

ReadyReturn

**Your California tax return,
ready and waiting for you.**

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Franchise Tax Board

Introduction

ReadyReturn is a free direct-to-government filing option that uses wage and withholding data that we already have in our databases to provide a pre-filled state income tax return to taxpayers who file simple returns. Taxpayers may accept the return as completed, make any needed changes, and e-file directly to us, or choose to use another filing method entirely.

The information on the ReadyReturn comes from:

- The name and address information from our account records.
- The filing status, exemptions, and number of dependents from the taxpayer's previous year California individual income tax return.
- The current tax year wage and withholding information that employers report to the Employment Development Department (EDD); which EDD already provides to the Franchise Tax Board (FTB) to assist in processing tax returns.

FTB deployed the ReadyReturn program as a pilot for tax years 2004 and 2005. Following the completion of the pilot, the three-member Franchise Tax Board directed staff to offer the program to all eligible taxpayers, beginning with tax year 2007.

ReadyReturn has grown in popularity by nearly 450 percent since its first fully implemented filing season. In 2008, 11,253 ReadyReturns were filed, and in 2009, 61,753 ReadyReturns were filed.

In 2010, about 2 million taxpayers qualify for ReadyReturn. The service is available from January 4, 2010, through October 15, 2010. We will update ReadyReturn with final 2009 wage information from January 20, 2010, through October 14, 2010.

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Benefits

Taxpayer benefits:

- It's free – We do not charge for this service.
- It's easy – The taxpayer's information is already there. All the taxpayer needs to do is verify the information, update information that may have changed, add missing information, and e-file the return.
- It's convenient – ReadyReturn is available 24 hours a day, seven days a week.
- It's safe – We use the latest technologies and practices to keep taxpayer information secure and to protect them from identity theft.
- It's fast – When a taxpayer uses ReadyReturn online and chooses to get their refund by direct deposit, they will generally have their money within one week. Taxpayers can check the status of their refund [online](#).

State benefits:

- ReadyReturn speeds up return processing because the initial information already matches our records.
- ReadyReturn saves the state money by reducing the number of return correction notices we need to mail.

For more information, go to ftb.ca.gov and search **ReadyReturn**.

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FAQs

Who is eligible?

About 2 million taxpayers are eligible in 2010. Taxpayers may qualify for ReadyReturn if they filed a 2008 California resident return with:

- Single or head of household filing status.
- Income only from wages.
- No more than five dependents.
- No credits other than the renter's credit.
- Standard deduction.

In 2009, eligible taxpayers must have had only one employer and earned less than \$160,739 if single, or \$241,113 if head of household. Taxpayers who can claim the blind or senior exemption, or can be claimed as a dependent on another person's tax return, qualify for ReadyReturn.

How does a taxpayer find out if they are eligible?

We offer two ways for taxpayers to find out if they qualify:

- **Online** – Go to ftb.ca.gov/ReadyReturn and enter their last name and social security number. Taxpayers can sign up to receive an email once their ReadyReturn is available.
- **By phone** – Call 800.338.0505. Select Personal Income Tax, and then select ReadyReturn. Taxpayers enter their social security number and mailing address.

Does a taxpayer have to use ReadyReturn if they qualify?

No. ReadyReturn is a voluntary program. Taxpayers can choose to use ReadyReturn or the filing method of their choice.

How much do taxpayers pay to use ReadyReturn?

Nothing. ReadyReturn is free e-file for all taxpayers who qualify to use it.

What software is required to use ReadyReturn?

- Adobe Reader (version 7.0 or higher) to view and print the return. Taxpayers can download the latest version of Adobe Reader for free from [Adobe](http://adobe.com).
- A [compatible browser and operating system](#).

[More FAQs](#)

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FAQs (continued)

What should a taxpayer do if their ReadyReturn is not correct?

Because ReadyReturns are based on information from the taxpayer's previous tax return, some information may have changed. ReadyReturn guides the taxpayer through changing their address, reporting additional income, itemizing their deductions, and claiming tax credits they qualify for.

Why are some ReadyReturns not ready?

We begin updating our records on January 20, 2010. After that, we update our wage information every day. However, when we receive taxpayers' individual information depends on when their employer provides it to the EDD.

Employers are required to provide taxpayers with their Form W-2 by January 31. Employers often provide this information to EDD around the same time they mail it to taxpayers. We generally receive about 50% of all taxpayer wage information by mid-February, with 90% of the information received by mid-March. Taxpayers can provide an email address where we can reach them once their ReadyReturn is available. We will send a letter to taxpayers who do not provide an email address.

