

# Memorandum

To: Honorable Betty T. Yee, Chairwoman  
Honorable Jerome E. Horton, Vice-Chair  
Honorable Bill Leonard  
Honorable Michelle Steel  
Honorable John Chiang

Date: October 27, 2009



From: Anita Gore, Deputy Director  
External Affairs Department

Subject: **Status Report Regarding Status of Online Educational and Learning Products  
November 17, 2009 - Customer Service and Administrative Efficiency Committee**

This memo is to provide you with the information you requested regarding the status of the Board of Equalization (BOE) online educational and learning products. All products have been completed as scheduled to date.

### **Completed Online Educational and Learning Products Due November 1, 2009**

According to schedule, the following elements of the online educational and learning products have been completed.

- TRA Introductory Comments Video.
- Enhanced Sales and Use Tax Nonprofit Seminar Voice-over.
- Step-by-step instructions on how to use the online products.
- Toll-free information call center number included on all online products.
- Information about how to get in-person assistance at the district offices included on tutorial page.
- An e-mail box has been set-up specifically for each presentation to date.
- Systems set-up for Property Tax Department and Investigations/Excise Taxes Departments to ensure taxpayers receive a timely response to queries.
- Links to related publications listed with each presentation.
- Printable versions of the presentation are available on web.
- New permit holders now receive information about the online products in their seller's permit packages.
- E-mail sent to ListServ of approximately 14,000 taxpayers.
- Article published in the Tax Information Bulletin.
- Online learning products included in new version of Publication 51, *Board of Equalization Resource Guide to Free Tax Products and Services*.

The BOE currently has five online seminars with the following number of page views from August 2009 through September 2009. The seminars are also available on DVD and CD.

- Basic Sales and Use Tax – 2,321
- Property Tax for Nonprofit and Exempt Organizations Video – 984
- Sales and Use Tax for Nonprofit and Exempt Organizations – 205
- eFile Video for Registering as an eClient and Filing an Electronic Sales and Use Tax Return – 1,660

- eFile Demonstration – 4,699
- Your Appeal Video – 315

In the last two months, 10,184 people viewed the online tutorials.

In the last seven months, 15,296 people watched the online tutorials.

If you need additional information or have any questions, please feel free to contact me.

AG:kh

cc: Mr. Alan LoFoso  
Ms. Barbara Alby  
Mr. Lou Barnett  
Ms. Marcy Jo Mandel  
Mr. Ramon J. Hirsig  
Ms. Diane Olson (MIC: 80)  
Ms. Kari Hammond (MIC: 19)