

FTB Website Redesign

Future State Priorities



Michelle Fallon, Communications Director

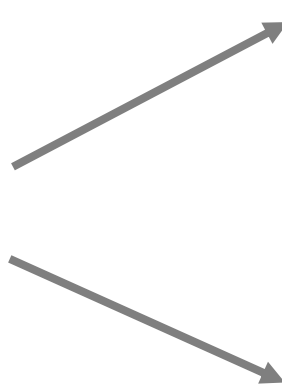
Daryl Lee, Corporate Communications Manager

CalCPA / October 25, 2019

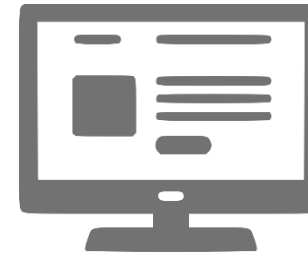
FTB Website Redesign

Project Strategy – Old to New

Old Website



New Website
3% Content
Satisfies 95% visits



Internal Repository
97% Content
Satisfies remaining 5% visits

New Website



Request Process



- ✓ Forms
- ✓ Content

FTB Website Redesign

Agenda

- Finding what you need
- Your priorities moving forward

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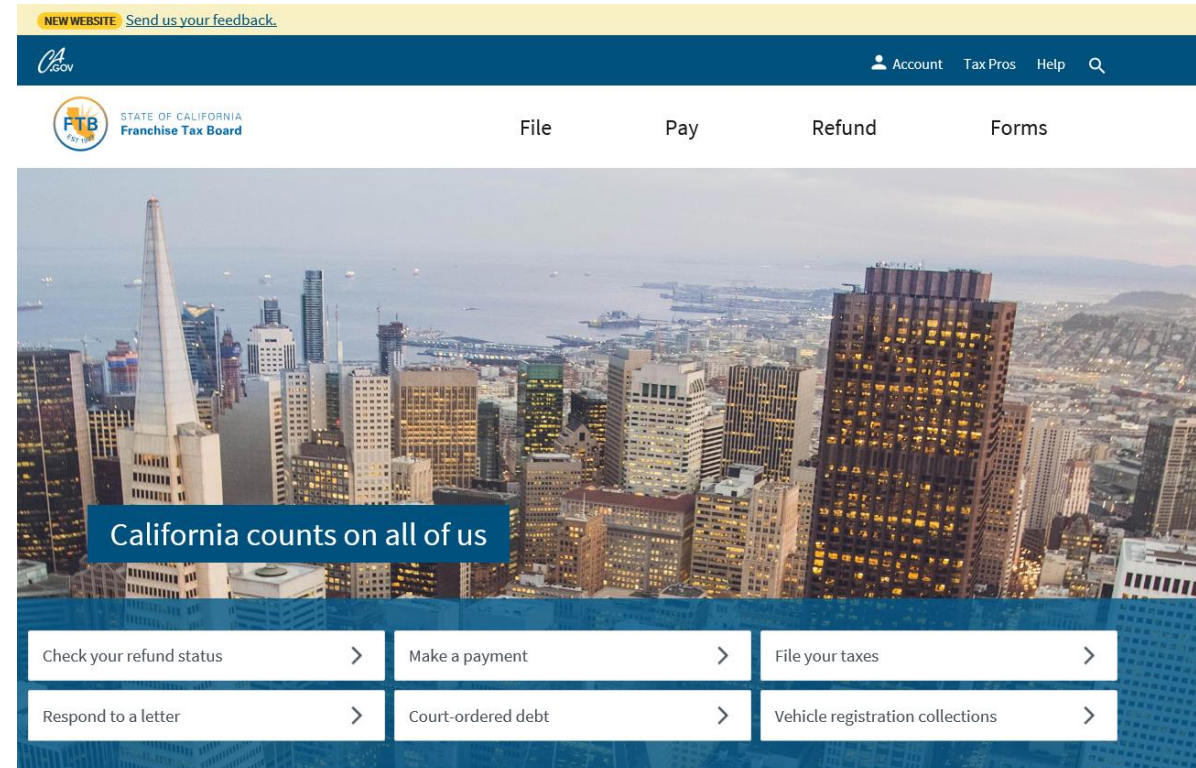
Finding what you need...

Tax Forms

- Forms Locator - TY 2008 – Current
 - TY 2015 – Current are accessible & immediately render
 - TY 2008 – TY 2014 – request via email process
- Old Forms: TY 2007 & prior – use request process

Publications

Legal resources



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Moving Forward

Current Website:

- ✓ 3% of Content
- ✓ Serves 95% of Customers

Cost: \$2 Mill

Where is the
future state of
ftb.ca.gov?



- ✓ 100% of Content
- ✓ Serves 100% of Customers

Cost: \$50 Mill



Helps Most Customers

Primary Tasks:

- ✓ File
- ✓ Pay
- ✓ Refund
- ✓ Notice

100% of content:

- ✓ Transparent
- ✓ Reduces Usability
- ✓ Old Reports / Docs with few or zero visits

FTB Website Redesign

Moving Forward

Prioritizing Future State: ftb.ca.gov

- Make all Tax Forms Accessible in Forms Locator
- Add all Tax Years to Forms Locator
- Make all Publications Accessible
- Top Requests for Content
- Other Ideas?:
 - ✓ Usability improvements
 - ✓ Add documents not available elsewhere



Thank You!