State of California

Board of Equalization
Sales and Use Tax Department

Memorandum

To : Honorable Betty T. Yee, Chairwoman
Honorable Judy Chu, Ph.D., Vice-Chair
Honorable Bill Leonard
Honorable Michelle Steel
Honorable John Chiang

Date : April 11, 2007

From : Randie L. Henry, Deputy Director
Sales and Use Tax Department

Subject : **Electronic Services Projects/Activities Update**

Attached for your reference is a matrix that identifies the current electronic services (e-services) projects and activities. The matrix tracks the progress of the various projects and activities that, when implemented, will provide additional functionality and ultimately expand e-services eligibility to all tax and fee program accounts. An updated version of the matrix will be provided to you monthly.

Thank you for your continued support of our e-services programs. Should you have any questions regarding the information provided, please feel free to contact me at 916-445-1441 or Mr. Jeff McGuire at 916-324-1825.

RLH:jm:mlm

Attachment

cc: Mr. Ramon J. Hirsig
Mr. Alan LoFaso
Mr. Mark Ibele
Mr. Steve Shea
Ms. Barbara Alby
Mr. Erik Caldwell
Ms. Marcy Jo Mandel
Ms. Karen Johnson
Mr. David Gau
Mr. Jeff McGuire
Ms. Michelle Maciel
Mr. Dan Levy

Board of Equalization
Electronic Services Projects/Activities
Monthly Status at a Glance
April 2007

Project	Business JADs	Technology JADs	Design	Construction	Testing	Training	Scheduled Implementation
Special Projects 2006							
Quarterly Prepayment Return	√	√	√	√	√	√	√ 03/07
Quarterly Prepayment -Forms	√	√	√	√	IP	NS	05/07
Credit Cards for E-filing	√	√	√	√	IP	NS	05/07
Credit Cards for all Accounts Receivables/Special Taxes Returns	√	√	√	√	IP	NS	05/07
E-filing Enhancements							
Account History for E-filed Returns	√	√	√	IP			07/07
Co-Browse Functionality[1]	√	√	N/A Software Purchase				07/07
Fiscal Year 2007-08, E-filing Infrastructure[2]							
Payment by Check	√						11/07
Pre-fill of Paid Prepayment Amounts	NS						11/07
E-filing for Mandatory EFT	√						02/08
Multiple Location	IP						06/08
Delinquent Prepayments	NS						06/08

Activities	Status	Due Date	Activities	Status	Due Date
Fiscal Year 2008-10 FSR		7/07 (to DOF)	**Outreach Efforts**		
Business Requirements	IP	05/07	Outreach Plan	√	03/07
Screen Mock-ups	IP	05/07	Envelope Overprint (new)	√	03/07
Narrative	IP	05/07	1/3 Sheet Mailers - E-filing (new)	IP	04/07
TSD Costing	IP	05/07	Incentive/Marketing Items	IP	04/07
Economic Analysis Worksheets	NS	06/07	Initial Focus Groups	IP	04/07
Cost/Benefit Analysis	IP	06/07	On-Line Tutorial/Video	IP	08/07
			Combined Seller's Permit/E-file Registration Process	IP	05/07 Pilot 08/07
			Toss the Paper Campaign	IP	05/07 Pilot
Fiscal Year 2008-10 BCP		09/07 (to DOF)	**Planning – Fiscal Year 2007-08**		
Narrative	NS	06/07	Information Technology Procurement Plan	√	03/07

√ = Completed
NS = Not started
IP = In process
N/A = Task not applicable
JADs = Joint Application Development Sessions

[1] Will allow for real-time resolution of taxpayer e-filing issues.
[2] Scheduled implementation dates are contingent upon approval of requested funding. If funding is approved, projects will begin 7/1/07.