Slide 1: Filing Season Update
Presenters' Names: Elaine Abdallah – Filing Division and Susan Marcale – Accounts Receivable Management Division
June 9, 2022

Slide 2: Filing Season Introduction
• Continued social distancing and remote working
• Filing due date remained as planned
• Postponed tax payment due date by 24 hours

Slide 3: Filing Date Highlights
• Discuss improvements to our essential services
• Review planning efforts to achieve a successful filing season
• Present our significant achievements

Slide 4: 2022 Filing Season Top Improvements
• MyFTB account registration made easier
• Pass-through entity elective tax added to Web Pay
• Expanded Customer Service Wait Times Dashboard
• New high speed scanners installed

Slide 5: Filing Season Preplanning Efforts
For Customers
• Created tax forms, instructions, and published them on our public website ftb.ca.gov
• Updated self-service web applications

Slide 6: Filing Season Preplanning Efforts (Continued)
For FTB Operations
• Updated internal systems to efficiently process tax returns and issue refunds
• Coordinated with tax software providers for updates on our e-filing process
• Hired seasonal employees

Slide 7: Filing Season Accomplishments
Website and Self Service Tools
• Website: 13.7 million visits
Web Pay App: 1.5 million visits
Check Your Refund App: 3 million views
MyFTB App: 2 million accesses
Tax forms: 615K visits

Slide 8: Filing Season Accomplishments (Continued)
Return Processing Highlights
• Personal Income Tax returns: 16.3 million filed
  o 95% filed electronically
• Refunds: 10.7 million issued
  o 85% issued by direct deposit
• Tax payments: 6.9 million received
  o 64% electronically

Slide 9: Filing Season Accomplishments (Continued)
Customer Service Highlights
• Phone calls: 274K answered
  o Level of Access: 47%
• Chats: 60K answered
• Average wait time
  o 15 minutes for phones
  o 10 minutes for chat

Slide 10: Filing Season Accomplishments (Continued)
Customer Service Highlights
• During the week of April 11th through April 15th
  o Customer Service Line Level of access: 58%
  o Tax Practitioner Hotline Level of access: 74%

Slide 11: Public Counters
• Assisted 560 customers on filing day
• Served over 40,000 customers this fiscal year
• 94% Approval Rating on Qless from our customers

Slide 12: Public Counters (Continued)
• Customer comments:
  o “Great customer service, we need more people like this in State Government – thank you so much!”
  o “Fast and courteous service – friendly people!”

Slide 13: Programs Benefiting California
FTB Volunteer Income Tax Assistance (VITA) highlights
- VITA Staff
  - Trained over 2,000 volunteers and site coordinators
  - Includes 70 FTB employees
- Volunteers
  - Participated in over 100 in-person, drop-off, and virtual events
  - Prepared 4,000 federal and state tax returns

Slide 14: Programs Benefiting California
- The California Earned Income Tax Credit
  - 3 million returns filed
  - Young Child Tax Credit: 327K qualifying
- CalFile
  - 110K returns were filed

Slide 15: Closing Summary
- Returning to the office
- Culture of collaboration
- “One FTB”
- Continuing to serve the citizens of California

Slide 16: Questions?

Slide 17: Public Comment