When can a taxpayer expect their refund with ReadyReturn?

Taxpayers can expect their refund in less than one week when they e-file their ReadyReturn and choose direct deposit. They can expect to wait up to six weeks if they request their refund by check.

If taxpayers owe money, can they use ReadyReturn?

Yes. Taxpayers who use ReadyReturn and owe money, can choose to pay by check, credit card, or send the payment electronically with their return. They can e-file their return now, and schedule their electronic payment for a later date. The taxpayer can also visit our website and use [Web Pay](#) to make a payment after they use ReadyReturn to e-file their return.

[More FAQs on our website](#)

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Statistics and Feedback

Statistics for Tax Year 2008:

- 1.9 million taxpayers were initially eligible.
- 821,000 returns were “readied” (meaning they hadn’t already filed and had not been excluded for any reason when we received their 4th quarter data).
- More than 61,000 ReadyReturns filed (**450% growth** from previous year).
- Projections: 90,000 for tax year 2009; 120,000 for tax year 2010.
- CalFile* and ReadyReturn are the **fastest growing products** for do-it-yourself e-file. Together they made up 12% of all do-it-yourself e-file returns through July 2009.

ReadyReturn user feedback for Tax Year 2008:

- **99%** stated they were satisfied with ReadyReturn.
- **97%** stated this is the type of service government should provide.
- **97%** stated it was more convenient than how they filed in the past.
- **96%** stated it saved them time.
- **99%** stated they would use it again.

Program Costs

- Annual Maintenance: \$125,000.
- Average Cost to Process a ReadyReturn: **\$0.34**.
- Average Cost to Process a Paper Return: **\$2.59**.
- ReadyReturn is expected to produce a net savings in 09/10:

| | |
|---|------------------|
| Cost to Process if Filed on Paper (90,000 x \$2.59) | \$233,100 |
| Cost to Process ReadyReturns (90,000 x \$0.34) | \$30,600 |
| Estimated Cost Savings/Avoidance | \$202,500 |
| Projected 09/10 ReadyReturn Maintenance Costs | \$125,000 |
| Net Savings to State due to ReadyReturn | \$77,500 |

* CalFile is FTB’s secure, free, direct, online program for taxpayers to complete and e-file their personal income tax returns.

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Testimonials

"This was a pleasant surprise that the California FTB did my taxes for me. I verified the filled in information for my protection, and it was 100% accurate. Thank you so much for making this easy."

"It is a convenient option to the existing methods and made a huge difference in my ability and confidence in accurately filing this year."

"This site was a lot easier [than how I filed last year] and the fact that it was free was a bonus."

"Government doesn't get much praise, but get ready. How simple and straightforward you have made this process! I truly appreciate the ease that your office has made of the taxation process. Thank you and wonderful job; you should be proud."

"This is the first time I used this and it was the best experience in filling my taxes ever!"

"This online return was great, easy, and convenient, much faster and less confusing than all those boxes on the paper form. An efficient idea, taking advantage of modern technology."

"It was amazingly easy! I have put my tax preparation off due to I did not have the money to pay my tax person; this was a big relief for me."

"This is the greatest thing I have ever seen California government do."

"Very pleased to have been able to file state tax return in under 10 minutes. Thank you for making this experience as simple as it can get."

"This was so amazing! I can't tell you how much stress has been lifted off of me! Being a college student, I am glued to the computer and have a super jam-packed schedule. This made it almost effortless. If only other things could be so easy!"

"I'm happy to see that my government is here to help me. And this was a great help. Thank you!"

[More testimonials on our website](#)

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Available to copy and use in your newsletter, publication, or website.

Franchise Tax Board's ReadyReturn Simplifies State Tax Filing

A Free, Pre-Filled California Tax Return May Be Ready and Waiting Online

The Franchise Tax Board (FTB) offers ReadyReturn, a free, direct-to-government filing option that presents taxpayers with a pre-filled tax return online for their final approval and submission. FTB uses information already received from taxpayers' W-2s and previously-filed tax returns.

ReadyReturn simplifies tax filing by guiding the taxpayer through changing their address, reporting additional income, itemizing their deductions, and claiming tax credits they qualify for.

"This tax return was the easiest I have ever had to complete. All I have to do is verify and I am done. I will definitely recommend this to others," said a ReadyReturn survey participant.

