

# **2025 Filing Season Update PowerPoint**

Franchise Tax Board Meeting  
Wednesday, May 14, 2025

## **Slide 1: 2025 Filing Season Update**

Presenters' Names: Jame Eiserman – Filing Division and Kimjot (Kim) Kohli – Accounts Receivable Management Division  
May 14, 2025

## **Slide 2: Filing Season Focus**

- Filing due dates
- 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: 1.6 million visits
- Check Your Refund Status: 3.1 million views
- MyFTB: 2 million visits

## **Slide 4: Filing Season Accomplishments**

### **Return Processing Highlights**

- Personal Income Tax returns
  - 15.5 million filed
  - 98% filed electronically
- Refunds
  - 14 million issued
  - 88% issued by direct deposit
- Tax payments
  - 4.5 million received
  - 75% received electronically

## **Slide 5: Filing Season Accomplishments**

### **Customer Service Highlights**

- Phone calls
  - 261K answered
  - Level of Access: 47%
- Chats

- 67K answered
  - Level of Access: 67%
- Average wait times
  - Phones: 12.5 minutes
  - Chat: 12 minutes

## **Slide 6: Filing Season Accomplishments**

### **Customer Comments**

- “Namreeta at station 2473 was excellent. She gave me a thorough response without me having to ask additional follow-up questions. She was respectful and professional. I want to say that I appreciate her. Thank you so much.”
- “Live Chat was easy to use. Kayla was very helpful and friendly and made sure to keep me posted on her status. She was able to resolve my issues quickly. I am very satisfied with the experience! Great job!”

## **Slide 7: Public Counters**

- Served 24,052 customers this filing season
- Accomplished 93% approval rating from our customers
- Customers rated scheduling experience 4.5 out of 5 stars

## **Slide 8: Public Counters**

### **Public Counter Customer Service Enhancements**

- Quick guides for common questions
- Improved training strategy for public counter staff

## **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: 28
- Number of taxpayers assisted: 5,984
- Number of LAC and DRC locations: 13
- Disaster assistance phone calls and email answered: 1,168

## **Slide 10: Programs Benefiting California**

### **Volunteer Income Tax Assistance (VITA)**

- 1,479 trained volunteers and site coordinators
- 108 certified FTB staff
- 32 new staff trained
- 17 in-person events
- 4,432 prepared Federal and State returns

## **Slide 11: Programs Benefiting California (Continued)**

- California Earned Income Tax Credit (CalEITC)
  - 2,476,238 million returns filed
  - 319,583 Young Child Tax Credit (YCTC) qualifying returns filed
  - 4,304 Foster Youth Tax Credit (FYTC) qualifying returns filed
  - \$1,073,186,932 billion dollars allowed
- CalFile
  - 87,674 returns filed

## **Slide 12: Closing Summary**

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

## **Slide 13: Questions?**

## **Slide 14: Public Comment**