



BOARD OF EQUALIZATION

**CUSTOMER SERVICE AND ADMINISTRATIVE  
EFFICIENCY COMMITTEE MEETING MINUTES**HONORABLE BILL LEONARD, COMMITTEE CHAIR  
450 N STREET, SACRAMENTO

MARCH 18, 2008, 9:30 A.M.

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**ACTION ITEMS & STATUS REPORT ITEMS****Agenda Item No: 1****Title:** E-Services Status Update**Issue/Topic:**

Update regarding the Board of Equalization's electronic services projects, activities and outreach efforts.

**Committee Discussion:**

Committee Chair Bill Leonard opened the Committee meeting by introducing the agenda items and asked the staff to give an update on E-Services and the Electronic Transition Plan.

Ms. Michelle Maciel, BOE E-Services Team, provided an update on the status of e-services projects and activities. Ms. Maciel reported the projects for fiscal year 2007-08 are on schedule and within budget.

Ms. Maciel then gave an update on the Express login, pay-by-check option, and district office activities.

Board Members discussed the need for outreach to small and minority businesses, specifically efforts to address language assistance.

Staff informed the Board Members that the outreach plan is multi-faceted and includes working with community partners throughout California to provide targeted outreach for small businesses in multiple languages.

Board Member Betty Yee commended the Sales and Use Tax Department staff for staying on track with the expansion. She commented that "...it's really phenomenal in terms of the services we will be able to provide for our taxpayers". Mr. Leonard concurred. Ms. Yee also emphasized using the tremendous language talent within our district offices in our outreach efforts to taxpayers.

Board Members also discussed the advantages of using electronic means of communications more regularly.

Staff informed the Board Members that there are efforts currently underway to modify the system to allow program to customize electronic communications.

## **Agenda Item No: 2**

**Title:** Electronic Filing Demonstration

### **Issue/Topic:**

Demonstration of the Board of Equalization's filing system, BOE-file.

### **Committee Discussion:**

Mr. Bill Hain, BOE E-Services Team, gave an efile demonstration using the Express login option. The demonstration started with Express login and each subsequent step a taxpayer would have to follow to file and pay the sales and use tax.

Board Members discussed retention of file history. In addition, they discussed how a taxpayer could get personal assistance when filing an electronic return. Board Members suggested adding the Information Center 1-800 telephone number to system. Mr. Leonard asked to have the number appear on each screen or on the help buttons.

Staff informed the Board Members that file history is available from the inception date of efilings. In addition, staff will add the Information Center 1-800 telephone number to the system.

Committee Chair Bill Leonard thanked the staff for an excellent presentation.

## **Agenda Item No: 3**

**Title:** E-File Transition Plan

### **Issue/Topic:**

Discussion of staff's proposed plan to transition sales and use taxpayers from paper to electronic filing.

### **Committee Discussion:**

Mr. McGuire presented the Electronic Services Transition Plan which will shift the default for sales tax return filing from a paper based system to an efilings system.

Mr. McGuire informed the Board Members to increase the pace of taxpayer participation that the outreach approach will be modified from an "awareness campaign" to a "participation campaign". Mr. McGuire described the transition plan as a "prescription" plan that allows the transition to electronic filing without the need for a mandate.

He gave the Board Members an overview of how new and existing taxpayers would be phased in over the next two years. In addition, he informed the Members on the various means of notification and assistance that would be used and offered to the taxpayer during the transition. Mr. McGuire stated that overall, it is believed this plan will accomplish the savings envisioned by

