

Golden State Stimulus Update PowerPoint

Franchise Tax Board Meeting

Tuesday, March 22, 2022

Slide 1: Golden State Stimulus Update

Presenters' Names: Mandy Fithian – Technology Services Division and Roger Lackey – Filing Division

March 22, 2022

Slide 2: Program Components

A Golden State Stimulus California Earned Income Tax Credit poster is shown.

GSS I

- SB 88 and AB 88
- Deliver stimulus payments in the amount of \$600 and \$1,100 to EITC and ITIN recipients

Slide 3: Program Components (continued)

A photo of a man and woman holding a baby's hand at the seashore is shown.

GSS II

- SB 139
- Expand the \$600 to \$1,100 stimulus payments to low to middle income taxpayers, and
- An additional \$500 for GSS I recipients with a dependent

Slide 4: Program Results

A photo of overlapping dollar bills is shown.

GSS I

- First payments delivered on April 16th
- Total payments 4.6M
 - Total value \$2.8B
- ITIN Recipients 641K

Slide 5: Program Results (continued)

A photo of a man and woman holding a baby is shown.

GSS II

- First payments delivered August 27th (electronic payments only)
- Total payments 8.3M

- Total value \$6B
- ITIN recipients 400K
- Combined: the GSS I and GSS II programs delivered
 - 12.9M payments
 - Valued at \$8.8B

Slide 6: Keys to Successful Implementation

A photo of two people shaking hands appears.

- Leverage FTB's best practices
 - Our experts in technology and business processes
 - Communication and service
 - Partnerships and collaboration

Slide 7: Technology and Business Processes

A photo of a man using a high speed electronic scanner appears.

- Leveraged our modernized return processing
 - Confirm eligibility
 - Reduce risk of fraud
 - Traceability of payments
 - Scheduling of payments
 - Strong fiscal controls

Slide 8: Technology and Business Processes (continued)

A photo of a man and woman with two children appears.

- Develop and integrate new processes
 - Creativity and dedication
 - Ability to flex
 - End goal: to serve taxpayers

Slide 9: Communication and Web

A photo of a woman looking down at a letter while seated with a laptop appears.

- Outreach and Media
 - Collaborated with 70 stakeholder groups
 - 300 interviews
- Web Content + GSS Estimator Tool
 - Over 8M visits to our GSS landing page
 - Self Service Estimator used 5M times
 - Published scheduling with detailed scheduling for delivery of checks
 - Our GSS web content was translated in 13 languages by Google translate

Slide 10: Public Service

An illustration of a smiling woman wearing a headset while seated in front of a laptop appears. There are four icons around her, including a telephone, a “like” heart, a “thumbs up” and an envelope with a letter peeking out.

- Public service operations (one on one service)
 - 292K taxpayers served by telephone
 - 81K taxpayers served by chat

Slide 11: Partnership and Collaboration

Four graphic logos appear: The Great Seal of California representing the State Controller’s Office, the State Treasurer’s Office, Fi\$Cal, and Franchise Tax Board appear on screen.

- State Controller’s Office (SCO) partnership
- State Treasurer’s Office (STO) and FI\$CAL
- Financial industry
- Tax software partnership

Slide 12: Our GSS Implementation Partners

A photo showing four fists touching each other with calculators and documents in the background appears.

- State Controller’s Office Team
 - SCO Audits
 - SCO Disbursements
 - Print and Mailing Operations
 - General Disbursements and Key Entry
 - IT Services (data file and EFT processing)
 - SCO Administration
- STO and FI\$CAL - Cash Management

Slide 13: Questions?

Slide 14: Public Comment