

Meeting Taxpayer Needs



The Board is committed to helping all California businesses and individuals properly comply with the state's complex and changing tax laws. The agency offers a full range of services tailored to the diverse needs of the state's businesses—from 24-hour electronic services to personal assistance with tax compliance questions.

Resources and Assistance

Information Center: 800-400-7115

In 2005-2006, the Board's Information Center received over 460,000 calls from taxpayers, tax practitioners, and the general public. Eighty-two percent of callers spoke with customer service representatives, an increase of 6,000 calls from 2004-05. The remaining 18 percent of callers took advantage of the toll-free system's automated services, which include a fax feature for selected forms and publications, recordings of sales tax rates, and an interactive seller's permit verification system. Callers experienced an average wait time of only 53 seconds, a decrease of seven seconds from the previous fiscal year's average. In addition to handling hundreds of thousands of calls, Information Center staff responded to nearly 15,000 general tax question e-mails received from website visitors, an increase of 15 percent from 2004-05.

Internet Site: www.boe.ca.gov

The Board's extensive website provides forms, publications, regulations, reports, tax news, meeting agendas and special features for taxpayers, local governments, and the general public.



Publications

Pamphlets, Special Notices, and Newsletters

In 2005-06, tax program and communications experts created and updated a variety of publications and produced and distributed a number of special notices. Bright, attractive new publication designs encouraged readers to learn more about tax and fee compliance. This fiscal year, new pamphlets were developed to inform taxpayers about appeal hearings, and about E-file, the electronic filing option. New pamphlets also covered contribution disclosure statements, taxpayer advocacy services, and resources available to California businesses. The agency continued to publish four tax newsletters that serve more than one million readers. For a full list of publications and newsletters, see the [Appendix](#).

The Electronic Waste Recycling Fee Section introduced publication 95, *Electronic Waste Recycling Fee*. The publication provides general information to retailers on the E-waste program. Initially, 100 copies of the publication were sent to each district office with the cooperation of the Sales and Use Tax Policy Division. District offices were requested to provide a copy of the publication to all entities who indicated retail sales of covered electronic devices on their application for a seller's permit. Publication 95 can be downloaded from the Board's website.

The Electronic Waste Recycling Fee Section also included more than 23,000 supplemental flyers titled, "Dial before you file!" The flyers were included with fee return mailings as part of an outreach to encourage feepayers to call for assistance before filing returns. The flyer also provided answers to common filing questions and included supplemental return instructions to assist feepayers in filing their returns accurately.

Translated Forms and Publications

To promote tax compliance and better serve the needs of California's diverse business community, the Board translates publications into 22 languages. In fiscal year 2005-06, the Board published seven new Spanish translated publications, two new Korean translated publications, and one new Chinese translated publication. The Board revised 19 existing non-English publications.

Interpreter Services

As part of its commitment to serve all Californians, the Board provides interpreter services in its offices and at Board hearings. The agency's Equal Employment Opportunity Office uses annual language surveys to maintain a list of bilingual and multilingual employees. The list currently includes 1,019 employees who together speak 82 different languages and dialects, including American Sign Language.

Taxpayer and Public Outreach

As part of our education and outreach, audit staff make appointments to visit businesses and meet with individuals to discuss applicable tax or fee programs, and to determine if they are applying the law correctly to their business transactions. The goal is to properly educate taxpayers so they can avoid reporting errors on future returns.

Classes, Seminars, and Presentations

Sales and Use Tax Classes

In 2005-06, Board staff conducted more than 300 Basic Sales and Use Tax and Tax Return Preparation classes throughout the state, providing education and information to over 5,000 California taxpayers. The class is offered in English and Spanish. Information on classes can be found at www.boe.ca.gov under the topic sales and use tax, "Events and Training" section.

Online Tutorial for Sales and Use Tax

As an alternative to attending an instructor-led Basic Sales and Use Tax Class, an online tutorial is available in English, which provides taxpayers the same information but in a self-paced environment. The tutorial is also located at the above website.

Small Business Fairs

In 2005-06, the Board joined with federal, state, and local agencies in sponsoring 12 free, all-day tax events, bringing important tax compliance information to nearly 4,000 taxpayers and tax practitioners throughout the state. Attendees obtained individual assistance and materials at tax agency booths and attended classes on common tax subjects.



This engineer grabs his orders by pulling the string. They give him authority to be on the track, and directions about how to travel the stretch ahead. The other orders could be for the conductor or other train employees.

Nonprofit Educational Seminars

In a collaborative effort focused on meeting the unique tax education needs of the state's nonprofit sector, the Board conducted a number of full-day, multi-agency nonprofit seminars throughout California. The events brought together Board legal, sales, and property tax experts as well as representatives of the Franchise Tax Board, Internal Revenue Service, Employment Development Department, and the Office of the Attorney General. Participants were able to attend presentations and receive individualized tax advice.

Taxpayer Educational Consultation Program

This year, Board auditors provided individualized tax information, education, and assistance through the consultation program to 407 sales and use taxpayers during their first year of business. Participating taxpayers were very satisfied with the auditors' courtesy and professionalism and appreciated the service provided.

Internet

The Board assisted the State Association of Bankruptcy Attorneys with the creation of a webpage that includes information on the Board's tax and fees programs for use by bankruptcy practitioners and others across the country. The Board's Legal Affairs team received a Certificate of Appreciation from the association for its help.

Speakers Bureau

The Sales and Use Tax Department continued outreach to business groups by providing speakers for professional societies, industry and trade groups, governmental organizations, and local schools statewide. In addition, staff conducted bilingual seminars for business owners who spoke Chinese, Vietnamese, Spanish, and Thai.

Media

The Board's Communications Office issued news releases on 72 topics, and made daily contacts with print, radio and television reporters. Official Board spokespersons were quoted in newspapers across the state and nation, and were featured in news and consumer reports broadcasts on television and radio. The office designed and implemented an online advertising campaign urging online shoppers to comply with the state's use tax laws. Communications staff also worked with their counterparts at the Franchise Tax Board and the Employment Development Department to redesign the state's online tax service center, www.taxes.ca.gov. The office also facilitated major coverage of new Board programs and regulatory issues.

Taxpayers' Rights Advocate

The responsibilities of the Board's Taxpayers' Rights Advocate are mandated by law. The Advocate's office facilitates resolution of taxpayer complaints or problems, monitors Board programs for compliance with the California Taxpayers' Bill of Rights, recommends new or revised policies and procedures, and reviews taxpayer educational materials. The Advocate also coordinates annual public hearings to allow taxpayers to express their concerns and suggestions directly to the elected Board Members. In the past, Taxpayers' Bill of Rights hearings were held in the fall. Beginning in 2006, hearings were held in the spring. In the fall of 2005 and spring of 2006, hearings were held in Culver City and Sacramento.