

2024 Filing Season Update PowerPoint

Franchise Tax Board Meeting
Monday, June 24, 2024

Slide 1: 2024 Filing Season Update

Presenters' Names: Armon McConnell – Filing Division and Valorie Reynon – Accounts Receivable Management Division
June 24, 2024

Slide 2: Filing Season Focus

- Filing due date remained as planned
- Planning efforts to achieve a successful filing season
- Highlights of our achievements

Slide 3: Filing Season Accomplishments

Website and Self-Service Tools

- Website: 16 million visits
- Web Pay: 2 million visits
- Check Your Refund Status: 3 million requests
- MyFTB: 2 million visits

Slide 4: Filing Season Accomplishments

Return Processing Highlights

- Personal Income Tax returns: 16 million filed
 - 97% filed electronically
- Refunds: 11 million issued
 - 86% issued by direct deposit
- Tax payments: 5 million received
 - 72% received electronically

Slide 5: Filing Season Accomplishments

Customer Service Highlights

- Phone calls: 260,000 answered
 - Level of Access: 50%
- Chats: 72,000 answered
- Average wait times
 - Phones: 16 minutes
 - Chat: 6 minutes

Slide 6: Filing Season Accomplishments

Customer Comments

- “I always get nervous about tax prep and management for my tiny company. But every interaction with FTB over the years has been helpful and calm and professional and informative. The online access and chat make it so much easier. Thank you.”
- “I didn't even know that I could ask the California Franchise Tax Board questions and was glad to see the "Chat" link. Thanks for saving me the potential cost of having to ask or hire an accountant just for a few simple questions. Thanks again!”
- “Thank you for being open the Saturday before Tax Day! It was great to get service when I needed it.”

Slide 7: Public Counters

- Served over 17,000 customers this filing season
- Accomplished 94% approval rating from our customers
- Customers rated scheduling experience 4.5 out of 5-stars

Slide 8: Public Counters

Customer Comments

- “At my appointment, the staff were super friendly and helpful. It couldn't have been a better experience.”
- “Employees are very knowledgeable and professional and made things so easy for me to understand. I really appreciate it. Thanks a lot!”
- “Excellent customer service.”

Slide 9: Supporting Taxpayers Impacted by Disasters

Local Assistance Centers (LAC) and Disaster Recovery Centers (DRC)

- Number of FTB staff who worked at the centers: 8
- Number of centers/locations: 7
 - Local Assistance Centers: 5
 - Disaster Recovery Centers: 2
- Number of taxpayers assisted: 668

Slide 10: Programs Benefiting California

Volunteer Income Tax Assistance (VITA)

- 1,900 trained volunteers and site coordinators
- 91 certified FTB staff
- 27 new staff trained
- 48 in-person events

- 4,400 prepared Federal and State returns

Slide 11: Programs Benefiting California (Continued)

- California Earned Income Tax Credit (CalEITC)
 - 2.9 million returns filed
 - 342,000 Young Child Tax Credit (YCTC) qualifying returns filed
 - 4,500 Foster Youth Tax Credit (FYTC) qualifying returns filed
 - \$1.1 billion dollars allowed
- CalFile
 - 90,000 returns filed

Slide 12: Closing Summary

- Collaboration for One FTB
- Continuing to serve the citizens of California

Slide 13: Questions?

Slide 14: Public Comment