



Proposed

HR Date: 09/02/2021

HR Initials: RP

Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
Classification Title Tax Program Technician I (TPT I)	Position Number 564-832-9587-990
Working Title Production Unit Technician	Bureau and Section Processing Services Bureau/Information Validation Section

Our mission is to help taxpayers file timely and accurate tax returns, and pay the correct amount to fund services important to Californians. In order to support this mission, FTB employees strive to develop in CalHR's Core Competencies: Collaboration, Communication, Customer Engagement, Digital Fluency, Diversity and Inclusion, Innovative Mindset, Interpersonal Skills, and Resilience. Core competencies are the knowledge, skills, and behaviors which are foundational to all state employees regardless of classification.

General Statement

Under the general supervision of a Tax Program Supervisor, the Tax Program Technician I will perform a variety of entry and full journey level functions necessary to accurately process Personal Income Tax (PIT) and/or Business Entity (BE) tax returns, payments, and general communication. The job duties are performed in a processing environment across Business Entities and Information Validation Sections. The Production Unit Technician may have limited contact with taxpayers regarding additional information necessary to process tax returns and/or payments. Staff may be rotated or loaned to other Sections as workload priorities shift.

Essential Functions

Percentage	Description
60%	Examine and process income tax returns using FTB systems and applications. Perform necessary adjustments or corrections to taxpayer accounts, in order to post returns/payments. Communicate with internal and external customers to expedite processing. Determine and take appropriate action to refer correspondence/returns/payments/calls to other (program areas) sections/bureaus/divisions. Validate and/or review all necessary tax forms to ensure accurate processing of income tax returns. Apply all applicable policies and procedures when processing correspondence, returns, and payments. Report system issues to supervisor.
30%	Resolve questions and ensure procedures are followed. Provide input for updating procedure manuals. Assist with the development of procedures for implementation of new workloads and change management. May be required to process various time sensitive workloads throughout the year. Maintain accurate individual timekeeping reports on a daily basis.

Marginal Functions

Percentage	Description
10%	May attend meetings and or coordinate with other units/sections to provide updates on workloads and procedures. Assist with training and coaching of new staff, including on the job training.

Employee: I confirm that I have read and understand the described duties and functions of this position.

Name (Print)

Signature

Date

Supervisor: I certify that the above information accurately represents the described duties and functions of this position.

Name (Print)

Signature

Date



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