

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

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

Date: November 20, 2007

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

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

E-Services continues to expand as more features are added and outreach efforts increase. A current status report of e-services projects and outreach efforts follows. Also, attached for your quick reference is a matrix that identifies the current status of electronic services projects and activities. The matrix includes information on all 2007-08 E-filing Infrastructure projects and other activities not listed below.

Express Login

Effective November 19, 2007, taxpayers have two options to e-file their tax returns and prepayments. Taxpayers can still register to become an e-client or they can use the new Express Login. The new Express Login allows taxpayers to skip the registration process and go straight to e-filing a return or prepayment with just their account number and a unique Express Login Code assigned to their account.

Pay by Check

In addition to credit card and ACH debit (e-check) payment methods, taxpayers can now electronically file their return and pay with a paper check. Effective November 19, 2007, a taxpayer can choose "paper check" as their payment option. After the return is electronically submitted, a voucher will print below the confirmation page showing the balance due, including penalty and interest, if applicable. Mailing instructions are included on the voucher.

View History

Now taxpayers can view prior BOE-filed returns. Effective July 2007, taxpayers who are registered e-clients can view and print the confirmation page of a previously e-filed return. The confirmation page includes a transcript of the return.

E-Services Contacts

E-Services Contacts have been established in all district offices, some branch offices and headquarters sections. These contacts act as a resource and provide first line support to staff as well as promote e-services. They are the central contact for all e-services communications between headquarters and the field. Kick-off meetings were held for field office employees in Northern and Southern California. The kick-off meeting for headquarters contacts will be held in December or January.

Combined Registration

In an effort to increase e-filing participation, taxpayers will be registered as e-clients at the same time they are registering for a Seller's Permit. E-Services Contacts from the district offices have already been trained and are currently briefing their staff on the process. All counter staff in the field will be trained and registering e-clients by January 2008.

District Office Orientation

Members of the E-Services Team will visit each of the district offices and some of the branch offices in December and January to provide an overview of e-services. The team will demonstrate the e-filing system including E-Client registration, Express Login, filing a return, filing a prepayment and the three different payment methods. Future e-services enhancements will also be discussed. In addition, staff will present information on marketing e-services to increase taxpayer participation including the combined registration process.

Toss the Paper

The Toss the Paper pilot successfully increased e-filing participation and gave us valuable feedback on taxpayers willingness to voluntarily switch to e-filing. Three groups of 1,000 taxpayers were randomly selected to receive an invitation to e-file in lieu of their paper return. In May 2007, 22% of the targeted 1000 monthly filers e-filed their tax return. The participation rate remained the same for the following four months. The fiscal year and the quarterly basis filers both e-filed at a percentage of 21%. The overall participation rate for all eligible accounts for the third quarter 2007 returns was 3%. Currently, the results of this pilot are being evaluated and plans are being made to expand this campaign.

Tax Professional Workshops

In August and September, members of the E-Services Team participated in the Joint Tax Professional E-file Workshops with the Franchise Tax Board, Employment Development Department and the Internal Revenue Service. Locations for the eleven workshops included Southern California, Northern California and the Bay Area. Tax professionals received the latest information about e-filing with the Board of Equalization as staff provided a demonstration on registration as an e-client and filing an electronic return.

Customer Management Software

The Call Center will begin using new Customer Management Software in the beginning of December 2007. This functionality allows for real-time resolution of taxpayer e-filing issues by allowing Call Center staff to view the e-filing system screens live with the taxpayer.

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

RLH:lmk:

Attachment

cc: Mr. Alan LoFaso
Mr. Steve Shea
Mr. Mark Ibele
Ms. Barbara Alby
Mr. Erik Caldwell
Ms. Marcy Jo Mandel
Mr. Ramon J. Hirsig, MIC 73
Mr. David Gau, MIC 63
Mr. Jeffrey McGuire, MIC 92
Ms. Michelle Maciel, MIC 92

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Project	Business JADs	User JADs	System JADs	Design	Construction	Testing	Training	Scheduled Implementation
E-filing Enhancements								
Express Login ¹	√	√	√	√	√	√	√	11/07
Customer Management Software ²	√	√	√	N/A Software Purchase		IP	IP	12/07
Fiscal Year 2007-08, E-filing Infrastructure								
Payment by Check	√	√	√	√	√	√	√	11/07
Pre-fill of Paid Prepayment Amounts	√	√	√	IP	IP	NS	NS	04/08
E-filing for Mandatory EFT	√	√	√	IP				04/08
Multiple Location	IP	IP						07/08
Delinquent Prepayments	NS							06/08

Activities	Status	Due Date	Activities	Status	Due Date
Fiscal Year 2008-10³			Outreach Efforts		
Feasibility Study Report	√	7/07 (to DOF)	On-Line Tutorial/Video	IP	1/08
Budget Change Proposal	√	09/07 (to DOF)	District Office Contact Meetings	√	11/07
			1/3 Sheet Mailers		Continuous
Combined Seller's Permit/E-file Registration Process			Posters	IP	11/08
Pilot – Oakland/West Covina Offices	√		Speaking Engagements		Continuous
Statewide Rollout	IP	01/08	Taxpayer Training Materials	IP	01/08
			Intranet (eBOE) E-services Page	NS	01/08
			Toss the Paper Campaign	√	10/07

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

¹ Will allow taxpayers to e-file without registering as an e-client.

² Will allow for real-time resolution of taxpayer e-filing issues.

³ Waiting for approval from the Department of Finance.