

Driving Results in a Digital Era

How Technology Improvements Expanded Access and Transparency



White Paper

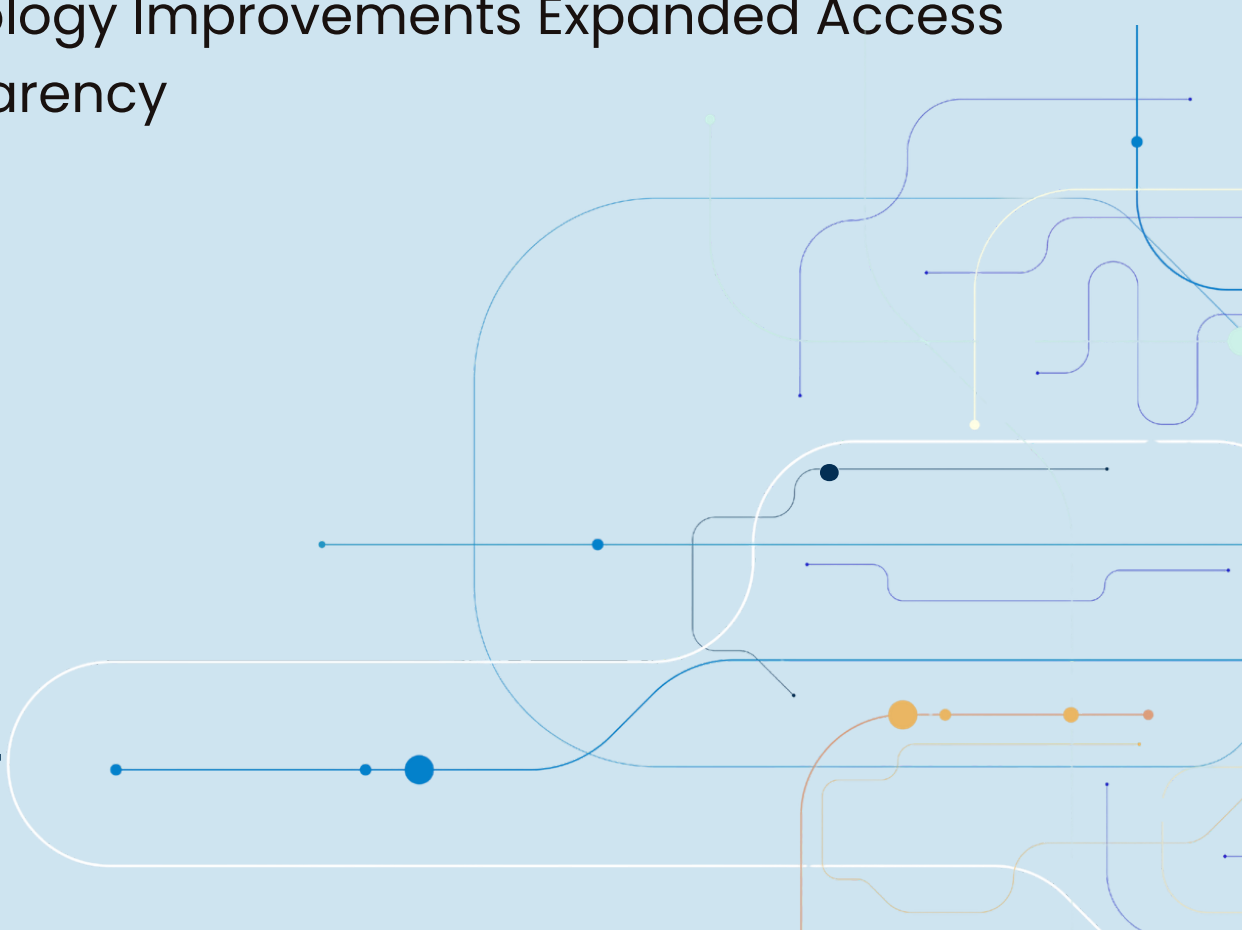




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Executive Summary

California taxpayers increasingly rely on digital tools to verify tax preparers, understand registration requirements, and access trusted regulatory information. Recognizing this shift, the California Tax Education Council (CTEC) undertook a comprehensive modernization of its digital platform that significantly expanded public access, improved transparency, and strengthened taxpayer protection.

