



Duty Statement

Request for Personnel Action (RPA) Number 2324-01291	Effective Date
Classification Title Tax Program Technician I	Position Number 564-740-9587-002
Working Title Tax Program Technician I	Bureau and Section Processing Services Bureau/Information Capture and Banking Section

Our mission is to help taxpayers file timely and accurate tax returns and pay the correct amount to fund services important to Californians. 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 (TPS) in the Information Capture and Banking Section (ICBS), the Tax Program Technician I (TPT I) works primarily in the Bad Documents Resolution area, resolving errors identified with the processing of tax returns and checks. The incumbent is also involved in the Work Control and Management Information System processes. The TPT I works with returns and payments for the Personal Income Tax (PIT) and Business Entities (BE) workloads. The Technical, Administrative, and Operational Support Unit (TAOSU) is production-oriented, requiring staff to work independently and with a team, exercise good judgement, and be flexible.

Physical Requirements

Stand or walk for prolonged periods, lift blocks of returns (5 to 20 lbs.), lift trays of vouchers (5 to 15 lbs.), and/or push trucks of returns (45 to 135 lbs.).

Essential Functions

Percentage	Description
50%	Process work in the Bad Documents Resolution area and assist with maintaining procedures utilized for all processes. This includes, but is not limited to identifying, researching, and resolving various check scanning issues. Assisting with the review of reports generated by transactions being deleted, during the Image Processing and Cashiering System (IPACS) cashiering process, the iCapture system, and re-associating documents with checks rejected during processing. Workloads include both Pit and BE.
20%	Provides technical and training support for the IPACS and iCapture systems. Research missing or misapplied payments to taxpayer accounts using Taxpayer Information System (TI), Business Entities, Tax System (BETS), and/or Taxpayer Folder (TPF).
20%	Generates detailed reports by workload, prepares up-to-date inventory and aged reports daily. Assist in retrieving reports and other information, to aid the section's operational, resource, and budgetary process. Assists in coordinating any special work requests from other sections in the Division. Facilitates the Work control Process.

Marginal Functions

Percentage	Description
10%	May serve as a team member on special projects. May attend meetings with representatives from other units to represent the section.

Signature Authorization

If I choose to sign this form electronically, I agree that my electronic signature is a legally binding equivalent to my handwritten signature on a paper form.

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