

COVID Update PowerPoint

Franchise Tax Board Meeting

Thursday, June 4, 2020

Slide 1: COVID Update

Presenter(s) Name(s): Rick Biagi, Accounts Receivable Management Division
Craig Scott, Legal Division, and Paul Ogden, Administrative Services Division
June 4, 2020

Slide 2: COVID Update

California Tax Relief - Who is impacted?

- Individuals
- Business Entities
- Due dates that occurred during the postponement period
 - To file a tax return
 - Or make a tax return or estimate payment

Slide 3: COVID Update

System Changes

- Extended due dates to July 15, 2020
 - Calendar/Fiscal Year tax returns
 - Tax return and estimate payments
- Programmed systems to not assess penalties and interest
- Scheduled Electronic Fund Transfer (EFT) payments:
 - Canceled the existing scheduled EFT date
 - Scheduled a new EFT date

Slide 4 COVID Update

Delayed Collection Action

- Wage attachments, bank levies, liens, and calls
- Secretary of State suspensions
- Top 500 list
- Hardships, installment agreements, skip payments
- Offsets
- Revivors and student assistance letters

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Audit and Filing Enforcement Activities

- Provided alternate communication methods
- Allowed electronic signature of statute of limitation waivers

- Extended response times to document requests
- Delayed noticing of prior year non-filers

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Claims, Protests, and Appeals

- Issued FTB Notice 2020-02 for additional time to file

If expired during the postponement period...	Then considered timely if filed by...
• Claims for Refund	July 15, 2020
• Protests	July 15, 2020
• Appeals with Office of Tax Appeals	July 15, 2020

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Nonresident and Nonwage Withholding

- Forms and payments due July 15, 2020
- Call center open to respond to taxpayer questions

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FTB Outreach

- Public website FAQs continuously updated
- Filing and payment deadline chart
- Links to free tax preparation sites
- Webinars
- YouTube Video
- Partnership with IRS

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CARES Act Conformity

- Economic Impact Payments
- Emergency increase in Unemployment Compensation
- Distributions from qualified retirement accounts

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Priority Work Moving Forward

- Process tax returns
- Process refunds
- Provide outstanding customer service

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We Adapt to Change

- Find alternatives for remote work

- Create spacing in our facilities
- Provide information and support

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Find Alternatives for Remote Work

- Increase telework opportunities
- Leverage technology
- Allow flexibility

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Create Spacing in our Facilities

- Institute social/physical distancing
- Postpone meetings/events
- Make process adjustments

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Provide Information and Support

- Communicate using various channels
- Deliver Thank You and Inspirational Stories to staff
- Have individual and group check-ins

Slide 15 COVID Update

Questions?