

CalEITC Filing Initiatives PowerPoint

Franchise Tax Board Meeting
Monday, June 24, 2024

Slide 1: CalEITC Filing Initiatives: A Report on the Status of the Implementation of Concepts Presented in the FTB's SB 1409 Report to the Legislature to Increase Claims for the California Earned Income Tax Credit

Presenters' Names: Jeanne Harriman – Finance and Executive Services Division
June 24, 2024

Slide 2: CalEITC Filing Initiatives CalEITC Family of Credits

- CalEITC Credits
- Young Child Tax Credits
- Foster Youth Tax Credits

Slide 3: Outreach and Other Efforts Together We Succeed

- Partner with Local Community Based Organizations for Outreach and Critical Services
- Partner with other key stakeholders – Board Members, Legislature, Advocacy Groups
- Mandated Legislative Report
 - “Study to Increase the Number of Claims for the California and Federal EITC”

Slide 4: Study to Increase the Number of Claims for the California and Federal EITC

- Outreach
- Grant Funding
- Simplified Filing

Slide 5: 2023 Outreach – Letter Campaigns

	Non-Filer	Filer	Total
Total Letter Volume	198,261	147,150	345,411

Total Returns Filed	9,903	2,306	12,209
Response Rate	4.99%	1.57%	3.53%
Results			
Total Number of Credits Allowed	9,137	1,476	10,613
Total Amount of Credit Allowed	\$1,663,033	\$360,477	\$2,023,510

Slide 6: Outreach – Partners and Funding

The California Department of Social Services and Franchise Tax Board logos are displayed.

- Partnering with California Department of Social Services
- Employer and Public Assistance Program Administrator Requirements
- Grant Funds

Slide 7: Looking Forward

The Internal Revenue Service, Franchise Tax Board, and CalEITC logos are displayed.

- Simplified Filing

Slide 8: A very big “Thank You!” to our many stakeholders and partners on assisting taxpayers to become aware of and take the necessary steps to claim the CalEITC family of credits.

Slide 9: Questions?

Slide 10: Public Comment