



State of California  
Franchise Tax Board



## & Filing Season Update

**Cathy Cleek & Anne Miller**  
**CA CPA Society Annual Meeting**

**October 22, 2013**



## What we'll cover today...

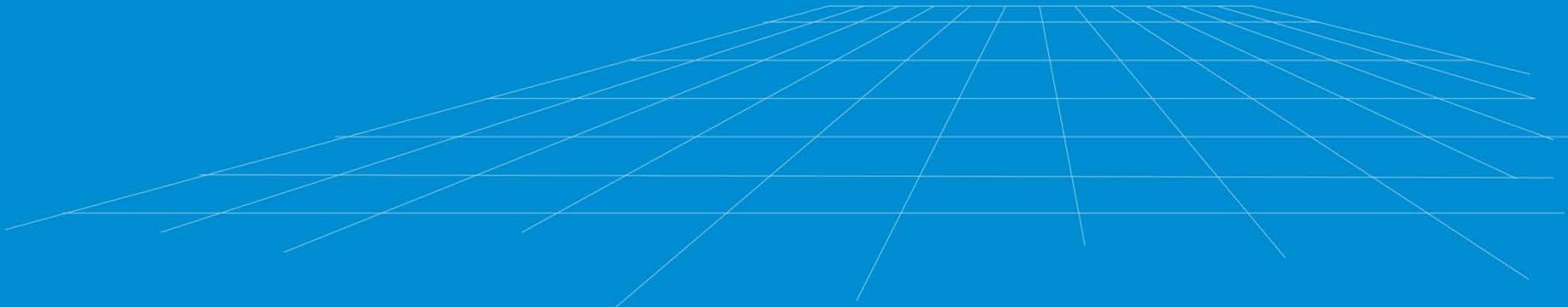
FTB is moving towards a 100% digital workplace.

- We hear you
  - MyFTB Account
  - Imaging Correspondence
  - Data Clean Up
  - Locate Service
  - Power of Attorney
- We need your help too
  - Grow e-programs (e-pay, 541s, e-file)
  - Tax Form changes
  - W2s
- Questions



State of California  
Franchise Tax Board

# We hear you!





## MyFTB Account: Previously Called Taxpayer Folder



The screenshot shows the State of California Franchise Tax Board website. The main navigation bar includes links for Home, Individuals, Businesses, Tax Professionals, and News & Events. A prominent banner features a smiling man at a laptop with the text "Access MyFTB Account" and "Login | Register". Below this, three main service buttons are displayed: "File a RETURN" (with "ONLINE OPTIONS" link), "Make a PAYMENT" (with "PAYMENT OPTIONS" link), and "Check your REFUND" (with "REFUND STATUS" link). The page also features sections for "Popular Topics", "Online Services", and "Top Forms".

**Popular Topics**

- Payment options
- Forms & instructions
- Tax calculator, tables & rates
- Did you receive a notice?
- HQ web response

**Online Services**

- View my account balance & payments
- Web Pay: Individual | Business
- Installment agreements
- Where's my refund?

**Top Forms**

- CA resident (540 & 540A)
- CA resident (540 2EZ)
- CA part-year or nonresident (540NR)
- 2013 estimated tax (540-ES)



# MyFTB Account: Overview

- What is the MyFTB Account?
  - On line access 24/7 to taxpayers' data.
  - Vision: The preferred way of doing business with FTB.
- What are the benefits?
  - Paperless
  - Convenience
  - Transparency
  - Saves \$\$\$



# MyFTB Account: Overview

- Security & Privacy
- When will the new MyFTB Account features be available?
  - Fall 2014
  - New functionality added in January/June



## An early look...subject to change

- Here are early views of the MyFTB Account.

