



State of California
Franchise Tax Board

Secure Email Project



CaICPA Meeting

To implement an email encryption solution that provides a method to securely email confidential *state* tax information and other private or sensitive business information to external recipients.

Customer Service

Secure Email is a fast, convenient, efficient, cost-effective, and **secure** way to communicate confidential information with our customers.

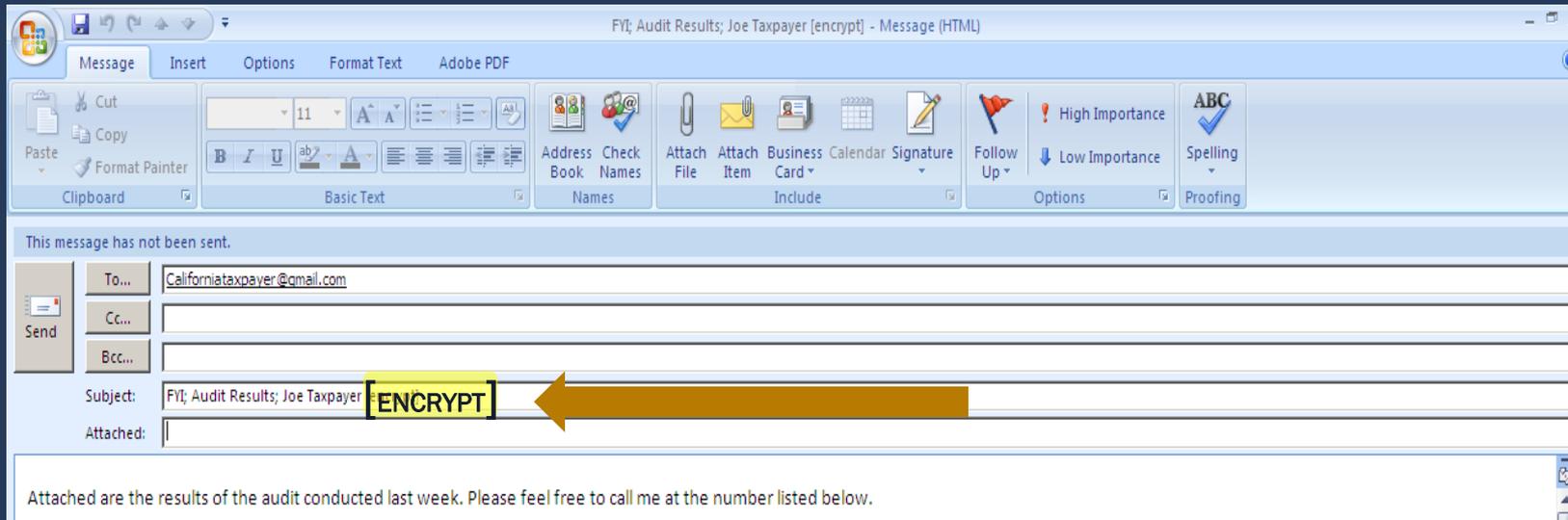
Customer Benefits

- Increased Efficiencies in Processes
- Increased Speed of Communications/ Enhanced Usability
- Reduced Risk of Unauthorized Disclosure
- Improved Customer Service

Customer Comment

“Secure email eliminated countless faxes and phone calls to reconcile my client’s account. Securely sending and receiving confidential state tax information made the entire process smoother.” **Secure Email Customer**

How FTB Employees Encrypt an Email



An FTB Employee simply enters [encrypt] in the subject line to secure the email message.

The customer can reply and the message remains encrypted.

What will the Customer Experience?

