eVideos and Webinars

CDTFA
CALIFORNIA DEPARTMENT OF TAX AND FEE ADMINISTRATION
Who We Are

The CDTFA administers California’s:

- Sales and use taxes
- Fuel taxes
- Tobacco taxes
- Alcoholic Beverage tax
- Cannabis taxes, and
- Other special taxes and fees
Videos We Offer

Videos on Our Public Website

- Registering with the CDTFA
- Keeping Records
- Understanding the Resale Certificate
- Filing My Return
- Making A Payment
Videos We Offer

Videos on Our Public Website
• Paying Your Use Tax
• Contacting the CDTFA
• Relief Requests

www.cdtfa.ca.gov
• Online Services Tutorials Under “How Do I...”
• Industry Specific Tax Guides
Tax Guide for Cannabis Businesses

Filing a Cannabis Tax Return for Cannabis Distributors

EDUCATIONAL

FILING A
CANNABIS
TAX RETURN
Publicizing Our Videos

• Social Media -
• YouTube Channel
• Website Homepage
• Special Notices
• News Releases
Viewer Data

- Average almost 6,000 views per week
- Most popular videos cover how to file a return and how to create a Username and Password
Videos We Offer - Internal

- Internal Videos
  - Take 5 Videos
    - Over 60 Videos
- Deputy Director Monthly Videos
- Legislation Updates
Videos We Offer - Legislation Updates
Videos We Offer

• Internal Videos
  • Live Webinars Targeted to Certain Staff
    • Local Tax Allocations
    • Field Staff
Webinars

Keys to Webinars

• Prepare ahead of time
  • Biggest challenge is being legally accurate while communicating in a way
    the audience wants to listen

• Have a few canned questions/responses
  • Helps get audience going
  • Fill in if not a lot of questions

• Have a good question screener
  • Know what the panel can handle
  • Know the topic and what would be a good question
Making a Video

- Should we make a video?

<table>
<thead>
<tr>
<th>VIDEO PROJECT INFORMATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>REQUESTOR:</td>
</tr>
<tr>
<td>DATE:</td>
</tr>
<tr>
<td>DEPARTMENT REQUESTING VIDEO:</td>
</tr>
</tbody>
</table>

**Purpose / Goal of video:**

**Target Audience:**

**Describe the business need:**

**Describe settings where this video might be exhibited:**
- live events, trainings, conferences, other:

**Describe how the video will be distributed:**

**Describe how the video will be promoted:**

**WHAT CDITFA GOALS WILL THIS VIDEO SATISFY?**

- A) MAXIMIZE VOLUNTARY COMPLIANCE
- B) ENHANCE ORGANIZATIONAL EFFECTIVENESS
- C) INVEST IN THE ORGANIZATION
- D) OTHER - PLEASE EXPLAIN
Making a Video

• Things to Consider
  • “Shelf Life”
    • Will the information still be relevant in 1 or 2 years?
  • Time to produce
    • Average 10 staff hours per 1 finished minute of video
Making a Video

• Things to Consider
  • What is the need for the video program?
  • What are the goals and objectives of the video?
  • Who is the audience?
  • What will be the content?
Making a Video

• Script Writing Tips
  • Start by dividing your page into two columns
  • Right side (what you see)
  • Left side (what you hear)
## Making a Video

<table>
<thead>
<tr>
<th><strong>Audio</strong></th>
<th><strong>Video</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>There are many benefits to archiving your email. By archiving your email you increase storage space on your computer. Archiving your email allows you to keep your Outlook folders clean and organized. Not only can you also archive your email but calendar items and tasks can be archived as well.</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Title on top of screen</strong></td>
<td><strong>“Why Should We Archive Email”</strong>.</td>
</tr>
<tr>
<td><strong>Show 2010 inbox with a large number of emails</strong></td>
<td><strong>Show open Outlook window on windows desktop</strong></td>
</tr>
<tr>
<td><strong>Close ups of Outlook workflow in action.</strong></td>
<td><strong>Blur and show title “Manual” transition to “Auto Archive”</strong></td>
</tr>
<tr>
<td><strong>There are a few different methods you can use to archive your email.</strong></td>
<td><strong>Focus back to desktop and zoom into Outlook window.</strong></td>
</tr>
<tr>
<td><strong>You can archive “manually”, at any time you chose, or you can “auto archive”, letting outlook do the work for you.</strong></td>
<td><strong>Follow mouse cursor and we proceed through steps, highlighting items along the way.</strong></td>
</tr>
<tr>
<td><strong>Let’s begin with manually archiving email.</strong></td>
<td><strong>Highlight fields.</strong></td>
</tr>
<tr>
<td><strong>First, click on the file tab on the upper left corner of your screen. Make sure the “info” option is highlighted. Next, click the cleanup tool button on the bottom your screen. A menu will appear, click archive at the bottom of this pop up box. An archive box will appear.</strong></td>
<td><strong>In the archive box you are given the option to archive all of your Outlook files, such as emails calendars and tasks. Or you can specify a specific folder to archive. For example, you can select your Inbox or a specific subfolder within your inbox.</strong></td>
</tr>
</tbody>
</table>
Making a Video

