

EDR² Update PowerPoint

Franchise Tax Board Meeting

Monday, April 6, 2026

Slide 1: EDR² Update

Jose Orozco – EDR² Technical Director, Jennifer Roussel – EDR² Business Director, and Michele Scoggins – EDR² Solution Partner

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Slide 2: Tax Systems Modernization Plan (30-Year Vision)

- EDR¹ 2007-2015
 - Create foundational enterprise systems
 - Modernize return processing and correspondence
- EDR² 2016-2026
 - Move Audit, Legal, Collections and Filing Enforcement workloads onto the enterprise systems created in EDR¹
- EDR³ 2026-2035
 - Replace accounting systems

Slide 3: EDR² Implementation Timeline

2021-2022

- Early Initiatives

2023

- Audit & Protest (PIT)

2024

- Collections (PIT)
- Audit & Protest (PTE & BE)

2025

- Collections (BE)
- Legal
- Filing Enforcement (PIT & BE)

2026

- Warranty Period
- Project Closeout

Implementation includes transition of workloads, new self-services, modeling capabilities, data visualizations, and additional data captured.

Slide 4: EDR² Closing a Chapter Video

A video titled, “EDR² Closing a Chapter” plays.

Slide 5: Key Benefits of EDR²

Retired Aging Technology

- New technology, increased automation, and continued security of data and technical support

Reduced Siloed Work

- Improved efficiency and consistency

Enhanced Data Access

- New data sources and better tools to access data

Improved Case Selection

- Better modeling and compliance results

Improved Customer Experience

- New and enhanced self-service options

Driving Efficiency and Compliance

- More efficient, promote self-compliance, and strengthen ability to collect revenue

Slide 6: Conclusion and Partnership Acknowledgement

We completed the EDR² Project on time, within the approved budget, and within scope!

Thank you to:

- EDR² Solution Partners
- California Department of Technology
- FTB's Board

Slide 7: Questions?

Slide 8: Public Comment