

Customer Service Enhancements, Education, and Outreach- PowerPoint-Outline

Franchise Tax Board Meeting

Monday, September 8, 2025

Slide 1: Customer Service Enhancements, Education, and Outreach

Presenters' Names: Prachi Vardhe – Audit Division and Elias Dominguez –

Administrative Services Division

September 8, 2025

Slide 2: Background

- FTB's Strategic Plan – Goal 1: Exceptional Service
- Customer/Stakeholder feedback
- Internal performance data and team insights
- EDR²

Slide 3: Customer Service Enhancements

- MyFTB for Taxpayers and Tax Professionals
 - A cleaner, mobile-friendly interface
 - Easier access to notices, balances, and payment history
 - Streamlined tax professional authorization
 - Real-time identity-proofing (RIPE) for instant access
 - Improved document upload and notice tracking
 - Paperless delivery and protest submission features

Slide 4: Customer Service Enhancements (Continued)

- Certificate of Revivor
- Interactive Voice Response (IVR)
- eDemand Payoff Request – PIT

Slide 5: Customer Service Enhancements (Continued)

- Offer in Compromise
- Innocent Joint Filer
- Payment Plans: PIT and BE

Slide 6: Education and Outreach

- Coordinated effort to inform and educate taxpayers
 - “How-to” videos and web content related to:
 - MyFTB

- WebPay
- CalFile
- IRS Direct File
- Estimated payments
- Avoid scams

Slide 7: Education and Outreach (Continued)

- Coordinated effort to inform and educate taxpayers
 - Tax News Articles
 - Continued efforts
 - Field Office lobby videos
 - Social media posts
 - Issuing press releases
 - Sending targeted emails
 - FTB website updates

Slide 8: Education and Outreach (Continued)

- Voluntary Income Tax Assistance (VITA)
- Local Assistance and Disaster Recovery Centers

Slide 9: Education and Outreach (Continued)

- Multilingual outreach for various programs
- FTB partnership with advertising agency
- MyFTB accessed over 2.7M times
 - 23% increase
- FTB website had over 15.8M visits
 - 500K more visits
- The Check Your Refund tool had over 5.2M visits
 - 800K more visits

Slide 10: Looking Ahead

- Continue improving our online systems
- Access to clear, equitable, and effective tax services

Slide 11: Questions?

Slide 12: Public Comment