After selecting the email in the inbox, the message will appear as follows:

An important confidential email from the Franchise Tax Board.
[Why did I receive a Secure Email?](#)



State of California
Franchise Tax Board

To view your secure email:

- 1. Open the attachment to this email**
- 2. Follow the instructions**

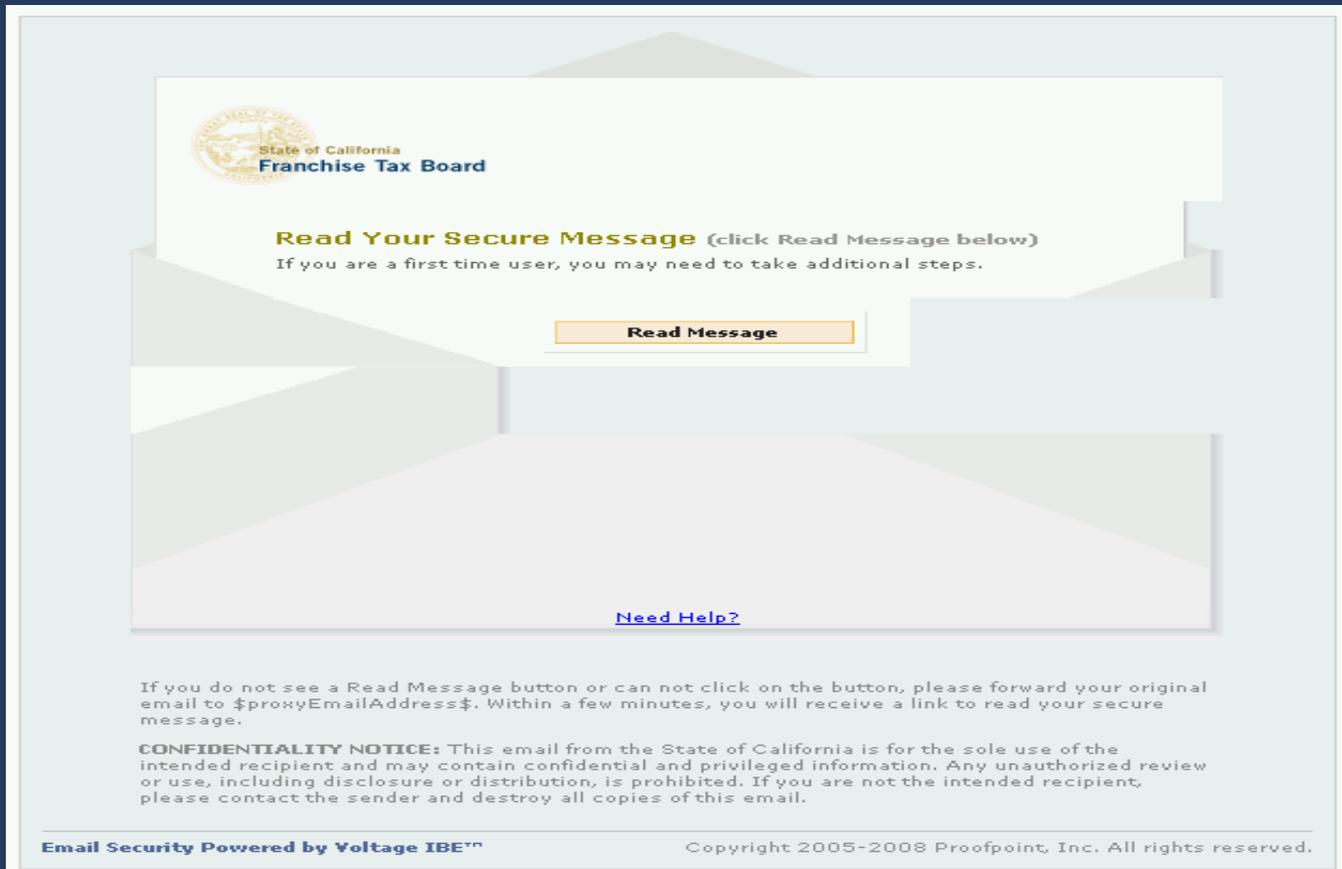
[Need Help?](#)

CONFIDENTIALITY NOTICE: This email from the State of California is for the sole use of the intended recipient and may contain confidential and privileged information. Any unauthorized review or use, including disclosure or distribution is prohibited. Because FTB places high importance on the security of private and confidential information, this email is encrypted. If you are not the intended recipient, please contact the sender and destroy all copies of this email.