Beginning in 2024, the Council set out to improve how taxpayers, CTEC-registered tax preparers (CRTPs), and education providers access information and services online. Informed by stakeholder feedback, an in-depth digital audit, and recommendations from the State's 2023 Sunset Review, CTEC transformed its digital infrastructure. The new platform launched in 2025, making regulatory information easier to find, understand, and use.

Key improvements included mobile optimization, multilingual support, enhanced search functionality, improved accessibility features, AI-assisted support tools, stronger security protocols, and upgraded online portals. These enhancements make it easier for users to access trusted information and complete important tasks with greater confidence.

The upgrade also expanded CTEC's digital reach. During the 2026 tax season, CTEC appeared in

more than 1.7 million Google search impressions, while organic search visibility increased by 28 percent.

Traffic from emerging AI-driven platforms also grew significantly, helping connect more Californians with trusted regulatory information and taxpayer protection resources.

This white paper examines the challenges identified within CTEC's previous digital infrastructure, the strategies implemented to address those concerns, and the measurable outcomes that followed. It demonstrates how strategic investments in technology can improve public access to regulatory information, strengthen transparency, and support CTEC's mission of protecting California taxpayers.

Within the first year of launch, CTEC **increased its online visibility by 28%**, making trusted taxpayer protection resources easier for Californians to find through organic search.



Identifying Gaps in Digital Access and User Experience

CTEC's previous website became less effective at meeting the needs of taxpayers, CRTPs, and education providers. Users often had difficulty navigating the site, finding information through search engines, and completing important tasks online.

To address these challenges, CTEC began a comprehensive modernization initiative in 2024, informed by an in-depth digital audit that included AI-assisted usability and search analysis.



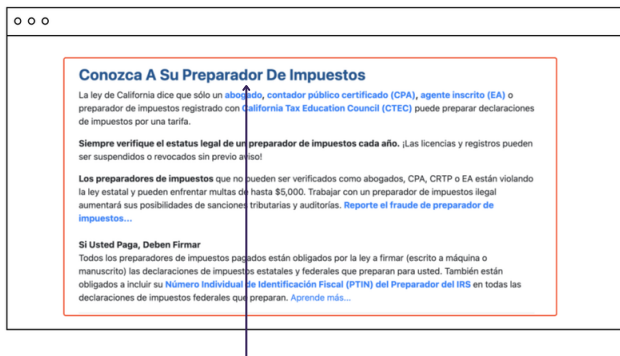
Identifying the Gaps: Issues with the Previous CTEC Website

The prior CTEC website presented significant barriers for users. Navigation was confusing, and essential information and calls-to-action were often difficult to find. Users encountered duplicate content, dead ends, and unclear pathways that made it difficult to find information relevant to their needs.

Key tasks—like verifying a preparer, locating education providers, or submitting reports—lacked clear guidance.

Education providers also encountered inefficient administrative processes, including a way to pay fees by credit card.

The site's support resources were limited, and mobile accessibility was inconsistent. The platform also required modernization to better support security, performance, and evolving user expectations. Overall, these issues hindered the user experience and limited engagement among those interacting with CTEC.



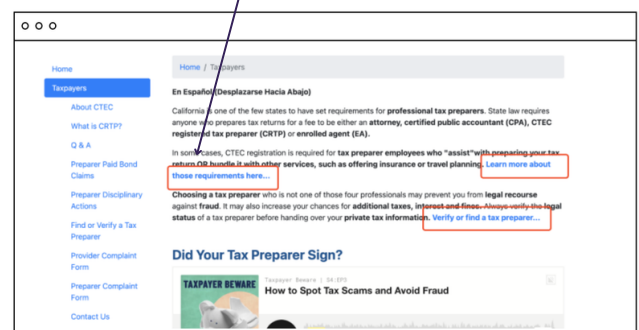
Language Localization and Translation Issues



Lack of Real-Time Feedback and Form Functionality



Confusing Calls-to-Actions and Pathways





Problems Identified: Findings from the Digital Audit

01

Navigation Challenges

The previous website presented confusing navigation and mixed content types, making it difficult for users to find information relevant to their needs.



02

Form Functionality

Users previously struggled with forms that lacked real-time feedback and clear guidance, leading to errors and inefficiencies when completing tasks.



03

Clarity of Key Features

Essential calls-to-action and links were not prominent enough, causing users to miss critical tasks such as finding a preparer or verifying credentials.



04

User Support

A lack of centralized support and real-time assistance previously caused user frustration and slow issue resolution.





