



State of California

Franchise Tax Board

Michelle Fallon | Chris Reali

Topics of Discussion

Filing Season Readiness for 2014

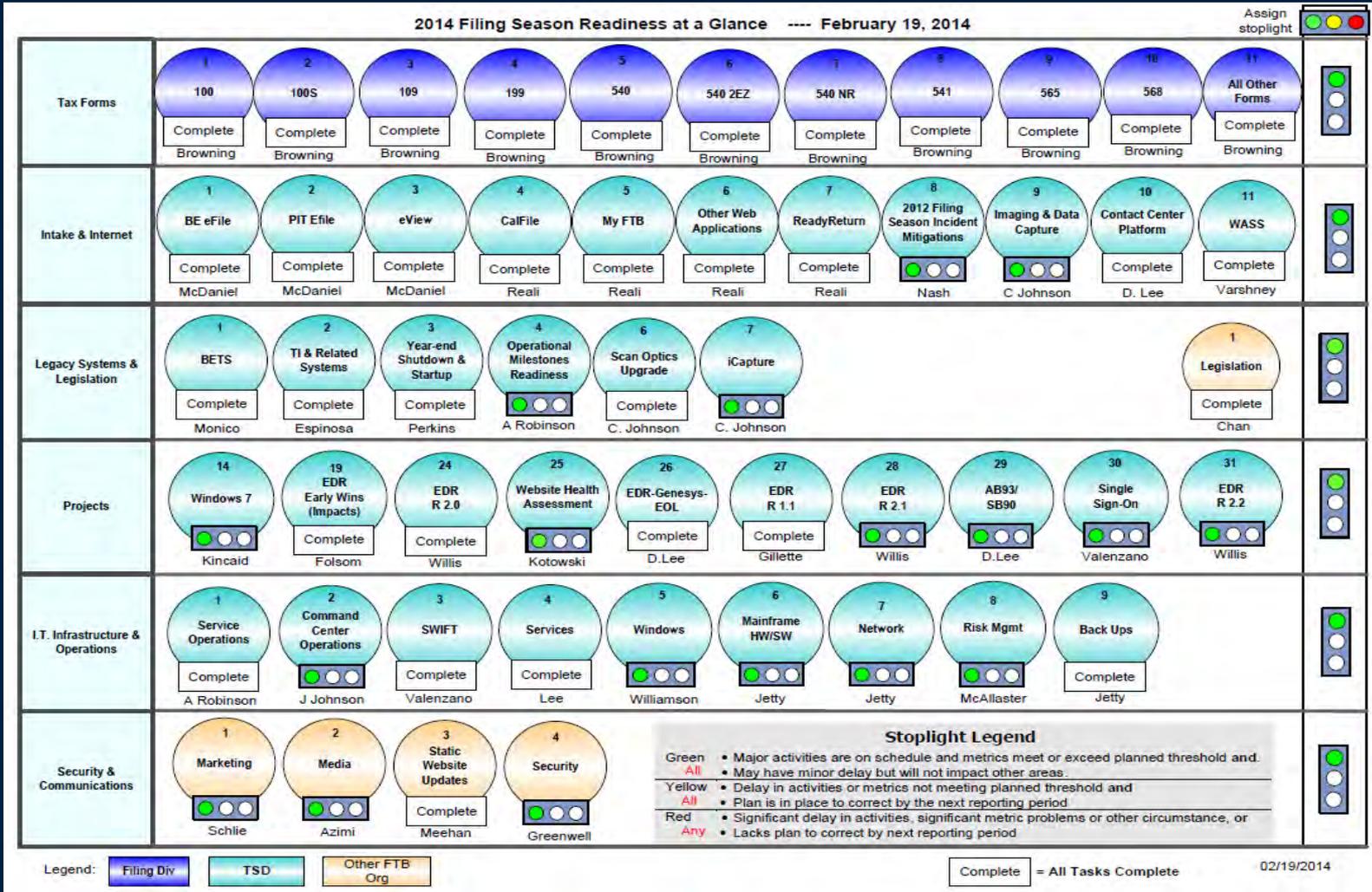
- ❖ *Overview of this year's Readiness*
- ❖ *Bubble Chart*
- ❖ *All Systems Ready!*
- **Coming in 2014**
- **Online Services Outreach**