Email Security Powered by Voltage IBE™

Customer Experience – Read Message

Once the recipient clicks on the attachment, the envelope opens.



Customer Experience – Creating an ID

First time users will need to register.

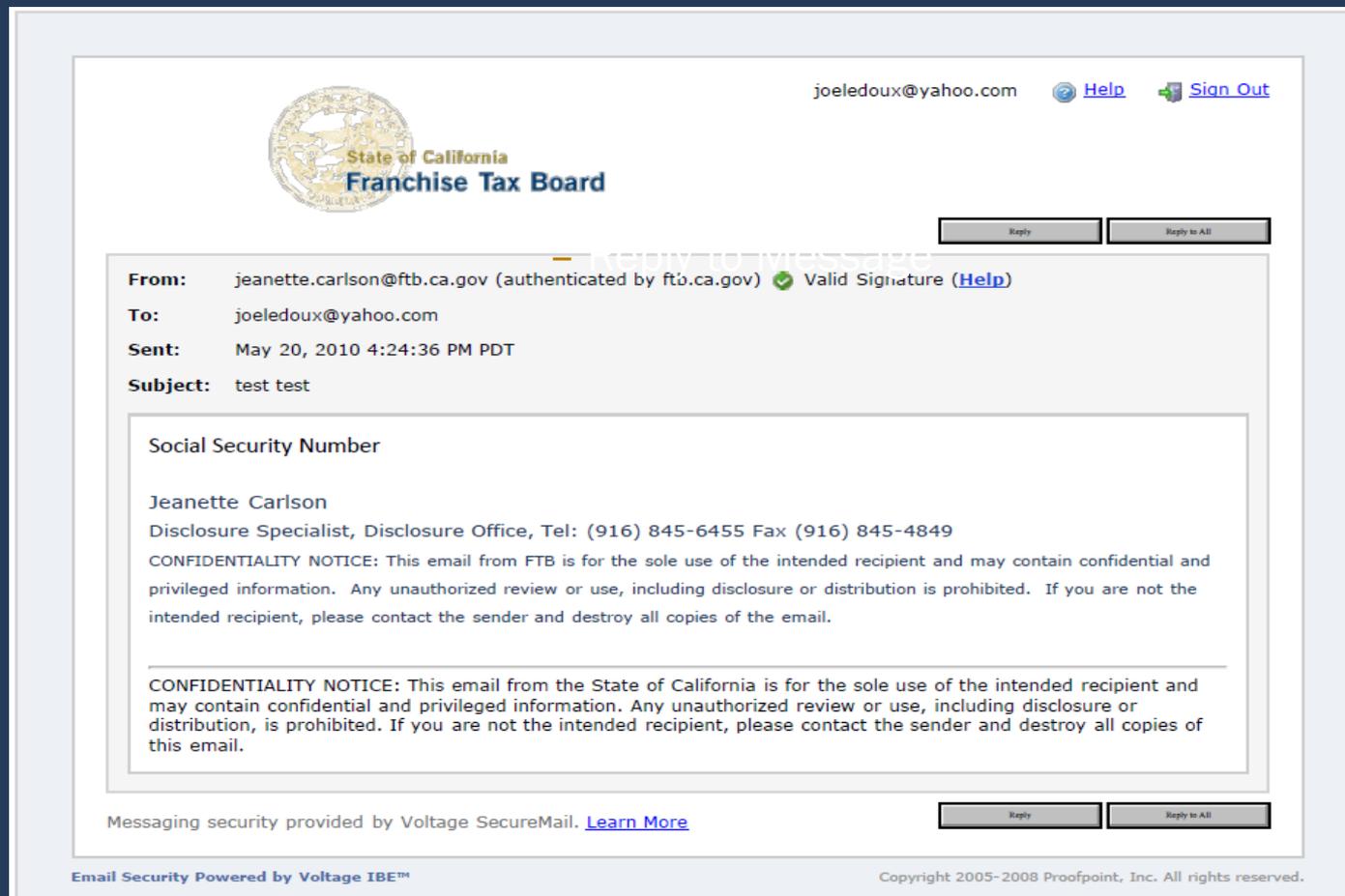


The screenshot shows a web registration form for the State of California Franchise Tax Board. The page title is "State of California Franchise Tax Board" with a logo on the left and a "Help" link on the right. The main heading is "Create Your Proofpoint Secure Messaging ID". The form fields are: "Name:" (empty text box), "Email Address:" (pre-filled with "joe@example.com"), "Password:" (empty text box), "Verify Password:" (empty text box), "Recovery Question:" (dropdown menu with "Please choose one" selected), and "Answer:" (empty text box). A "Continue" button is located at the bottom right of the form. Below the form is a privacy notice: "We value your right to privacy. We will never use your email address to send you unsolicited mail, and we will never share it with or sell it to a third party." At the bottom of the page, there is a footer with "Messaging security provided by Voltage SecureMail. Learn More" and "Email Security Powered by Voltage IBE™" on the left, and "Copyright 2005-2008 Proofpoint, Inc. All rights reserved." on the right.

After the initial registration, customers will be sent an email with a link to open the message.

Customer Experience – Decrypted Email

Once decrypted, the recipient will be able to view their email.



The screenshot shows an email interface with the following elements:

- Header:** The sender's email address is `joeledoux@yahoo.com`. There are links for [Help](#) and [Sign Out](#).
- Sender Information:** The State of California Franchise Tax Board logo is displayed on the left. On the right, there are buttons for [Reply](#) and [Reply to All](#).
- Metadata:**
 - From:** jeanette.carlson@ftb.ca.gov (authenticated by ftb.ca.gov) ✓ Valid Signature ([Help](#))
 - To:** joeledoux@yahoo.com
 - Sent:** May 20, 2010 4:24:36 PM PDT
 - Subject:** test test
- Body Content:**
 - A redacted area containing the text "Social Security Number".
 - A signature block for Jeanette Carlson, Disclosure Specialist, with contact information: Tel: (916) 845-6455 Fax (916) 845-4849.