Problems Identified: Findings from the Digital Audit

05

More Relevant Search

The initial search function returned irrelevant results and provided little helpful feedback, making it difficult for users to find the right information.



06

Language Translation

Language translation previously relied on duplicating pages, resulting in a disjointed user experience and maintenance challenges.



07

Weak CTAs

Calls-to-action were often missed or misunderstood, leading to lower engagement and conversion.



08

Unclear User Pathways

Role-specific information was previously hard to find, leading to frustration and longer browsing times.





What Did They Say?

CTEC surveyed education providers and CRTPs to gather feedback on the website and identify areas for improvement. Survey feedback highlighted navigation, modernization, and usability as key concerns among newer users and providers.

Most respondents in the 55–65 and older age groups reported few issues with the website, while younger respondents frequently recommended a more modern design, clearer navigation, and an improved user experience.

The design feels like it's from the 90s. The navigation is disorganized and more complicated than expected for a relatively simple site.



CRTP

I have managed to find the answers to my questions on the website, but the website is not all that intuitive.



CRTP

Application for NEW Tax Preparers – which may be confusing, it is not at all obvious if someone wants to become a CRTP and where to go to get this information.



Provider

Ability to pay for the provider applications with a credit card.



Provider

Maybe online chat if people need help. More useful articles, and processes for current CTEC users on how to do things.



CRTP



Addressing State Concerns

The 2023 Sunset Review identified concerns related to the accessibility and functionality of the CTEC website, as well as challenges affecting the overall user experience.

The report emphasized the need for improvements to better support CTEC's mission, facilitate compliance, and make information and online services easier to access and use.

The report included the following recommendation:

CTEC should provide increased information about Board and Committee personnel on its website for the public to access. CTEC should also consider posting its sunset report on its website.



Staff Recommendation



Staff Summary

CTEC has helpful information about what a CRTP is, preparer paid bond claims, provider complaint forms, etc. However, other than a few names and abbreviations for qualifications, it does not provide information on the Board membership in terms of bios and information, such as the case with other boards and bureaus. Sunset reports are also not available on CTEC's website. Moreover, its website could be modified to ensure greater accessibility by the public, its members, and other website visitors.



Modernizing the CTEC Platform

Following a comprehensive digital audit and stakeholder feedback, CTEC modernized its website and online services to improve access, ease of use, and alignment with Web Content Accessibility Guidelines (WCAG) and Americans with Disabilities Act (ADA) accessibility standards.

The redesigned platform makes it easier for taxpayers, CRTPs, and education providers to access trusted information, complete important tasks, and navigate CTEC's online services with greater ease.



Key Features of the New Website

Enhanced Search Feature:

Advanced search capabilities now use intelligent indexing and machine learning to deliver relevant results.

Intuitive Navigation:

Redesigned menus and a simplified site structure make it easier for taxpayers, CRTPs, and education providers to quickly find information and complete important tasks.

Mobile Optimization:

Responsive design ensures full functionality across all devices, with integrated language support.



AI Chat and Support Features:

AI-powered support and expanded FAQs provide immediate answers to common questions, helping users access trusted information more efficiently.



Enhanced Portal for Education Providers and CRTPs

Beyond the public-facing improvements, CTEC introduced a secure, modern portal tailored to the needs of CRTPs and education providers. Key enhancements include:

- **Upgraded Registration Process:** Includes clearer instructions, improved navigation, and dedicated callouts for key actions such as reporting a bond claim.
- **Streamlined Submissions:** The redesigned portal makes it easier for education providers to submit required documentation.
- **Convenient Online Payments:** Education providers can now pay fees securely by credit card, eliminating the need for paper checks and addressing one of the most frequently requested service enhancements.
- **Two-Step Authentication:** Provides an additional layer of account protection for CRTPs and education providers.

The image displays two views of the CTEC Tax Preparer New Application portal. The desktop monitor shows the initial registration steps: entering a Social Security Number, a confirmation checkbox, and a CAPTCHA. The tablet shows the 'Application Payment' section, which includes application details (Application Date: 12/3/2025, Application Cycle: 2023/2026, Application Type: OE, Application Fee: \$100.00, Processing Fee: \$2.00, Total Amount to be Charged: \$102.00) and payment information (Credit Card Number, Expiration Date, and CVV).

CTEC Tax Preparer New Application
CTEC Record Search

Enter Your Full Social Security Number

Click the confirmation box below to continue registration.