# PIT Taxpayer Overview Page



State of California  
Franchise Tax Board

[Contact Us](#) | [FTB Home](#) | [Log Out](#)

Welcome Scott Metzger, Individual | [Change Role](#)

[Overview](#)

[Account](#)

[Returns](#)

[Activity](#)

[Notices and Correspondence](#)

[My Profile](#)

[MyFTB](#) | **ACCOUNT**

## Taxpayer Overview

[Forms & Publications](#)

[File](#)

[Pay](#)

[Online Services](#)

[Tools](#)

[FAQs](#)



### Alerts

[Lien Filed](#)

### Contact Information

**SSN** \*\*\*\*\*3263  
**FTB ID** 1234567890

414 Main Street  
San Jose, CA 1234  
234.567.8900 (Business)  
234.567.5543 (Mobile)  
scott.smith@aol.com

[Update Contact Information](#)

### Account Status

<b>Current Balance Due</b>	<a href="#">\$999,999.99</a>
<b>2011 Return Status</b>	Accepted
<b>2011 Refund Status</b>	In-Process
<b>Mandatory ePay</b>	<a href="#">Yes</a>
<b>Collections Indicator</b>	<a href="#">Yes</a>
<b>Liens Indicator</b>	<a href="#">Yes</a>
<b>Power of Attorney Representative</b>	<a href="#">Yes</a>
<b>Tax Professional Representative</b>	<a href="#">Yes</a>

[View all account information](#)

### Key Actions & Dates

# PIT Taxpayer Wage and Withholding List

Contact Us | FTB Home | Log Out

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Welcome Scott Metzger, Individual | [Change Role](#)

Overview | Account | Returns | Activity | Notices and Correspondence | My Profile

**MyFTB | ACCOUNT** Wage and Withholding List

- Forms & Publications
- File
- Pay
- Online Services
- Tools
- FAQs

 FTB LiveChat  
CHAT NOW

Select a tax year for detail information.

Tax Year	Total CA State Wages	Total CA State Withholding
<a href="#">2011</a>	\$7,000.00	\$1,300.00
<a href="#">2010</a>	\$100,000.00	\$10,000.00
<a href="#">2009</a>	\$56,000.00	\$5,600.00
<a href="#">2008</a>	\$238,000.21	\$23,980.32
<a href="#">2007</a>	\$34,700.66	\$3,400.54

For the current tax year, fourth quarter wage information may be included. We receive most fourth quarter wage information by the end of March.

If you disagree with this information contact your employer.



MyFTB ACCOUNT Wage and Withholding Detail

- Forms & Publications
- File
- Pay
- Online Services
- Tools
- FAQs

Tax Year: 2011

\* Fourth quarter wage information is not included in this total.

Employer Name	SEIN	CA State Wages	CA State Withholding
HAIR I AM	5000001	\$1,000.00	\$300.00
JOES CRAB SHACK	5000008	\$2,000.00	\$300.00
TARGET	5000009	\$2,000.00	\$600.00
COSTCO	5000066	\$2,000.00	\$100.00

Information for the current tax year is available after January 31st.



# Tax Professional Client List: PIT

Contact Us | FTB Home | Log Out

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Welcome Scott Metzger, Tax Professional | [Change Role](#)

Home | My Profile

**MyFTB | ACCOUNT** Tax Professional

**Primary Contact**

123 MAIN ST.  
FOLSOM, CA 95758

916.555.1212 (Business)  
916.333.3333 (Mobile)

smetzger@work.ca.gov

- Forms & Publications
- File
- Pay
- Online Services
- Tools
- FAQs

 FTB Live Chat  
CHAT NOW

Individual		Business Entity		
Last Name	First Name	SSN	Expiration Date	Office Name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<a href="#">Metzger</a>	Scott	8383	01/01/2013	Some Contact 1
<a href="#">Owens</a>	Royce	0999	02/12/2013	Some Contact 2
<a href="#">Roberts</a>	James	6766	02/12/2013	Some Contact 3
<a href="#">Scott</a>	Royce	7656	02/12/2013	Some Contact 4
<a href="#">Smith</a>	Micheal	7654	02/12/2013	Some Contact 5
<a href="#">Jones</a>	Edgar	555-93-8383	02/12/2013	Some Contact 6
<a href="#">Metzger</a>	Joseph	6666	01/01/2013	Some Contact 7
<a href="#">Smith</a>	Micheal	7656	02/12/2013	Some Contact 8
<a href="#">Williams</a>	Chris	3333	02/12/2013	Some Contact 9
<a href="#">Gerard</a>	Jim	4353	02/12/2013	Some Contact 10
<a href="#">Smith</a>	Scott	1289	02/12/2013	Some Contact 11
<a href="#">Jones</a>	Scott	8883	02/12/2013	Some Contact