Filing Season Readiness Review Team

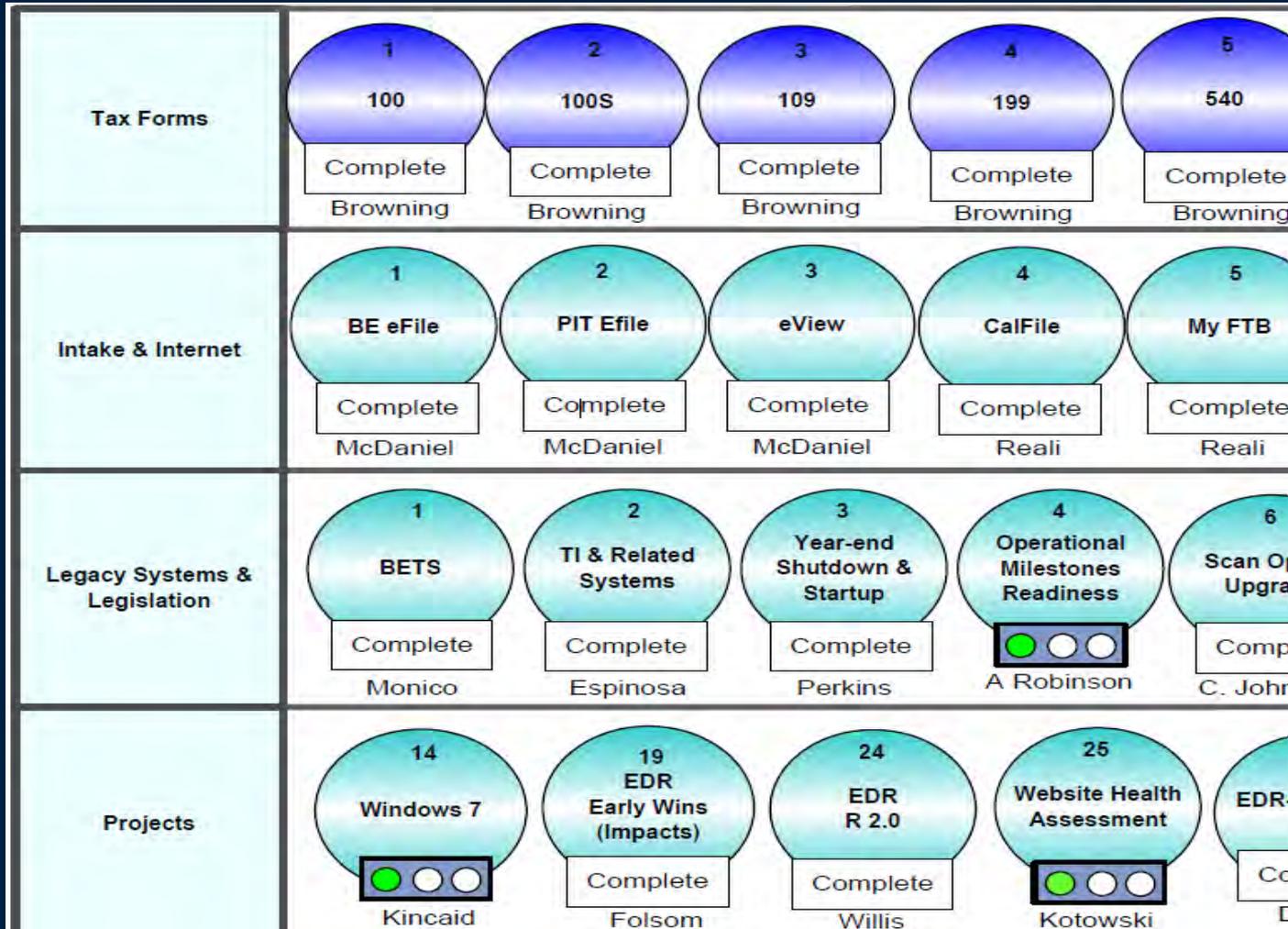
Includes:

- Filing Division,
- Technology Services Division,
- Legislative Services Division, and
- Administrative Services Division.

Filing Season Readiness Bubble Chart



Filing Season Readiness Bubble Chart (cont.)



