



Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
Classification Title Tax Technician	Position Number 564-622-7505-XXX
Working Title Tax Technician	Bureau and Section Special Programs Bureau Specialized Collection 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 the Administrator I, the incumbent is responsible for the collection/resolution of decedent cases and responds to incoming calls and correspondence involving decedent and probate issues. The incumbent files, amends and withdraws creditor claims as appropriate. The incumbent must be able to translate details from various laws and computer files, explain applicable tax laws to fiduciaries and beneficiaries, and apply collection remedies appropriate to this specialized workload.

Essential Functions

Percentage	Description
45%	Responds to telephone calls and correspondence on accounts assigned to the Probate Group. Identifies issues within a probate proceeding, which may require legal actions necessary to ensure payment and/or protect the States interest.
30%	Maintains an assigned inventory of less complex decedent accounts. Follow up on assigned accounts, including sending and receiving faxes. Initiates collection activities and follows up on account assignments regularly to ensure commitments are met and collection actions are taken timely. Conducts investigation of assigned accounts and pooled accounts, and initiates appropriate collection action when assets are discovered.
20%	Reviews and determines validity of assessments and the collection potential of accounts during the preprocessing process. Participates as a team member in conducting training and in brainstorming session during team meetings.

Marginal Functions

Percentage	Description
5%	Participates as a team member in conducting training and in brainstorming session during team meetings. Assist with other assignments and duties as required.



Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
Classification Title Tax Technician	Position Number 564-622-7505-XXX
Working Title Tax Technician	Bureau and Section Special Programs Bureau Specialized Collection & Administrative Support 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 the Administrator I, the incumbent is responsible for the screening and various support duties in the group. The Offer in Compromise Program (OIC) is for taxpayers who do not have, and will not have in the foreseeable future, the money, assets or means to pay their tax liability. It allows a taxpayer to offer a lesser amount for payment of a non-disputed final tax liability. FTB's OIC program is authorized by section 19443 of the Revenue and Taxation Code. The incumbent is cross trained to handle internal and external customer contacts including inbound/outbound calls, chats, and/or correspondence. The incumbent will constantly strive to continually improve quality and customer satisfaction.

Essential Functions

Percentage	Description
40%	Review incoming OIC packages to determine completeness and acknowledge receipt of the package in writing. Contact taxpayers or their representative if additional information is needed. The review process includes analyzing the Accounts Receivables Collection System (ARCS) system to determine the appropriate state the account should be placed in, i.e., the OIC Initial Hold state or a secondary state. Analyze the Taxpayer Information System to determine if all required tax returns have been filed. Address missing years and determine if a filing requirement exists, analyze supporting documentation (bank statements and income and expense statements) for completeness. Prepare offer packages and documentation for referral to the specialists.
35%	Develop the less complex OIC requests that have passed the screening process. This includes offers on low-profile taxpayers with lower account balances. Evaluate financial statements, bank records, assets and other documentation submitted with the offer. Determine taxpayers’ financial situation and future earnings potential and if the account should be submitted for approval, denial or withdrawal. Develop narrative summaries on accepted OIC offers based on a taxpayer’s financial situation and a recommendation for approval; including all supporting documentation assembled in exhibit form. Prepare denial or withdrawal letters on unaccepted offers. Recommend the appropriate resolution which may include Installment Agreement, temporary hardship, or discharge.
15%	Respond to the less complex incoming phone calls on the OIC Public Phone line. Callers include taxpayers, tax practitioners or referrals from various areas of the department. Answer general questions regarding the OIC program and policies and the provide timeframes regarding processing an Offer. Respond to OIC correspondence.

Marginal Functions

Percentage	Description
10%	Update the OIC logs and prepare monthly OIC Screening Stats in order to maintain statistical data. Maintain filing system on resolved OIC cases. Prepare and route payments, returns and Power of Attorney (POA) forms for processing. Onboard new student assistants. Assist with other assignments and duties as required.

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



Duty Statement

Request for Personnel Action (RPA) Number 2324-01805	Effective Date
Classification Title Tax Technician	Position Number 564-633-7505-XXX
Working Title Tax Technician	Bureau and Section PIT Billing, Compliance and Collection Bureau PBCCB

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 the Administrator I, the Tax Technician receives telephone calls from an Automatic Call Distribution (ACD) system and answers questions regarding Personal Income Tax (PIT) law, Installment Agreement (IA) procedures, and collection processes used by the department. The incumbent evaluates less complex taxpayer account information to determine if an IA should be established. The incumbent analyzes account information, modifies existing levies, requests account adjustments, and establishes IAs over the telephone. The incumbent also responds to written collection correspondence and processes information received via fax.