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## & Filing Season Update

#	Functionality	Available Today	Available
1	<b>Total Tax Liability</b>	Yes	Fall 14
2	<b>Audit: File Protest online</b>	No	July 15
3	<b>Taxpayer Contact Info</b>	Yes/No	Fall 14
4	<b>Account Status – Balance Due</b>	Yes	Fall 14
5	<b>Returns Filed: Return Image (efile rtns only)</b>	No	Fall 14
6	<b>Audit: NPA</b>	No	July 15
7	<b>Account Status – Mandatory epay Indicator</b>	Yes	Fall 14
8	<b>Audit: Subsequent Correspondence from FTB</b>	No	July 15
9	<b>Amount due/Payments: Balance Due by Tax Year</b>	Yes	Fall 14
10	<b>Amount due/Payments: Estimate payments and credits by taxpayer</b>	Yes	Fall 14



# DATA CLEAN UP UPDATE





# Data Clean Up

- Very powerful tools
- Cleanup work started July 2013
  - Filer Information
  - Nonfiler Information
  - Third Party Information



# **LOCATE SERVICE UPDATE**





# Locate Service

- Significant issue for you and FTB
  - Today our AR has 494k accounts with undeliverable address (July 13)
  - Electronic DMV data exchange
  - FIRM address data (AB 1411)
  - Centralized address database



# IMAGE CORRESPONDENCE UPDATE





# Correspondence

- Started with RINS in July 2014.
- Over next 18 months additional types of correspondence being scanned.
- Viewable
  - Today internally viewable.
  - Viewable in MyFTB Account starting Fall 2014.



# **POWER OF ATTORNEY UPDATE**





# Power of Attorney: Super Box

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### Part 4 – Authorization for All Tax Years or Income Periods for a Limited Duration

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- I authorize the listed representative(s), in addition to anything otherwise authorized on this form, to represent me regarding any matters with the Franchise Tax Board regardless of tax years or income periods. I understand that this authority **will expire four years from the date this POA is signed** or a new POA is filed revoking this authorization.

FTB 3520 c1 (REV 12-2012) PAGE 1



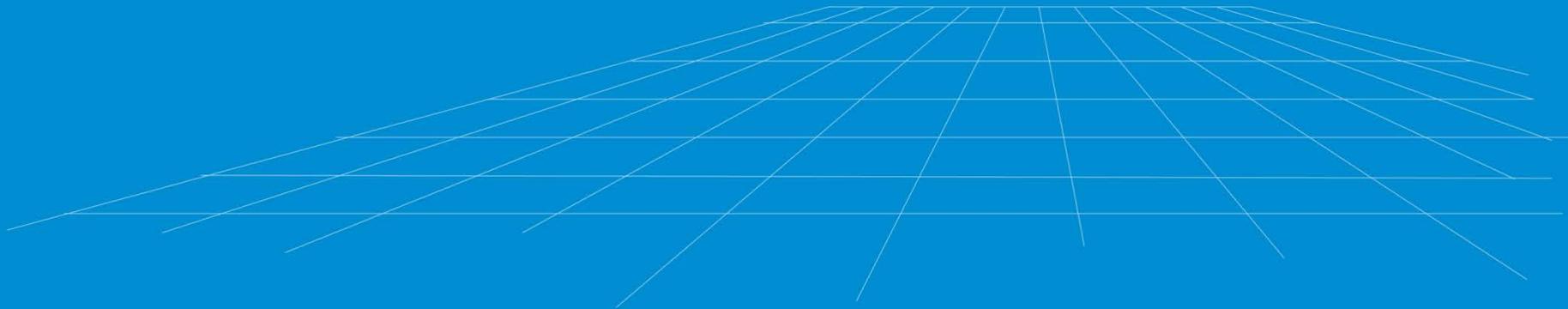
# Power of Attorney: Updates for EDR

- Submit POA through the MyFTB Account.
- Check POA status by account.
- Receive account alerts through the MyFTB Account.
  - Alert for Notices



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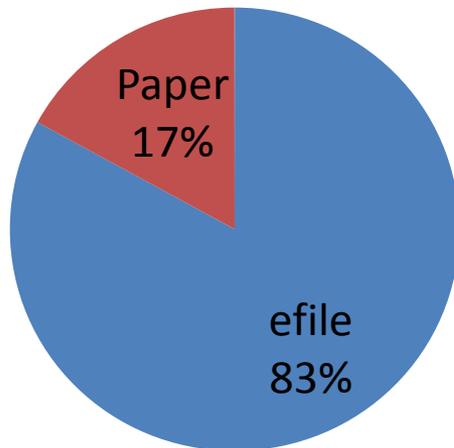
# We need your help!



