

# **Filing Season Update PowerPoint**

Franchise Tax Board Meeting

Thursday, June 3, 2021

## **Slide 1: Filing Season Update**

Presenters' Names: Cherrie Hayes – Filing Division

Roman Fuentes – Accounts Receivable Management Division

June 3, 2021

## **Slide 2: Pandemic Operations**

- Public Counters
- Contact Centers
- Training
- Processing Services

## **Slide 3: Filing Date Postponement**

- Postponed state tax filing and payment deadline for individual taxpayers
- Implemented system changes to accept tax returns and payments
- Assisted with Electronic Fund Transfers (EFTs) scheduled 4/15

## **Slide 4: Programs Benefiting California**

- Golden State Stimulus
- Earned Income Tax Credit
- Volunteer Income Tax Assistance

## **Slide 5: Filing Season Planning**

- Technology
- Public Counters
- Operational Change Management

## **Slide 6: Web Highlights**

- Website visits
- Promoted self-service options
- Variance patterns from last filing season

## **Slide 7: Return Processing Highlights**

- e-file and paper returns processed
- Refunds issued
- Payments processed

## **Slide 8: Return Processing Highlights**

- EITC claims
- Golden State Stimulus

### **Slide 9: Contact Center Highlights – Telephone Calls**

- Calls answered
- Access rate
- Average wait time

### **Slide 10: Contact Center Highlights – Chats**

- Chats answered
- Access rate
- Average wait time

### **Slide 11: FTB VITA Highlights**

- Difference with Covid-19 pandemic operations
- 81 FTB volunteers (added 11 new in 2021)
- Filed State and Federal returns

### **Slide 12: Summary: Customer Service is Our Priority!**

- Supporting taxpayers
- Supporting representatives
- Supporting staff
- Supporting California

### **Slide 13: Questions?**

### **Slide 14: Public Comment**