☐ I hereby attest that I am the same person for whom the registration application is being submitted. I understand that this attestation is required to confirm my identity and ensure the accuracy of the registration process.

☐ I'm not a robot

Continue New Application Process

CTEC Tax Preparer New Application
Application Payment

New Application Details

Application Date: 12/3/2025
Application Cycle: 2023/2026
Application Type: OE
Application Fee: \$100.00
Processing Fee: \$2.00
Total Amount to be Charged: \$102.00

Payment Information

Credit Card Number

Expiration Date: select month / select year

CVV (3 digits on back of card)

Submit Payment and Process New Application



Improving Access to Oversight and Taxpayer Protection Tools

Modernizing CTEC's digital platform improved not only access to taxpayer protection resources, but also the visibility and reach of those resources. Through enhanced search performance, expanded digital engagement, and AI-assisted support tools, CTEC increased its ability to connect taxpayers, CRTPs, and education providers with trusted regulatory information.



Expanded Reach and Public Access

CTEC's technology investments have expanded how users find information and get support online. Improvements in search performance, growing visibility across AI-powered platforms, and new digital support tools are helping taxpayers, CRTPs, and education providers connect with trusted regulatory information more easily.

During the 2026 tax season, CTEC appeared in Google search impressions more than 1.7 million times, while organic search visibility increased by 28 percent. CTEC now ranks for more than 11,700 search queries, with approximately 600 regulatory keywords appearing in the top 10 results.

These gains make it easier for Californians to find trusted information when choosing or verifying a preparer, understanding registration requirements, filing a consumer complaint, or accessing resources for approved education providers.

As online search behavior continues to evolve, CTEC is also reaching users through emerging AI-powered platforms. Traffic from these sources increased by more than 56 percent within the first year following the website launch.

CTEC also introduced an AI-powered assistant to provide immediate support for common questions.

The assistant independently resolves more than 80 percent of routine inquiries, maintains an 83 percent answer rate, and has earned an average 4 out of 5-star user satisfaction rating.

These improvements have strengthened CTEC's ability to meet users where they are—whether they are searching for answers, exploring information through AI-powered platforms, or seeking immediate support online.

1.7M+

Google Search Impressions

28%+

Organic Visibility Increase

600+

Top-10 Regulatory Keywords

11,700+

Organic Ranking Keywords

80%

Routine Inquires Resolved
by AI

4/5

User Satisfaction Rating

56%

Increase in AI Platform
Traffic



Conclusion

CTEC's investment in digital modernization demonstrates that technology is no longer simply an operational tool—it is an essential component of taxpayer protection.

As taxpayers, CRTPs, and education providers increasingly turn to digital channels for information and support, CTEC has transformed how it connects with and serves its users.

The results of this work extend far beyond a redesigned website. Improved search performance is helping more Californians discover trusted regulatory information and taxpayer protection resources. Emerging AI platforms are creating new pathways to CTEC information, while enhanced online services and AI-assisted support are helping users find answers, complete important tasks, and navigate CTEC requirements more efficiently.

By making trusted information easier to find, services easier to access, and support available when users need it, CTEC has strengthened

transparency and expanded public access to resources designed to protect California taxpayers.

As technology and online behavior continue to evolve, CTEC is positioned to respond to changing expectations and new ways of finding information. The investments made today provide a strong foundation for continued innovation—helping CTEC protect taxpayers, support compliance, and ensure Californians can connect with reliable tax information and resources when they need them.





Sources and Methodology

This white paper incorporates information from stakeholder feedback, website analytics, platform performance data, and recommendations identified in CTEC's 2023 Sunset Review.

Website usability findings and modernization recommendations were informed by a comprehensive digital audit conducted by 500 Designs, as well as feedback collected from CTEC registrants and education providers.

Website performance metrics, including search visibility, keyword rankings, search impressions, and traffic trends, were derived from internal website analytics, search engine optimization, and LLM referral traffic reporting tools. Data reflects activity through April 2026 unless otherwise noted.

AI-assistant performance metrics, including answer rate, automated inquiry resolution rate, and user satisfaction ratings, were derived from Tidio platform analytics and reporting tools.

*Unless otherwise noted, all website performance metrics reflect activity between January and April 2026 and were derived from Google Analytics 4, Google Search Console, and related SEO reporting tools.

References

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California Tax Education Council. *CRTP and Education Provider Website Survey Results (2024)*.

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