Essential Functions

Percentage	Description
40%	Provides customer service to taxpayers by explaining provisions of PIT law, IA procedures, and collection processes administered by the department. Explains the basis for taxpayer liabilities, resolves Accounts Receivable Collection System (ARCS) notice inquiries, and handles liability disputes.
20%	Reviews taxpayer accounts, initiates transactions to correct account errors, requests lien releases, and modifies or releases existing earnings withholding orders and bank levies.
15%	Reviews and responds to the less complex taxpayer correspondence on accounts from various ARCS functional areas.
15%	Reviews ARCS work lists to determine appropriate action based on established criteria and procedures. Processes information received by fax.
5%	Reviews and responds to written requests for IAs and correspondence related to the IA program. Analyzes financial statements, determines if account liability meets IA criteria, and recommends IA plans.

Marginal Functions

Percentage	Description
5%	Acts as a program resource to provide workload review, one-on-one training, or other special assignments representing the PIT Collection call center.

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



Duty Statement

Request for Personnel Action (RPA) Number 2324-01819	Effective Date
Classification Title Tax Technician	Position Number 564-636-7505-XXX
Working Title Tax Technician	Bureau and Section Business Entity Collection Bureau BE Collection Operations 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 the Administrator I, the incumbent responds to taxpayer inquiries through Automatic Call Distribution (ACD), correspondence, FTB Secure Messaging, and Live Chat regarding Business Entity (BE) Income Tax law, Installment Agreement (IA) procedures, and the department's collection processes. The incumbent's primary responsibilities involve analyzing less complex account information, modifying existing levies, requesting account adjustments, and establishing IAs. Tax Technicians prevent future liabilities by educating taxpayers, collecting the proper tax amount, and promoting taxpayer compliance. The incumbent will exercise professionalism and use good judgment to assist the customer. The incumbent is cross trained to handle internal and external customer contacts including inbound/outbound calls, chats, and/or correspondence.

Essential Functions

Percentage	Description
45%	Provides customer service to taxpayers or representatives by explaining provisions of BE Income Tax law and collection processes (voluntary and involuntary) administered by the department. Explains the basis for taxpayer liabilities, resolves Accounts Receivable Collection System (ARCS) notice inquiries, and handles liability disputes. Interviews taxpayers to obtain asset information to secure their liability and resolve their account. Assists supervisors and leads, as needed, to ensure that processing goals are met.
30%	Ensures due process by evaluating accounting and collection system information and prior actions taken in Business Entities Tax System (BETS), ARCS, Taxpayer Folder (TPF), and Case Management (CM). Reviews other relevant electronic files such as Integrated Non-Filer Compliance (INC), Taxpayer Information (TI), Secretary of State (SOS), Department of Motor Vehicles (DMV), and documents such as the taxpayer's returns and financial statements. Outlines a plan of action to resolve the case and/or initiate transactions to correct account errors, request lien releases, or modify/release bank levies.
20%	Thoroughly document all pertinent information obtained from contacts, actions taken, and potential next actions in the collection systems. Cases meeting rollover criteria are referred for reassignment to Compliance Representatives for additional analysis or escalated actions, which may include involuntary collection action.

Marginal Functions

Percentage	Description
5%	Acts as a program resource to provide workload review, mentor training, or other special assignments representing the BE Collection Call Center.

Signature Authorization

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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



Duty Statement

Request for Personnel Action (RPA) Number 2324-01889	Effective Date
Classification Title Tax Technician	Position Number 564-648-7505-XXX
Working Title Tax Technician	Bureau and Section Statewide Collection Bureau Public Collections, Contracts, and Support 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 an Administrator I, the incumbent responds to taxpayer and/or contractor telephone calls and/or correspondence on contract collection accounts. The incumbent participates in the resolution process with peers and others to identify and resolve out-of-state collection related issues.