 - A confidentiality notice: "CONFIDENTIALITY NOTICE: This email from FTB is for the sole use of the intended recipient and may contain confidential and privileged information. Any unauthorized review or use, including disclosure or distribution is prohibited. If you are not the intended recipient, please contact the sender and destroy all copies of the email."
 - A second confidentiality notice: "CONFIDENTIALITY NOTICE: This email from the State of California is for the sole use of the intended recipient and may contain confidential and privileged information. Any unauthorized review or use, including disclosure or distribution, is prohibited. If you are not the intended recipient, please contact the sender and destroy all copies of this email."
- Footer:** A message states "Messaging security provided by Voltage SecureMail. [Learn More](#)". There are additional [Reply](#) and [Reply to All](#) buttons.
- Page-Footer:** "Email Security Powered by Voltage IBE™" and "Copyright 2005-2008 Proofpoint, Inc. All rights reserved."

Customer Experience – Reply to Message

The customer can reply and the message remains encrypted.

The screenshot shows an email client interface. At the top left is the State of California Franchise Tax Board logo. The user's email address, joeledoux@yahoo.com, is displayed at the top right, along with 'Help' and 'Sign Out' links. A large orange arrow points from the center of the screen towards the 'Send Secure' button. The email header shows the sender as joeledoux@yahoo.com (authenticated by ftb.ca.gov), the recipient as jeanette.carlson@ftb.ca.gov, and the subject as 'RE: test test'. The 'Attach' section shows a 'Browse...' button. The email body contains a header with the sender's name and contact information, followed by the text 'Social Security Number' and a confidentiality notice. The bottom of the screen shows a taskbar with the Internet Explorer logo and the text 'Internet | Protected Mode: On'.

State of California
Franchise Tax Board

joeledoux@yahoo.com Help Sign Out

Send Secure

From: joeledoux@yahoo.com (authenticated by ftb.ca.gov)

To: jeanette.carlson@ftb.ca.gov [Remove Me](#)
You will receive a copy of this message ([remove me](#))

Subject: RE: test test [Plain Text](#)

Attach: Browse...

