



State of California
Franchise Tax Board



Enterprise. Data. Revenue!

EDR Project Annual Report

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Technology Services Division
December 8, 2015



Today we'll

- Review schedule, budget, and revenue
- Look back on 2015
- Look forward to 2016

Schedule, Budget, and Revenue





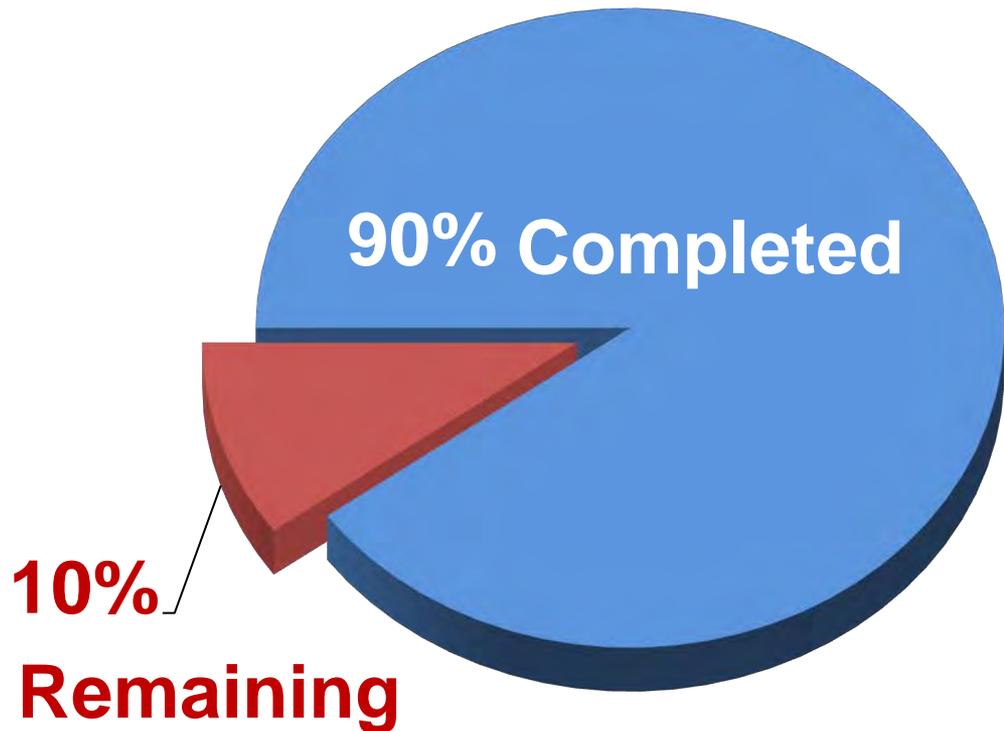
Schedule

2015...

- One final release in December

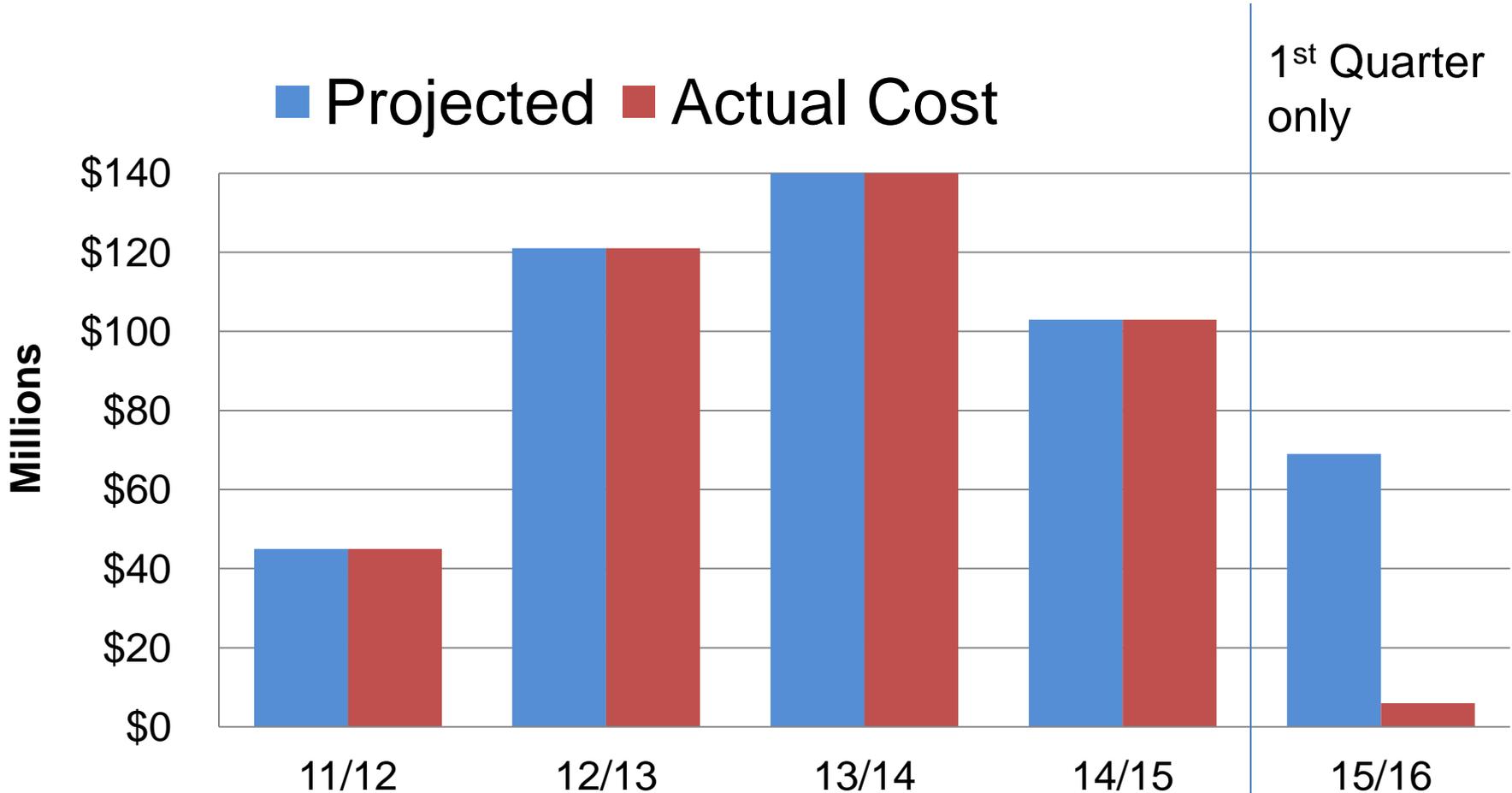
2016...