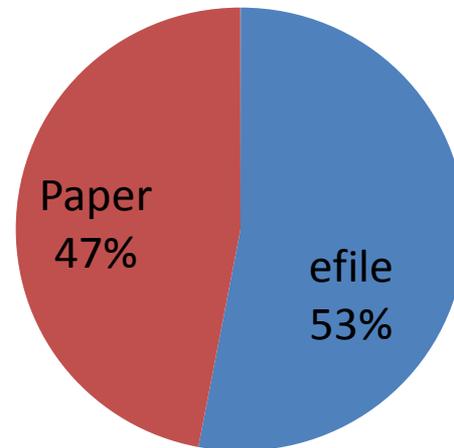
## We need your help!

- Grow e-programs (e-file)

### PIT Filing Method



### BE Filing Method

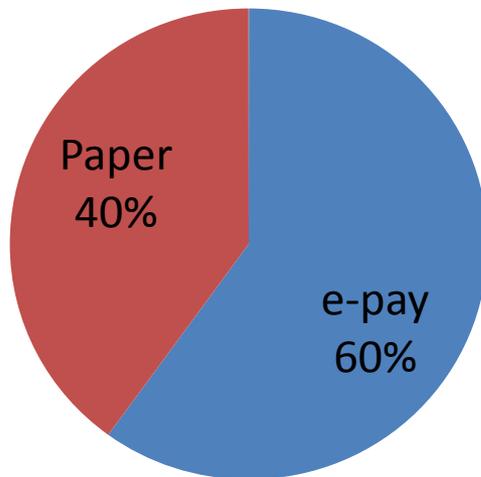




## We need your help!

- Grow e-programs (DDR: Direct Deposit Refund)

### Filers

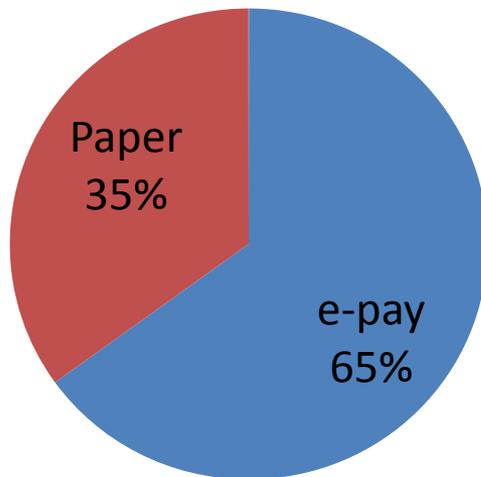




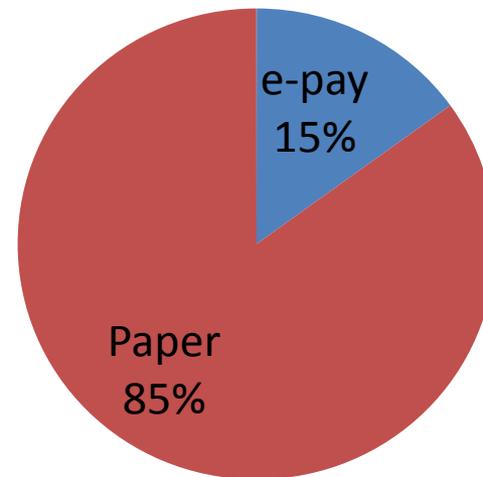
## We need your help!

- Grow e-programs (e-pay)

### DIY Filers



### Filed by Tax Rep





# We need your help!

- Grow e-programs (541s)

e-file of 541s available January 2014!



## We need your help!

- Tax Form changes
- W2s



# Questions?





**Enterprise. Data. Revenue!**