From: jeanette.carlson@ftb.ca.gov
Sent: May 20, 2010 4:24:36 PM PDT
To: joeledoux@yahoo.com
Subject: test test

Social Security Number

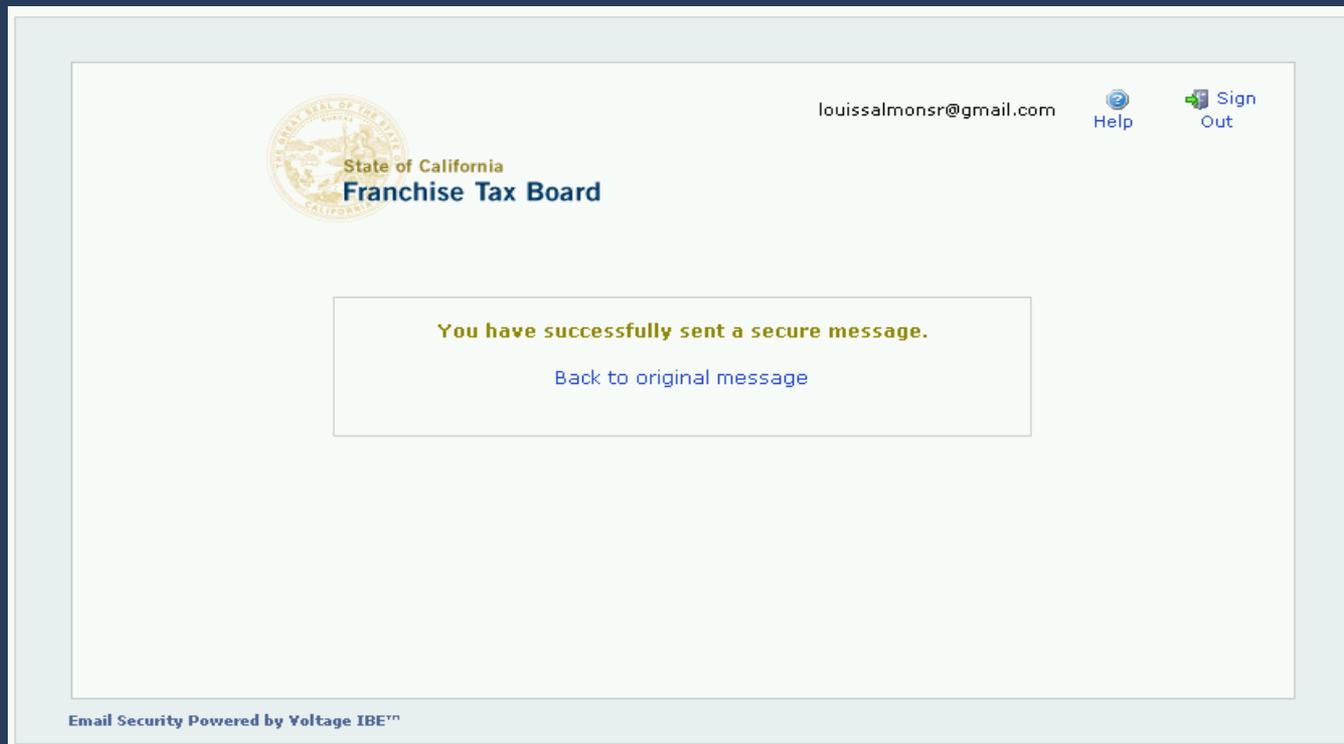
Jeanette Carlson
Disclosure Specialist, Disclosure Office, Tel: (916) 845-6455 Fax (916) 845-4849

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Internet | Protected Mode: On

