

Filing Season Update PowerPoint

Franchise Tax Board Meeting
Friday, September 18, 2020

Slide 1: Filing Season Update

Presenter(s) Name(s): Yvonne Crankfield – Filing Division and Frank Curcuro – Accounts Receivable Management Division
September 18, 2020

Slide 2: Filing Season Update

COVID-19 Pandemic

- Closed public counter field offices in March
- Limited Volunteer Income Tax Assistance (VITA) locations

Slide 3: Filing Season Update

Impacts to Taxpayers

- Disaster Strike Force Team and Filing Season Action Team
- Extend tax filing and payment deadlines
- Postponement period
- Provide relief for nonresidents

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Postponement Period

- FTB proactively provided relief
- Updated website regarding CalEITC and Young Child Tax Credit
- System changes to accept tax returns and payments
- No penalties or interest during postponement
- Assisted with scheduled Electronic Fund Transfers (EFT)

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Postponement Period (continued)

- Delayed audit and filing enforcement activities
- Temporarily accepted electronic signatures on Statute of Limitation waivers
- Granted extensions to respond to document requests
- Delayed noticing and assessments
- Partnered with IRS

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Delayed Collection Action

- Suspended wage attachments, bank levies, liens, collection phone calls, and field calls
- Delayed suspension of business entities
- Delayed publication of our Top 500 list
- Extended hardships

- Allowed for skip payments for Installment Agreements

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Delayed Collection Action (continued)

- Suspended offsets
- Established alternate methods for Revivors and Individual Status letters
- Published external communication for our customers

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Essential Services

- Public counter field offices reopened June 15
- Customers request field office appointments
- 3,500 field office appointments since June 15

There is a photo of a woman getting services at the public counter.

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Filing Season Planning

- Anticipated taxpayers' questions
- Developed mitigation strategies for contact centers

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Successful Filing Season

- 19 million website visits
- Promote self-service options
- Increased electronic payments by 5% over last year

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Successful Filing Season (continued)

- 13.7 million refunds issued with an average \$1,100
- CalEITC 3.7 million claims
- \$713 million credit
- 20.2 million e-file and paper returns processed
- 10 million payments processed

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FTB Resumes Noticing

- Staff available to answer calls
- Financial hardship/unable to pay:
 - Delay, modify, or release levies/garnishments
 - Establish Installment Agreement plans
 - Allow to skip Installment Agreement payments

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FTB Resumes Noticing

- Financial hardship/unable to pay (continued):
 - Delay collection on accounts
 - Abate penalties
 - Provide relief for taxpayers experiencing a financial hardship
 - Allow for extensions to respond to audit requests
- Current year tax return filing/payment delay

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Contact Center Level of Access (LOA)

- Contact centers answered 800,000 calls
 - 66% access rate
 - 6:26 minutes average wait time
 - 81% LOA week of July 15

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Customer Service Continues as Top Priority

- Reopened public counter offices for appointments
- 3,500 customers served
- Automated online appointment system

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Questions?

Slide 17: Filing Season Update

Public Comment