Web Applications Ready

Ready for Public Use January 2, 2014 (9:45AM):

- CalFile & ReadyReturn
- Check Refund Status
- MyFTB Account (PIT and BE)
- Web Pay (PIT and BE)
- e-Postcard (Form 199N – Exempts)
- New Employment Credit Reservation (new application)
- Contact Center Platform/Interactive Voice Response

Systems Ready

Ready for Processing January 2, 2014:

- e-file – Fastest/Cheapest to Process
 - PIT – Projected 83% of returns in 2014
 - BE – Projected 57% of returns in 2014
 - Fiduciary (new) – Projected 30K in 2014
- Data Capture Systems – Paper Processing
- Enterprise Data to Revenue (EDR)
 - Release 1.1 – Expand Return & Payment Processing
 - Release 2.1 – Expand Internal Taxpayer Folder Information & Case Management Processing
- Accounting Systems

Coming in 2014

Things to look for:

- BE Credit Card Payments (May)
- EDR Release 2.2 (June 30) – Additional Internal Taxpayer Folder Information & Case Management Functionality.
- EDR Release 2.3 (September 30) – Release of External Taxpayer Folder (MyFTB Account) to FTB. Available to the public June 2015.

Online Services Outreach

Scan

...Who doesn't love **FREE?**

...Service, a hassle-free California

CalFile, the California Tax Service

CalFile CalFile is the fast, easy, and free way to e-file your state tax return.

- Build your tax returns with these new features:**
- **Import your W-2 information and avoid data entry.** See what your employer reports to us so you can view, edit, and complete your tax return faster.
 - **Don't worry, you can save and come back.** Need to grab a tax receipt or step away from your computer? Now you can save your information and return to it at your convenience.
 - **Get instant confirmation online or by email.** Instant confirmation assures your tax return has been received and filed successfully.

Complete your tax return in less than 10 minutes. Go to ftb.ca.gov and search for CalFile. It's fast.



- **Eliminate your tax filing hassles.** The information already for you will be available. "Smart" features help you find what you need and give you a receipt. You can receive an email receipt, confirmation, and a tax receipt.
- **The new payment options.** Use Web Pay to file your returns that will be the fastest way. Bank to bank, automatic payments, or we can bill you the amount due now.
- **Getting a refund this year?** If you have a refund, we offer direct deposit. You can check your refund status online.
- **Access your information anytime.** From our website, you can check your filing status, update your filing information, and check your refund status.
- **File online wherever that makes filing and paying your taxes easier.** Go to ftb.ca.gov.



- **Eliminate your tax filing hassles.** The information already for you will be available. "Smart" features help you find what you need and give you a receipt. You can receive an email receipt, confirmation, and a tax receipt.
- **The new payment options.** Use Web Pay to file your returns that will be the fastest way. Bank to bank, automatic payments, or we can bill you the amount due now.
- **Getting a refund this year?** If you have a refund, we offer direct deposit. You can check your refund status online.
- **Access your information anytime.** From our website, you can check your filing status, update your filing information, and check your refund status.
- **File online wherever that makes filing and paying your taxes easier.** Go to ftb.ca.gov.

2013 California 540 2EZ
2013 Personal Income Tax Booklet
Forms and Instructions

Filing Online is Easy.

Free CA e-file at ftb.ca.gov

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Faster refund.
Use our free online filing options for a faster refund.

CalFile ReadyReturn

Online services you can really count on.
We're making California tax filing a lot easier.

- **Review your tax filing options.** Use our new ability to file with CalFile or ReadyReturn. Online file and payment options are also available. You can access all tax forms, instructions, and e-file options.
- **File now. Pay later.** Use Web Pay to schedule tax payments up to one year in advance. You can also have your bank account information for future payments.
- **Getting a refund this year?** For a faster refund, use direct deposit. You can check your refund status online.
- **Access your information anytime.** View your online history, update your filing address, and check wage and withholding information.

ftb.ca.gov

For online services that make filing and paying your taxes easier, go to ftb.ca.gov.

Online Services Outreach

- Tax Booklets
- Posters
- Filing Enforcement Inserts
- Social Media



Online Services Outreach

- Updated CalFile and ReadyReturn Instructional Videos
- New CalFile Marketing Video
- Message to Government Employees
- Employee Paystubs

Questions?