Essential Functions

Percentage	Description
35%	Respond to Automated Call Distribution (ACD) calls received from taxpayers or their representative related to cases identified for out-of-state collection strategies. Ability to address liability disputes, filing requirements, non-resident filing requirements, assessments, residency issues, audit issues, sales of real property and military issues. Evaluate financial statements and make determinations on taxpayer requests for installment agreements or the modification of garnishments using set criteria. Appropriately comment Taxpayer Folder (TPF).
30%	Analyze cases identified for various out-of-state collection strategies, update entity information, initiate legal actions, review and determine the validity of assessments, adjust accounts as necessary, and update various systems such as Accounts Receivable Collection System (ARCS), Taxpayer Information (TI), and TPF.
10%	Respond to correspondence within Case Management (CM) related to varied questions from taxpayers and their representatives regarding the basis of the balance due, and assist with various out-of-state workloads as needed. Explain computations of tax, penalties and interest to taxpayers, Power of Attorney (POA)s and other third parties to resolve lien issues.
10%	Provide ACD assistance to Federal Treasury Offset Program (FTOP) and other program areas as needed.
10%	Review work lists and account history to determine appropriate action based on established criteria and procedures.

Marginal Functions

Percentage	Description
5%	Participate in one-on-one training or other special work related assignments representing the Out-of-State Collection Program.

Signature Authorization

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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



Duty Statement

Request for Personnel Action (RPA) Number 2324-01891	Effective Date
Classification Title Tax Technician	Position Number 564-649-7505-XXX
Working Title Tax Technician	Bureau and Section Statewide Collection Bureau Public Collections, Contracts, and Support 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 the Administrator I, the Tax Technician receives telephone calls from an Automatic Call Distribution (ACD) system and answers questions regarding Personal Income Tax (PIT) Law, Business Entity (BE) Income Tax Law, Federal Treasury Offset Program (FTOP) procedures, Installment Agreement (IA) procedures, and Collection processes used by the Department. The technician analyzes account information, modifies existing levies, requests account adjustments, and establishes IAs over the telephone. The technician also responds to written collection correspondence while working within Case Management (CM).

Essential Functions

Percentage	Description
45%	Provides customer service to taxpayers by explaining provisions of PIT laws, BE Tax laws, FTOP requirements and procedures, IA procedures, and collection processes administered by the Department. Explains the basis for taxpayer liabilities, resolves FTOP notice inquiries, and handles liability disputes. Accurately comments the Taxpayer Folder (TPF).
20%	Reviews FTOP work lists to determine appropriate action, such as placing a FTOP hold on an account, updating the name control at the Treasury department and/or requesting the account to be withdrawn from the Treasury department, based on established criteria and procedures.
15%	Reviews taxpayer accounts, assesses financial hardships, initiates transactions to correct account errors, requests lien releases, and modifies or releases existing earnings withholding orders and bank levies.
10%	Reviews and responds to taxpayer correspondence resulting from FTOP notices in order to bring the taxpayer into compliance either through the filing of a return or entering into an installment agreement.
5%	Provide ACD assistance to Out of State Revenue Collection unit and other program areas as needed.

Marginal Functions

Percentage	Description
5%	May act as a resource to management for special assignments and tasks representing the program and Bureau.

Signature Authorization

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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



Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
Classification Title Tax Technician	Position Number 564-657-7505-XXX
Working Title Tax Technician	Bureau and Section Field and Complex Account Collection Bureau

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 an Administrator I, the incumbent will perform paraprofessional tasks of tax and nontax law, regulation, and policy enforcement at the Franchise Tax Board; and to do other related work. The incumbent will use the knowledge of all phases of debt collection and tax compliance to proactively perform all aspects of compliance work to resolve accounts and educate taxpayers to prevent future tax liabilities and non-compliance

Additional Information

This position is included within Account Receivables Management's (ARM) Rotational Hiring Effort for a period of 60 months. At the completion of the rotational period, the candidate will return to positions located in the ARM Division. Consideration will be given to the applicant's preference and every effort will be made to match those requests. However, candidates will be placed into positions based ultimately on operational and business needs of the ARM Division.

Essential Functions

Percentage	Description
50%	Utilizes collection skills and tools to efficiently and effectively resolve moderately complex or sensitive collection accounts. Ensures due process has been provided and all attempts to resolve case voluntarily have been made prior to invoking involuntary collection actions. Analyzes and reviews cases and financial information to determine appropriate collection actions. Contacts delinquent taxpayers via telephone, skip tracing, correspondence, and third party contacts to request payment in full, explain assessments and gain compliance to resolve collections cases. Provides education to taxpayers and businesses in order to gain future compliance. Responsible for maintaining and monitoring collection caseload on a daily basis for follow up and to ensure that commitments are met by taxpayers, businesses and/or their representatives and initiates appropriate collection action.
40%	Public Counter functions communicate with personal and business tax taxpayers directly in person to advise and explain various provisions of laws and regulations administered by the Department; resolve collection notice problems; handle liability disputes; initiate transactions to correct account errors and modify or release accounts; explain the basis for the liabilities; identify, analyze, and release liens; analyze financial statements and recommend payment arrangement plans; issue assessments for missing years; and recommend discharge from accountability. Provide Business Entity revivor requirements and process requests that meet requirements.



