Slide 1: Filing Season Update
Presenter(s) Name(s): Yvonne Crankfield – Filing Division and Frank Curcuro – Accounts Receivable Management Division
September 18, 2020

Slide 2: Filing Season Update
COVID-19 Pandemic
- Closed public counter field offices in March
- Limited Volunteer Income Tax Assistance (VITA) locations

Slide 3: Filing Season Update
Impacts to Taxpayers
- Disaster Strike Force Team and Filing Season Action Team
- Extend tax filing and payment deadlines
- Postponement period
- Provide relief for nonresidents

Slide 4: Filing Season Update
Postponement Period
- FTB proactively provided relief
- Updated website regarding CalEITC and Young Child Tax Credit
- System changes to accept tax returns and payments
- No penalties or interest during postponement
- Assisted with scheduled Electronic Fund Transfers (EFT)

Slide 5: Filing Season Update
Postponement Period (continued)
- Delayed audit and filing enforcement activities
- Temporarily accepted electronic signatures on Statute of Limitation waivers
- Granted extensions to respond to document requests
- Delayed noticing and assessments
- Partnered with IRS

Slide 6: Filing Season Update
Delayed Collection Action
- Suspended wage attachments, bank levies, liens, collection phone calls, and field calls
- Delayed suspension of business entities
- Delayed publication of our Top 500 list
- Extended hardships
• Allowed for skip payments for Installment Agreements

**Slide 7: Filing Season Update**

Delayed Collection Action (continued)
• Suspended offsets
• Established alternate methods for Revivors and Individual Status letters
• Published external communication for our customers

**Slide 8: Filing Season Update**

Essential Services
• Public counter field offices reopened June 15
• Customers request field office appointments
• 3,500 field office appointments since June 15
There is a photo of a woman getting services at the public counter.

**Slide 9: Filing Season Update**

Filing Season Planning
• Anticipated taxpayers’ questions
• Developed mitigation strategies for contact centers

**Slide 10: Filing Season Update**

Successful Filing Season
• 19 million website visits
• Promote self-service options
• Increased electronic payments by 5% over last year

**Slide 11: Filing Season Update**

Successful Filing Season (continued)
• 13.7 million refunds issued with an average $1,100
• CalEITC 3.7 million claims
• $713 million credit
• 20.2 million e-file and paper returns processed
• 10 million payments processed

**Slide 12: Filing Season Update**

FTB Resumes Noticing
• Staff available to answer calls
• Financial hardship/unable to pay:
  o Delay, modify, or release levies/garnishments
  o Establish Installment Agreement plans
  o Allow to skip Installment Agreement payments

**Slide 13: Filing Season Update**

FTB Resumes Noticing
• Financial hardship/unable to pay (continued):
  o Delay collection on accounts
  o Abate penalties
  o Provide relief for taxpayers experiencing a financial hardship
    o Allow for extensions to respond to audit requests
• Current year tax return filing/payment delay

Slide 14: Filing Season Update
Contact Center Level of Access (LOA)
• Contact centers answered 800,000 calls
  o 66% access rate
  o 6:26 minutes average wait time
  o 81% LOA week of July 15

Slide 15: Filing Season Update
Customer Service Continues as Top Priority
• Reopened public counter offices for appointments
• 3,500 customers served
• Automated online appointment system

Slide 16: Filing Season Update
Questions?

Slide 17: Filing Season Update
Public Comment