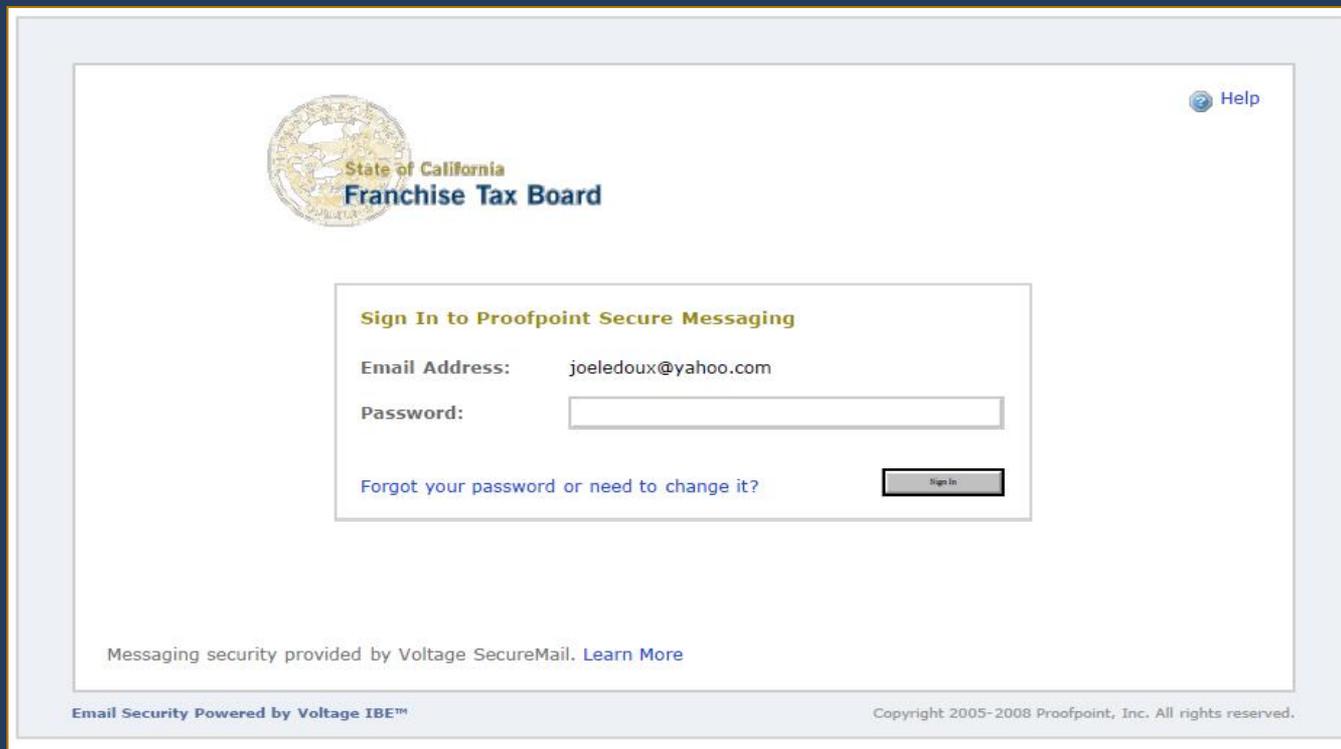
Customer Experience – Success Secure Message Sent

A confirmation window appears assuring you that the email was sent securely.



Customer Experience – Repeat Users

An email and password is all that is required for returning external customers.



The screenshot shows a login interface for the State of California Franchise Tax Board. At the top left is the state seal, and to its right is the text "State of California Franchise Tax Board". In the top right corner is a "Help" link. The main content area is titled "Sign In to Proofpoint Secure Messaging" and contains a form with the following fields: "Email Address:" with the value "joeledoux@yahoo.com" and "Password:" with an empty text box. Below the password field is a link: "Forgot your password or need to change it?". A "Sign In" button is located to the right of the password field. At the bottom of the form area, it says "Messaging security provided by Voltage SecureMail. [Learn More](#)". The footer of the page includes "Email Security Powered by Voltage IBE™" on the left and "Copyright 2005-2008 Proofpoint, Inc. All rights reserved." on the right.

Common Concerns from Users

Can FTB assure taxpayer information will be 100% secure when sending by encrypted email?

How do we know the email is from FTB and not a phishing scam?

I don't feel comfortable with taxpayer information being emailed, even when encrypted. Why is FTB sending confidential information via secure email?