

EDR² Update PowerPoint

Franchise Tax Board Meeting

Monday, March 24, 2025

Slide 1: EDR² Update

Presenters' Names: Jose Orozco – EDR² Technology Director, Jennifer Roussel – EDR² Business Director
March 24, 2025

Slide 2: Background

Tax Modernization Plan (30-Year Vision)

- EDR¹: 2007-2015
- EDR²: Implementation started 2021, current project 2016-2026
- EDR³: 2026-2035

Slide 3: Primary Focus of EDR²

- Transition siloed Audit, Collections, and Filing Enforcement (FE) systems to the Enterprise Tax System
- Create new self-service options
- Enhance modeling capabilities
- Create new data visualizations

Slide 4: Early Initiatives and Pilot

- New Personal Income Tax (PIT) Audit and Filing Enforcement analytic models
- New data sources for Collections
- New PIT Payer File – “Manage Assets and Income” Solution
- PIT Audit Candidate Selection Pilot

Slide 5: EDR² Implementation

Timeline

2023-2026: New Self-Services, Modeling Capabilities, Data Visualizations, and Additional Data Captured

- 2023
 - Audit & Protest Case Management Solution (PIT)
- 2024
 - Collections Case Management Solution (PIT)
 - Audit & Protest Case Management Solution (PTE & BE)
- 2025
 - Collections Case Management Solution (BE)
 - Legal Case Management Solution
 - Filing Enforcement Case Management Solution (PIT & BE)

- 2026
 - Warranty Period
 - Project Closeout

Slide 6: EDR² User Testimonials

PIT Audit Solution

“Initially, I was cautiously optimistic about the idea of merging the legacy systems into ETS. I liked the idea of simplifying processes and was curious to see how it would work.”

“One of the best improvements is how many of our old procedures and checklists are no longer necessary. While there are still bugs and workarounds to address, the system (when working properly) will streamline the process and save time.”

Alt text: A photo of Brian Kwong appears alongside his testimonial.

Slide 7: EDR² User Testimonials (Continued)

PIT Collections Solution

“My initial thoughts of the new PIT Collections systems were very positive. I was excited about its potential to streamline our processes and improve our workflow efficiency.”

“I really appreciate the intuitive interface and how it significantly enhances our productivity by saving valuable time. I find that the new interface is incredibly easy to navigate, which makes our work much smoother.”

Alt text: A photo of Sonia Torres appears alongside her testimonial.

Slide 8: Project Update

Status, Budget, and Risk Mitigation

- Project Overall Health: Favorable
- Project Status:
 - Risks have approved mitigation plans
 - No impact to planned completion date or scope
 - Within budget of most recently approved Special Project Report

Slide 9: Questions?

Slide 10: Public Comment