- Script Writing Tips
  - Use plain language
  - Write the way you speak
  - Parentheticals, Acronyms and Numbers
  - Decide what type of approach your video will need
  - Sit with the production crew ahead of time and get on the same page
Making a Video

• Script Writing Tips
  • Consider the video's length
  • Use on-screen text to support what you say
  • Keep it simple
Making a Video

• Finishing Touches to the Script
  • Let someone in your intended audience read it over
  • Double-check the script to make sure it is exactly how you want it

• Use a Checklist
Making a Video

• Video Script Checklist
  • Any lists or main ideas that could be reinforced as text on the video screen?
  • In the video column of the script, have I described the type of video shots I need or special graphics/effects?
Making a Video - Resources

• Equipment and Software
  • Digital Cameras
    • DSLR
  • Editing Platform
    • Adobe Premier
    • Editing on Mac Workstations tied to an internal server
• Hi-Def Video uses a lot of data
Making a Video - Resources

• Staff
  • 4 Television Specialists
  • 1 Manager
  • 2 Associate Governmental Program Analysts for Internal Videos
Contact Information

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Questions?
City and County of San Francisco
Office of the Treasurer & Tax Collector
Who We Are

- Combined city and county, so we collect county taxes (property) as well as city taxes (payroll, gross receipts, hotel, parking, etc.)
- Robust tax environment with two new taxes proposed and passed in 2018 by the voters (Homelessness Gross Receipts, Commercial Rents Tax) and more taxes proposed
- About 100,000 registered businesses, about half sole proprietorships. About 12,000 file and pay the gross receipts tax (meaning GR over $1.1M)
- Proposition 218 governs our ability to communicate and causes us to be very cautious about interpreting our code
Who is the Audience?

- “Customer” base used to be thought of as CPAs, lawyers and tax professionals
- Now our typical customer is thought of as a part-time businesses – taxi/TNC drivers, rental hosts, independent contractors, lessors of real estate
- All major tax filings are online and there is some confusion with smaller taxpayers, technologically inexperienced taxpayers, and taxpayers who speak primary languages other than English
Videos We Offer

Videos on YouTube

- Business Registration Filing How-To
- Gross Receipts and Payroll Expense Tax Filing
- Social programs
Learnings

- Used to offer in person tax seminars – inefficient
- Then made intricate videos and translated into other languages – time consuming
- Now, make “low tech” webinar-style videos that show a typical filing experience
  - YouTube translates into other languages with captions, so no Prop 218 liability
- Most popular videos are about business registration – which affects all 100,000 businesses
Making a Video

- Content is generally around functionality of the online form, not in-depth tax advice
- TTX has used Skype/Webex to quickly and effectively produce videos
- Scripts are fully written and story-boarded to reduce re-takes and identify trouble spots
- Since it is hard for the audience to rewind, we write simple sentences, and repeat important points
Contact Information

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Who We Are

- Administer California’s employment tax program
  - Unemployment Insurance
  - Disability Insurance
  - Employment Training Tax
  - Personal Income Tax
- 1.5 million employers
- 18.6 million workers
Who is the Audience

• EDD Employees
• Customers of California
  • Employers
  • CPAs
  • Tax professionals
  • Claimants
What We Offer - Internal

Webinars

Auditor Training
What We Offer - External

e-Services for Business tutorials

YouTube Channel – 150 Videos
How We Share Our Videos

Social Media

EDD Website
Making a Video

- Adobe Presenter
- Adobe Connect
- Adobe Captivate
- YouTube
What We Learned

- Short videos keep the viewers attention.
- Succinct to a specific topic.
- Provide a table of contents.
- Make it engaging.
- The number of views on YouTube increased.
Contact Information

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Questions?