

Updates on Direct File and VITA PowerPoint

Franchise Tax Board Meeting
Monday, March 24, 2025

Slide 1: Updates on Direct File and VITA

Presenters' Names: Patricia Carte – Filing Division, Johanna Hanson – Filing Division
March 24, 2025

Slide 2: Direct File and CalFile

- Direct File
 - IRS free file tool
 - Launched in 2024
- CalFile
 - California's free file tool
 - Launched in 2003

Alt text: An image showing the CalFile and IRS Direct File logo appears with "FILE FOR FREE!!! FIND OUT MORE AT: www.ftb.ca.gov/calfile appears with "Simple, secure, and always free IRS Direct File directfile.irs.gov"

Slide 3: Direct File and CalFile Connection

Current

- Systems are independent
- Direct File provides the link to CalFile

January 2026

- Data bridge release
- Taxpayer able to leverage federal data in CalFile

January 2027 and beyond

- CalFile refresh

Slide 4: Marketing and Outreach – Website

Alt text: Three images appear from ftb.ca.gov on screen.

An image of a young woman using a laptop with the text "File for free" in bold

A screenshot of Franchise Tax Board's Direct File webpage

A screenshot of Franchise Tax Board's File online webpage

Slide 5: Marketing and Outreach – Social Media Tool Kit

Alt text: Two images appear on screen.

An image appears with “4 ways to save money at tax time” with IRS Direct File, CalFile, California Earned Income Tax Credit and Young Child Tax Credit listed.

An image appears “FILE YOUR TAXES FOR FREE!!!” with “FOR FEDERAL USE” IRS Direct File logo appearing and “FOR STATE USE” CALFILE logo appearing with “FIND OUT MORE AT www.ftb.ca.gov/calfile”

Slide 6: Marketing and Outreach – Posters and Flyers

Alt text: Two images appear on screen.

Two “FILE FOR FREE” IRS Direct File flyers appear showing directfile.irs.gov, with the left side in English, and the right side in Spanish. A woman is shown in the bottom left corner using a laptop near the website www.ftb.ca.gov/calfile and www.ftb.ca.gov/caleitic. A QR code appears above the Franchise Tax Board logo.

Slide 7: Volunteer Income Tax Assistance Program (VITA)

- Overview
- Benefits
- Qualifications

Alt text: A photo of Franchise Tax Board’s VITA team appears above the VITA hands logo.

Slide 8: FTB VITA Program and Role

- Work with IRS and community partners
- Volunteer recruitment
- Provide training and support
- Participate in tax preparation events

Alt text: A photo of a VITA team member assisting a man appears.

Slide 9: Marketing and Outreach

- Community partners
- FTB website and social media
- Employer notification to employees

Alt text: A screenshot from ftb.ca.gov appears of the VITATCE Locator appears with “Get free tax help at a location near you”

Slide 10: Questions?

Slide 11: Public Comment