

Customer Service Update PowerPoint

Franchise Tax Board Meeting

Thursday, March 4, 2021

Slide 1: Customer Service Update

Presenter(s) Name(s): Wendy Fukushima – Accounts Receivable Management Division and Victoria Ramirez – Administrative Services Division
March 4, 2021

Slide 2: Customer Service Update

- Public counter field offices
- Local Assistance Centers
- Tax relief for wildfire survivors

Slide 3: Public Counter Field Offices

- Closed March 19, 2020
- Reopened June 15, 2020, by appointment only
- Closed December 7, 2020, due to regional Stay-at-Home order
- Reopened February 1, 2021, by appointment only

A photo of an empty public counter field office is shown on screen.

Slide 4: Schedule an Appointment

- Options to call a Field Office or send an email to **FTBFieldOfficeAppointments@ftb.ca.gov** to include:
 - Field Office location
 - Customer name and phone number
 - Reason for appointment

Slide 5: Appointment Results

- Answered over 11,000 telephone calls
- Responded to over 1,600 emails
- Assisted over 8,800 customers by in-person appointments
- Responded to 180 Live Chats from September 16 to December 4

Slide 6: Future Online Appointment System

- Allow customers to self-serve
- Ability to schedule appointments through our website

Slide 7: California Wildfire Survivors at Local Assistance Centers

- Santa Cruz
- Monterey
- San Diego
- Siskiyou
- Fresno
- Shasta

A photo of a Local Assistance Center is shown with people sitting and standing in a large gymnasium with tables and chairs.

Slide 8: Virtual Local Assistance Centers

- Monterey
- Napa
- San Mateo
- San Diego

Slide 9: Disaster Related Materials to Local Assistance Centers

- Napa
- Sonoma
- San Mateo
- Los Angeles
- Santa Clara
- Trinity
- San Bernardino

Slide 10: Special Tax Filing Relief Due to Wildfires

August Wildfires

December 15, 2020

- Butte
- Del Norte
- Lake
- Lassen
- Mariposa
- Monterey
- Nevada
- San Mateo
- Santa Clara
- Santa Cruz

- Solano
- Stanislaus
- Trinity
- Tulare
- Yolo

September Wildfires

January 15, 2021

- Fresno
- Los Angeles
- Madera
- Mendocino
- Napa
- San Bernardino
- San Diego
- Shasta
- Siskiyou
- Sonoma

Slide 11: Governor and Presidentially Declared Disaster Areas

- Governor Newsom's Executive Order issued on September 25
- California State of Emergency declared on September 25 and September 28
- President approved Disaster Declaration on August 22 and October 16

Slide 12: Tax Relief Applied to Various Tax Filing Deadlines

Individuals

October 15, 2020 extended due date

Business Entities

Due date between August 14, 2020 and December 15, 2020

Slide 13: California List of Disasters Chart

<https://www.ftb.ca.gov/file/business/deductions/disaster-codes.html>

The Franchise Tax Board list of disasters webpage is shown. It displays the following columns: Disaster Code, Incident Period, Disaster, County, Governor Declared, and President Declared.

Slide 14: Survivors May Claim Losses As State Tax Deduction

- Cover losses not covered by personal property insurance
- Lowers survivors' taxable income

- May result in a refund

Slide 15: How to Claim a Disaster Loss

1. Claim on the 2019 tax return against 2019 income, or
2. Claim on the 2020 tax return, or
3. Amend the 2019 tax return

See FTB Publication 1034, *2019 Disaster Loss: How to Claim a State Tax Deduction*

Slide 16: Free Copies of State Tax Returns

- Complete form FTB 3516, *Request for Copy of Corporation, Exempt Organization, Partnership, or Limited Liability Company Tax Return*
- Write the name of the disaster in blue or black ink at the top of the request

Slide 17: Questions?

Slide 18: Public Comment