federal Tax Reform
- Perfect Storm
- Expansion of CalEITC



# 2019 Filing Season Readiness

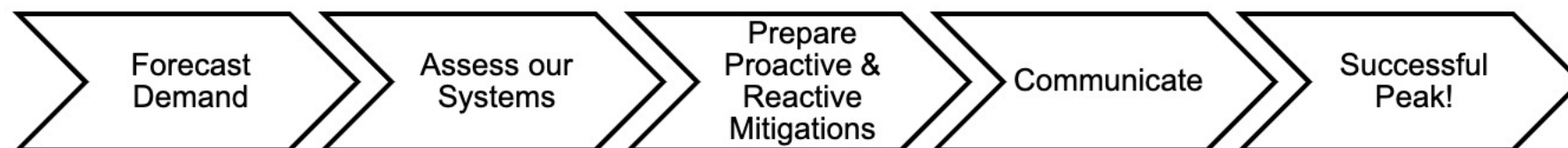
## **Federal Tax Reform**

- Analysis of impacts on California Income Tax Laws and Tax Forms
- Outreach/Collaboration –Tax Professionals and Tax Software
- Taxpayer Service Training – Over 600 Public Facing Staff trained
- Filing Season Marketing Campaigns

# 2019 Filing Season Readiness

## Perfect Storm

- A perfect storm happens when Filing Deadline falls on a Monday.



**[Graphics]**

## 2019 Filing Season Readiness

### **Expansion of CalEITC**

- \$10 Million in grant money increases our outreach
- More e-Bus events than ever!
- Shipping 1.5 million CalEITC brochures, posters and postcards
- 11-part VITA video training series

# Questions?