About 2 million taxpayers qualify for ReadyReturn in 2010. Taxpayers must have filed a 2008 California resident return with single or head of household filing status, income only from wages, no more than five dependents, no credits other than the renter's credit, and the standard deduction. In 2009, they must have had only one employer. Taxpayers who can claim the blind or senior exemption, or can be claimed as a dependent on another person's tax return, qualify for ReadyReturn.

Taxpayers can check their eligibility online using their name and social security number or by calling 800.338.0505 with their name and address. They can sign up to receive an email once their ReadyReturn is available. Taxpayers will need to enter their FTB-assigned Customer Service Number to have secure access to their ReadyReturn online.

Taxpayers can e-file their return now, receive a refund within a week with direct deposit, or schedule their electronic payment for a later date. They can expect to wait up to six weeks if they request their refund by check.

ReadyReturn has grown in popularity by nearly 450 percent since its first fully implemented filing season. Ninety-nine percent of users reported they are satisfied with ReadyReturn and would use it again to file their taxes.

For more information, go to ftb.ca.gov and search for **ReadyReturn**.



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Action Cards | Stickers | Logos

The “Tell-a-Friend Campaign” is an exciting way to promote ReadyReturn. Just give an action card or sticker to someone you think might be interested in ReadyReturn. Remind them of the benefits!

- Click on the link below to open the ReadyReturn Action Cards (pdf file).
[ReadyReturn Action Cards](#)
- Click on the link below to open the ReadyReturn Stickers (pdf file).
Print on Avery Labels 6871.
[ReadyReturn Stickers](#)
- Click on the links below to open different variations of the ReadyReturn logo.
 - Low Resolution (for web) - jpeg. file
[Color ReadyReturn logo](#)
[Black and White ReadyReturn logo](#)
 - High Resolution - jpeg. file
[Color ReadyReturn logo](#)
[Black and White ReadyReturn logo](#)

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Flyer | Leaflet

Click on the link below to open the ReadyReturn Poster or Leaflet (pdf file).

[ReadyReturn Flyer \(8.5" x 11"\)](#)

[ReadyReturn Leaflet \(4.25" x 5.25"\)](#)

Suggested poster or leaflet placement may include the following:

- In front of your own business.
- Company bulletin boards of friends and family.
- School or daycare offices and lunchrooms.
- Senior recreational facilities and retirement homes.
- Fraternities, sororities, and dormitories (in the community area, and hallways).
- Church bulletin boards.
- Apartment/condominium buildings (in laundry and recreation rooms).
- Community activity and learning centers.
- Grocery stores.
- Car washes.
- Laundromats.
- Hotel and motel lobbies.
- Military cafeterias and recreation centers.
- Counters of public places.
- Meeting convention centers and rooms.
- Libraries.
- Union halls.
- Chambers of Commerce.
- Medical or professional offices.
- Waiting rooms at auto repair and tire shops.
- Liquor and convenience stores.
- Tourist information centers.

Please obtain appropriate permission before posting.

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Letter to Taxpayers

Free Online Services from the Franchise Tax Board

The following letter (FTB 968 MEO) will be mailed to taxpayers who have a ReadyReturn ready and waiting for them. It provides instructions on how to view and e-file the return via our website at ftb.ca.gov.

The letter explains that taxpayers have the option of filing their return as is or changing it. Because the program is voluntary, taxpayers can also choose to ignore our invitation and file another way.

The letter also details other free online services we offer, including Check Your Refund Status, MyFTB Account, and Web Pay.

[Letter to Taxpayers](#)

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Click on the links below to open the ReadyReturn videos
(links to our YouTube page).

[Quotes from Real ReadyReturn Users \(HD\)](#)

[Tax Shortcut \(HD\)](#)

[I Want My ReadyReturn](#)

[Simply ReadyReturn](#)

[California State Controller John Chiang on ReadyReturn](#)

To see other videos, visit our [Franchise Tax Board YouTube](#) page.

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Website

ftb.ca.gov

Toll-Free Automated Phone

800.338.0505

Assistance for Persons with Disabilities

We comply with the Americans with Disabilities Act. Persons with hearing or speech impairments, please call TTY/TDD 800.822.6268.

Public Affairs Office

The Public Affairs Office responds to all media contacts. Members of the media can contact the Public Affairs Office at 916.845.4800 or publicaffairsoffice@ftb.ca.gov.