

2023 Filing Season Update PowerPoint

Franchise Tax Board Meeting
Wednesday, December 6, 2023

Slide 1: 2023 Filing Season Update

Presenters' Names: Erin Carvel – Filing Division and Angela Flores – Accounts Receivable Management Division
December 6, 2023

Slide 2: Filing Season Focus

- Assisting taxpayers impacted by disasters
- Laying the foundation for EDR2
- Utilizing Virtual Hold for the Tax Practitioner Hotline
- Supporting a hybrid workforce

Slide 3: Filing Season Accomplishments Website and Self-Service Tools

- Website: 28 million visits
- Web Pay: 2.5 million visits
- Check Your Refund Status: 5.4 million requests
- MyFTB: 3.1 million visits
- Tax forms: 760,000 visits

Slide 4: Filing Season Accomplishments Return Processing Highlights

- Personal Income Tax returns: 18.8 million filed
 - 95% filed electronically
- Refunds: 14.7 million issued
 - 78% issued by direct deposit
- Tax payments: 8.4 million received
 - 64% received electronically

Slide 5: Filing Season Accomplishments Customer Service Highlights

- Phone calls: 893,000 answered
 - Level of Access: 54%
- Chats: 128,000 answered
- Average wait times

- Phones: 12:55 minutes
- Chat: 10:19 minutes

Slide 6: Filing Season Accomplishments

Virtual Hold Highlights

- Virtual holds offered: 559,000
- Virtual holds answered: 468,000
- Connection success rate: 82%

Slide 7: Filing Season Accomplishments

Customer Comments

- “Thank you to Kim station at 2518. She was able to see the error on my tax return and quickly made the corrections. I really appreciate the tax representatives, like Kim, who both helped and listened. GREAT job Kim! I cannot express how much I appreciated your help. Thank you!”
- “I was so surprised by how easy it was to use Live Chat to resolve my issue. Anthony was professional, prompt with his responses, and incredibly helpful. He was able to resolve my issue quickly. Thank you for this Live Chat feature. It is very effective.”

Slide 8: Public Counters

- Served over 56,000 customers this filing season
- Accomplished 94% approval rating from our customers

Slide 9: Public Counters

Customer Comments

- “I was a walk-in and no line, no appointment. The service and communication were excellent.”
- “It was quick, service was kind, knowledgeable and expedient.”

Slide 10: Supporting Taxpayers Impacted by Disasters

A screenshot of the Emergency tax relief webpage is shown from the Franchise Tax Board website located at www.ftb.ca.gov/file/when-to-file/Emergency-tax-relief.html

- Extending deadlines
- Delaying notices
- Updating our systems and procedures
- Providing education and outreach

Slide 11: Supporting Taxpayers Impacted by Disasters (Continued)

- Local Assistance Centers (LACs)/Disaster Recovery Centers (DRCs)
 - 41 FTB staff provided help
 - 39 Centers
 - 2,290 survivors assisted

Slide 12: Programs Benefiting California

- Volunteer Income Tax Assistance (VITA)
 - FTB staff certified: 79
 - New FTB staff trained: 74
 - In-person events: 26
 - Prepared Federal and State returns: 4,556

Slide 13: Programs Benefiting California (Continued)

- California Earned Income Tax Credit (CalEITC)
 - 345,000 outreach letters mailed
 - 3,550,000 returns filed
 - 408,000 Young Child Tax Credit (YCTC) qualifying returns filed
 - 4,800 Foster Youth Tax Credit (FYTC) qualifying returns filed
- CalFile
 - 87,000 returns filed

Slide 14: Closing Summary

- Supported our workforce
- Improved our systems
- Served the citizens of California

Slide 15: Questions?

Slide 16: Public Comment