

2026 Filing Season Update PowerPoint

Franchise Tax Board Meeting

Monday, June 22, 2026

Slide 1: 2026 Filing Season Update

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June 22, 2026

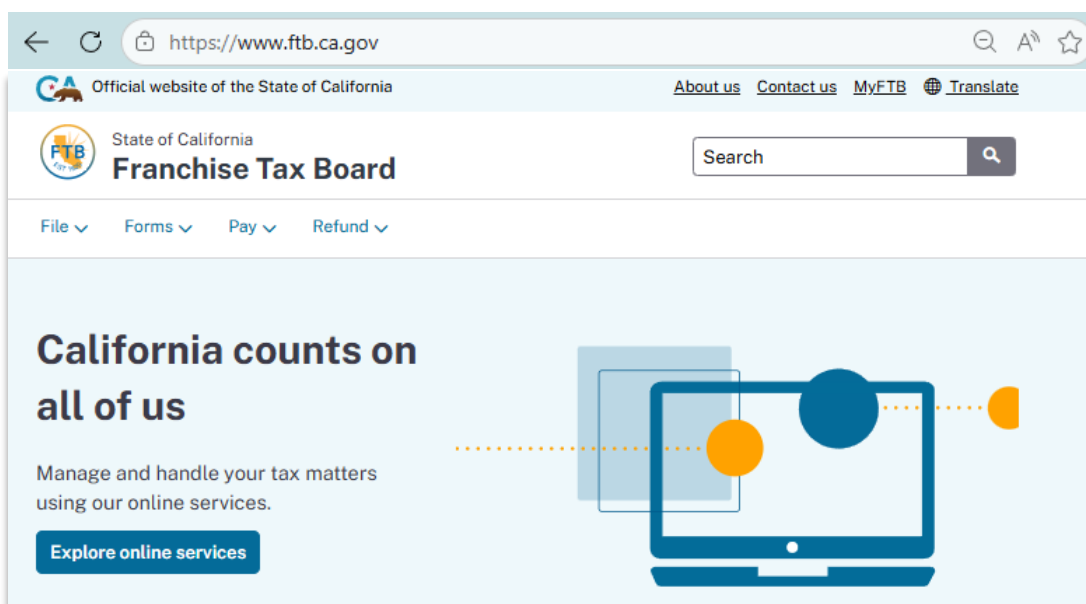
Slide 2: 2026 Filing Season Focus

- Filing due dates
- Planning for a successful filing season
- Expanded customer service offerings

Slide 3: Website and Self-Service Tools

- FTB website **ftb.ca.gov**
 - 20 million visits
- Web Pay
 - 2.3 million visits
- Check Your Refund
 - 6.6 million views
- MyFTB
 - 3.7 million visits

A screenshot of Franchise Tax Board's website ftb.ca.gov homepage is shown.



Slide 4: Return and Payment Filing Highlights

- Personal Income Tax Returns
 - 16.8 million filed
 - 96% filed electronically
- Refunds
 - 12.8 million issued
 - 88% issued by direct deposit
- Personal Income Tax Payments
 - 6.2 million received
 - 75% received electronically

Slide 5: Customer Service Highlights

- Phone Calls
 - 387K answered
 - Level of Access: 42%
- Live Chats
 - 93K answered
 - Level of Access: 60%
- Average Wait Times
 - Phones: 14 minutes
 - Chat: 16 minutes

Slide 6: Customer Service Highlights (Continued)

- Self-service options
 - Smart routing
 - Notice-based response service
 - Offer in compromise
 - Innocent joint filer
 - Applications for tax exempt status

Slide 7: Filing Season Accomplishments

Customer Comments

- “Hi, I just spoke with Timara, Station 1309, and wanted to say she did awesome and was able to answer my questions in a timely fashion. She was very professional and gave me all the information I needed! Thank you.”

- “It was incredibly easy to resolve a notice I received via chat today. I honestly didn't expect it to be that fast and simple to use but am pleasantly surprised it was. Thank you!”

Slide 8: Public Counters

- Served 24,435 customers this filing season
- Accomplished 93% approval rating from our customers
- Customers rated scheduling experience 4.5 out of 5-stars

Slide 9: Local Assistance Centers (LACs) and Disaster Recovery Centers (DRCs)

- Claiming disaster losses
- Acquiring copies of tax returns and forms
- Updating addresses
- Number of FTB staff who worked at the centers: 4
- Number of survivors assisted: 83
- Number of LACs: 2

Slide 10: State Action for Facilitation on Encampments (SAFE)

- Number of SAFE events: 3
- Number of FTB staff who worked at the events: 5
- Number of people assisted: 57

A series of photos from the California Governor's Office shows encampment sites before and after they were removed.



Photo Credit: CA Governor's Office

Slide 11: Programs Benefiting California Volunteer Income Tax Assistance (VITA)

- 1,368 trained volunteers and site coordinators

- 107 certified FTB staff
- 26 new staff trained
- 17 in-person events
- 5,176 Federal and State returns prepared by FTB volunteers

Slide 12: Programs Benefiting California (Continued) CalFile

- Free filing option for California tax returns
 - 65,913 state tax returns filed
- Current marketing
 - Tax booklets
 - Social media
 - Media interviews
 - Flyers

Slide 13: Programs Benefiting California (Continued) Small Businesses

- Education and outreach efforts
- Small Business Liaison
- FTB participated in 22 events
- 15,000 attendees during FY 25-26

Slide 14: Closing Summary

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

Slide 15: Questions?

Slide 16: Public Comment