

# Filing Season Update PowerPoint

Franchise Tax Board Meeting

Thursday, June 9, 2022

## 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](http://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
  - 95% filed electronically
- Refunds: 10.7 million issued
  - 85% issued by direct deposit
- Tax payments: 6.9 million received
  - 64% electronically

## **Slide 9: Filing Season Accomplishments (Continued)**

### Customer Service Highlights

- Phone calls: 274K answered
  - Level of Access: 47%
- Chats: 60K answered
- Average wait time
  - 15 minutes for phones
  - 10 minutes for chat

## **Slide 10: Filing Season Accomplishments (Continued)**

### Customer Service Highlights

- During the week of April 11th through April 15th
  - Customer Service Line Level of access: 58%
  - 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:
  - “Great customer service, we need more people like this in State Government – thank you so much!”
  - “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**