

Notices and Letters Webpage Optimization PowerPoint

Franchise Tax Board Meeting
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Slide 1: Notices and Letters Webpage Optimization

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Slide 2: Notices/Letters Webpage

- Receives half a million visits annually
- Goal: Create a cleaner, more intuitive experience while reducing clicking, searching, and scrolling

The Franchise Tax Board Notices and letters webpage is shown.

<https://www.ftb.ca.gov/help/letters/index.html>

Slide 3: Notices/Letters Webpage (Continued)

- Developed in 2019 as part of the AB 434 redesign
- Originally featured 40 most common notices, along with brief descriptions and response options

The Franchise Tax Board Notices and letters webpage is shown.

<https://www.ftb.ca.gov/help/letters/index.html>

Slide 4: Current Notices/Letters Webpage

- Expanded during EDR2
- Many notices direct users to new **Respond to notice** application
- Over 1000 notices exist today, but only about 100 are on website

The Franchise Tax Board Notices and letters webpage is shown with a red box drawn around “Electronic upload Respond to notice”.

<https://www.ftb.ca.gov/help/letters/index.html>

Slide 5: Current Notices/Letters Webpage

- CSEA request led to creation of Alpha and Numeric versions of the webpage in 2023
- Short-term, quick fix
- Not efficient to maintain long-term
- Not the most ideal user experience

The Franchise Tax Board Notices and letters webpage is shown with a red box drawn around “Electronic upload Respond to notice”

<https://www.ftb.ca.gov/help/letters/index.html>

Slide 6: User Experience Issues with Current Webpages

- Hard to find the notices
 - Webpage contains a lot of content before getting to the list of notices
 - Requires significant amount of scrolling
- Not all notices are included
 - Adding notices makes the webpages longer, requiring more scrolling

Slide 7: New Webpage Design

- More efficient and user-friendly
- Similar to IRS website
- Sortable and searchable table (by number, title, or keyword)
- List of notices can be viewed in smaller sections

The Internal Revenue Service (IRS) “Understanding your IRS notice or letter” webpage is shown.

<https://www.irs.gov/individuals/understanding-your-irs-notice-or-letter>

Slide 8: Deployment Timeline

- User testing in November
- Finalize design, based on feedback
- Deploy in early 2027 for filing season

Slide 9: Updated Notices and Letters Webpage

Benefits:

- Faster, clearer, and more intuitive
- Easier to find notices
- Fewer clicks and less time spent searching
- Ability to add more notices

A screenshot of the proposed 2027 Personal notices and letters webpage is shown.

Slide 10: Video

A screen recording of the updated Notices and Letters Webpage is shown.

Slide 11: Questions?

Slide 12: Public Comment