EDR^2 Update PowerPoint
Franchise Tax Board Meeting
Thursday, December 2, 2021

Slide 1: EDR2 Update

Presenters' Names: Jennifer Roussel – Finance and Executive Services Division and Jose Orozco – Technology Services Division
December 2, 2021

Slide 2: Tax Systems Modernization Plan

Three horizontally placed circles appear consecutively showing three stages of Enterprise to Data Revenue (EDR). The first circle shows EDR^1 2007-2015. The second circle shows EDR^2 2016-2025 and there is a red highlighted portion of this circle that shows July 1, 2021 above it. The third circle shows EDR^3 2026-2035.

30-Year Vision

- EDR^1: 2007-2015
- EDR^2: 2016-2025 (July 1, 2021)
- EDR^3: 2026-2035

Slide 3: EDR^2 Functionality Highlights
Four Primary Areas

- Case Management
- Modeling
- Data Visualization
- Self-Services

Slide 4: Early Initiatives
2021

- Audit – New Personal Income Tax (PIT) audit models
- Filing Enforcement (FE) – Improve cases to pursue
- Collections – New assets

2022

- Collections – Replace PIT Payer File

Slide 5: EDR^2 Project Timeline 2022-2026

Case Management, Modeling, Data Visualization, and Self-Services are listed on the slide.

2022

- Modeling – PIT Audit Candidate Selection Pilot

2023

- Case Management – PIT Audit and Legal
- Data Visualization
- Self-Services – PIT Audit

Slide 6: EDR^2 Project Timeline 2022-2026

Case Management, Modeling, Data Visualization, and Self-Services are listed on the slide.

2024

- Case Management – Business Entities (BE) Audit and PIT Collections
- Modeling – BE Audit and PIT Collections
- Data Visualization
- Self-Services – BE Audit and PIT Collections

Slide 7: EDR^2 Project Timeline 2022-2026

Case Management, Modeling, Data Visualization, and Self-Services are listed on the slide.

2025

- Case Management – BE Collection and PIT FE
- Modeling – BE Collections, PIT FE, and Customer Segmentation
- Data Visualization
- Self-Services – BE Collections and PIT FE

Slide 8: EDR^2 Project Timeline 2022-2026

Case Management, Modeling, Data Visualization, and Self-Services are listed on the slide.

2026

- Case Management – BE FE
- Modeling – BE FE
- Data Visualization
- Self-Services – BE FE

Slide 9: Questions?

Slide 10: Public Comment