- Warranty year





Within Budget





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Revenue to Date

\$2 BILLION!

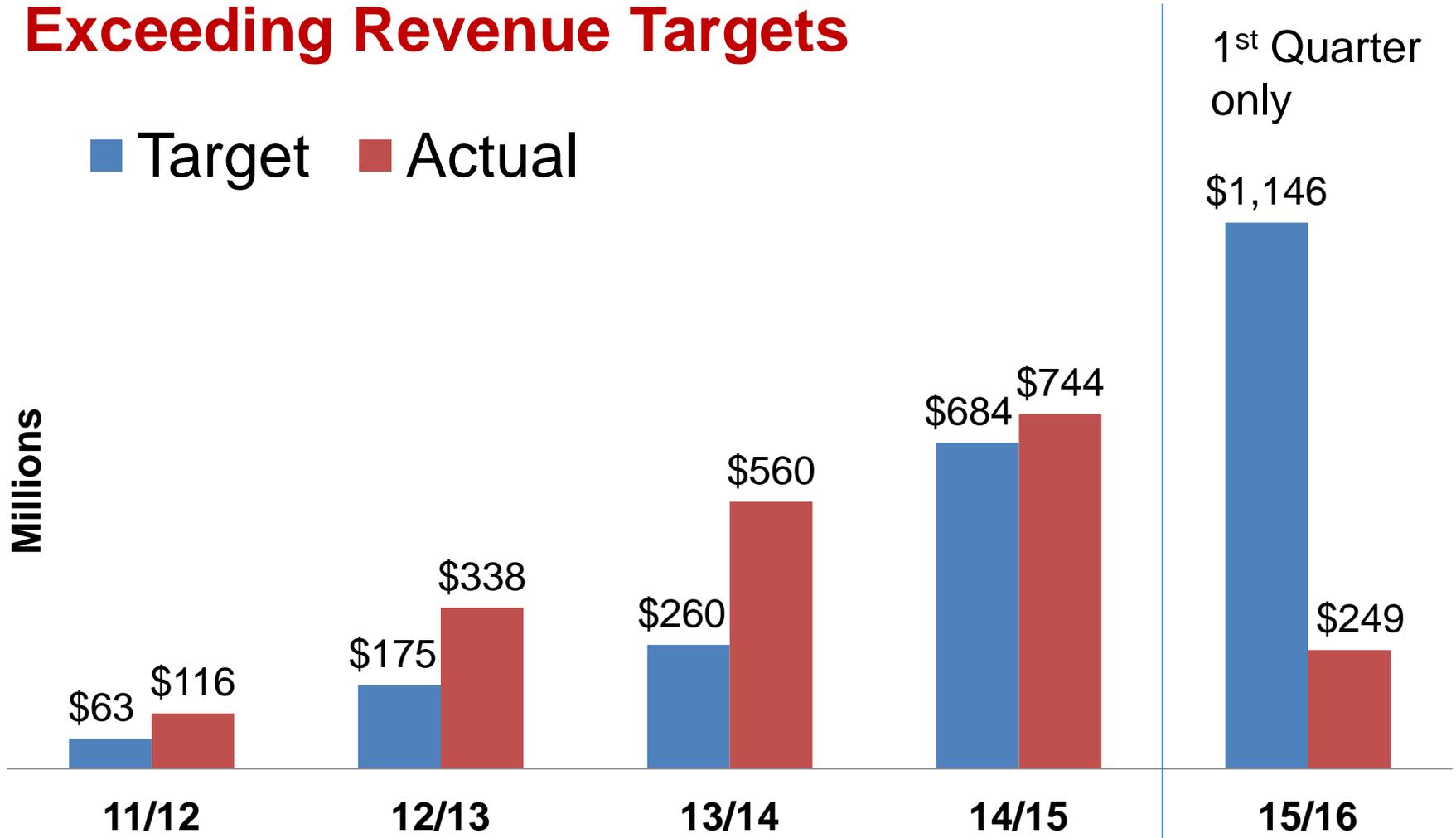




Exceeding Revenue Targets

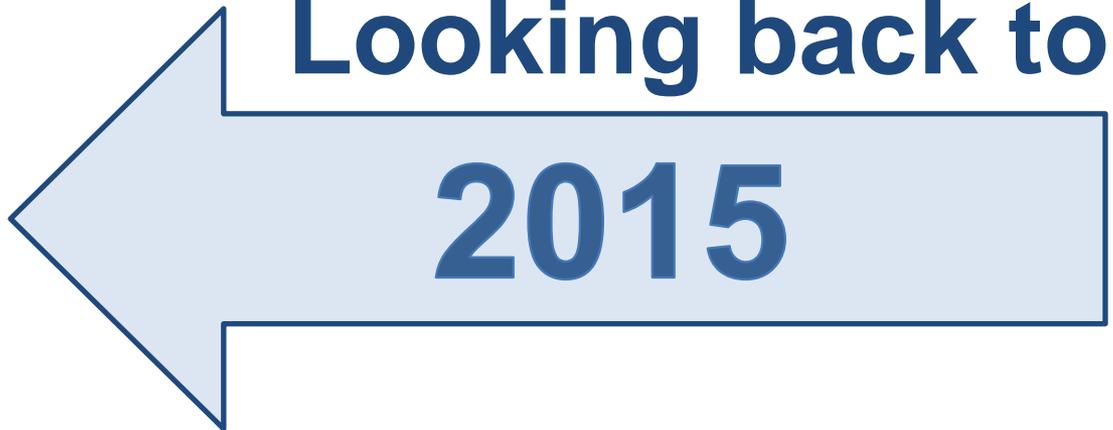
■ Target ■ Actual

Millions





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**Looking back to
2015**



Return Analysis System – PIT

Over 700,000
returns processed
in new system



Improved Address Functions – Best/Locate

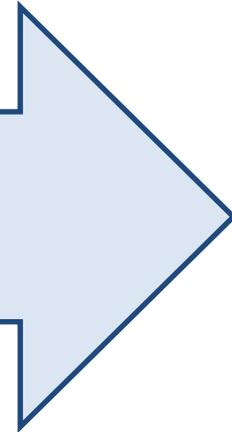
- Best address – ranks addresses and automated re-mail if notice returned by US Postal Service
- Locate address – reaching out to other agencies to obtain a better address
 - DMV, IRS, EDD
 - Lexis Nexis



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Looking forward to

2016





Return Analysis System – PIT Enhancements

- Process 100% of returns in new system
- New: Notice of Tax Return Change
- Earned Income Tax Credit (EITC) rules and fraud identification



Return Analysis System – BE

- Manual processing of returns in real-time
- Improves user experience



More account information
and self-service features at
your fingertips.

Register starting **January 4, 2016**

Power of Attorney



“I have a dream that one day all Powers of Attorney will be able to log on to MyFTB, see their clients’ accounts, and get an email when their client gets a notice from FTB.”

– *Selvi Stanislaus*
FTB Executive Officer

MyFTB – Public Release | MyFTB Team





Knowledge Transfer From Vendor to FTB

- 3 of 10 technology staff need to learn new roles to support EDR without the vendor
- 49% complete
- **Target: December 2018**

TSD – Access to Systems



TSD – Developer



TSD – Tester





Summary

	Project	Employees	Taxpayers
E	Enterprise	Elevated Skills	Environmentally Friendly – Electronic notices via MyFTB
D	Data	Dynamic Workplace	DIY – Do it yourself using MyFTB
R	Revenue	Resourceful to “Make It Happen”	Representative – MyFTB new functions such as POA & Client Lists



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Thank you!

Questions?