

# Customer Service Update PowerPoint

Franchise Tax Board Meeting

Thursday, March 4, 2021

## Slide 1: Customer Service Update

Presenter(s) Name(s): Wendy Fukushima – Accounts Receivable Management Division and Victoria Ramirez – Administrative Services Division  
March 4, 2021

## Slide 2: Customer Service Update

- Public counter field offices
- Local Assistance Centers
- Tax relief for wildfire survivors

## Slide 3: Public Counter Field Offices

- Closed March 19, 2020
- Reopened June 15, 2020, by appointment only
- Closed December 7, 2020, due to regional Stay-at-Home order
- Reopened February 1, 2021, by appointment only

*A photo of an empty public counter field office is shown on screen.*

## Slide 4: Schedule an Appointment

- Options to call a Field Office or send an email to **FTBFieldOfficeAppointments@ftb.ca.gov** to include:
  - Field Office location
  - Customer name and phone number
  - Reason for appointment

## Slide 5: Appointment Results

- Answered over 11,000 telephone calls
- Responded to over 1,600 emails
- Assisted over 8,800 customers by in-person appointments
- Responded to 180 Live Chats from September 16 to December 4

## Slide 6: Future Online Appointment System

- Allow customers to self-serve
- Ability to schedule appointments through our website

## **Slide 7: California Wildfire Survivors at Local Assistance Centers**

- Santa Cruz
- Monterey
- San Diego
- Siskiyou
- Fresno
- Shasta

*A photo of a Local Assistance Center is shown with people sitting and standing in a large gymnasium with tables and chairs.*

## **Slide 8: Virtual Local Assistance Centers**

- Monterey
- Napa
- San Mateo
- San Diego

## **Slide 9: Disaster Related Materials to Local Assistance Centers**

- Napa
- Sonoma
- San Mateo
- Los Angeles
- Santa Clara
- Trinity
- San Bernardino

## **Slide 10: Special Tax Filing Relief Due to Wildfires**

### **August Wildfires**

December 15, 2020

- Butte
- Del Norte
- Lake
- Lassen
- Mariposa
- Monterey
- Nevada
- San Mateo
- Santa Clara
- Santa Cruz

- Solano
- Stanislaus
- Trinity
- Tulare
- Yolo

## **September Wildfires**

January 15, 2021

- Fresno
- Los Angeles
- Madera
- Mendocino
- Napa
- San Bernardino
- San Diego
- Shasta
- Siskiyou
- Sonoma

## **Slide 11: Governor and Presidentially Declared Disaster Areas**

- Governor Newsom's Executive Order issued on September 25
- California State of Emergency declared on September 25 and September 28
- President approved Disaster Declaration on August 22 and October 16

## **Slide 12: Tax Relief Applied to Various Tax Filing Deadlines**

### **Individuals**

October 15, 2020 extended due date

### **Business Entities**

Due date between August 14, 2020 and December 15, 2020

## **Slide 13: California List of Disasters Chart**

<https://www.ftb.ca.gov/file/business/deductions/disaster-codes.html>

*The Franchise Tax Board list of disasters webpage is shown. It displays the following columns: Disaster Code, Incident Period, Disaster, County, Governor Declared, and President Declared.*

## **Slide 14: Survivors May Claim Losses As State Tax Deduction**

- Cover losses not covered by personal property insurance
- Lowers survivors' taxable income

- May result in a refund

### **Slide 15: How to Claim a Disaster Loss**

1. Claim on the 2019 tax return against 2019 income, or
2. Claim on the 2020 tax return, or
3. Amend the 2019 tax return

See FTB Publication 1034, *2019 Disaster Loss: How to Claim a State Tax Deduction*

### **Slide 16: Free Copies of State Tax Returns**

- Complete form FTB 3516, *Request for Copy of Corporation, Exempt Organization, Partnership, or Limited Liability Company Tax Return*
- Write the name of the disaster in blue or black ink at the top of the request

### **Slide 17: Questions?**

### **Slide 18: Public Comment**