Duty Statement

Request for Personnel Action (RPA) Number 2324-01893	Effective Date
Classification Title Tax Technician	Position Number 564-672-7505-XXX
Working Title Tax Technician	Bureau and Section Statewide Collection Bureau Public Collections, Contracts, and Support Sections

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 an Administrator I, the incumbent evaluates delinquent non-tax debt for Court-Ordered Debt Collections (COD) and Vehicle Registration Collections (VRC) as well as Dishonored Check (DC) accounts to determine appropriate resolution; answers questions and provides debtors with direction on general collection related matters of the NTD programs; adheres and applies the standard collection procedures and processes used by the department.

Essential Functions

Percentage	Description
50%	Responds to incoming telephone calls from the Automated Call Distribution (ACD) System to resolve collection accounts relating to NTD. Provides information regarding account balances and determines the appropriate method of collections needed to assist the debtor in resolving their accounts.
30%	Analyzes debtor accounts and associated collection actions and determines the need to make appropriate account adjustments including, but not limited to, the modification or release of garnishments and negotiating short-term payment arrangements based on a review of the customer’s financial situation. Makes appropriate account adjustments to resolve the debtor’s collection account. Issues, modifies, or releases involuntary collection actions and responds to written correspondence received from the debtor to assist the debtor in resolving their accounts.
10%	Performs other work-related duties as required including, but not limited to, fund transfers, system transactions, and various manual workloads. Researches delinquent accounts to locate identifying information on the delinquent debt owed from the system-generated reports. May participate in a cross-training program to learn and assist with the NTD Collections workload via the ACD system and correspondence.

Marginal Functions

Percentage	Description
5%	Serves as a program liaison with NTD external clients/partners to assist in account maintenance, account updates, answer account related questions, and resolve debt accounts.
5%	Performs other duties as required including, but not limited to gathering of data used in preparation of statistical reports to meet program goals and expectations. Act as a program resource to provide one-on-one training, or other special assignments representing NTD’s contact center.

Signature Authorization

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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



Duty Statement

Request for Personnel Action (RPA) Number 2324-01895	Effective Date
Classification Title Tax Technician	Position Number 564-674-7505-XXX
Working Title Tax Technician	Bureau and Section Statewide Collection Bureau Public Collections, Contracts, and Support Sections

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 an Administrator I, the incumbent evaluates delinquent non-tax debt for Court-Ordered Debt Collections (COD) and Vehicle Registration Collections (VRC) as well as Dishonored Check (DC) accounts to determine appropriate resolution; answers questions and provides debtors with direction on general collection related matters of the NTD programs; adheres and applies the standard collection procedures and processes used by the department.

Essential Functions

Percentage	Description
50%	Responds to incoming telephone calls from the Automated Call Distribution (ACD) System to resolve collection accounts relating to NTD. Provides information regarding account balances and determines the appropriate method of collections needed to assist the debtor in resolving their accounts.
30%	Analyzes debtor accounts and associated collection actions and determines the need to make appropriate account adjustments including, but not limited to, the modification or release of garnishments and negotiating short-term payment arrangements based on a review of the customer's financial situation. Makes appropriate account adjustments to resolve the debtor's collection account. Issues, modifies, or releases involuntary collection actions and responds to written correspondence received from the debtor to assist the debtor in resolving their accounts.
10%	Performs other work-related duties as required including, but not limited to, fund transfers, system transactions, and various manual workloads. Researches delinquent accounts to locate identifying information on the delinquent debt owed from the system-generated reports. May participate in a cross-training program to learn and assist with the NTD Collections workload via the ACD system and correspondence.

Marginal Functions

Percentage	Description
5%	Serves as a program liaison with NTD external clients/partners to assist in account maintenance, account updates, answer account related questions, and resolve debt accounts.
5%	Performs other duties as required including, but not limited to gathering of data used in preparation of statistical reports to meet program goals and expectations. Act as a program resource to provide one-on-one training, or other special assignments representing NTD's contact center.

Signature Authorization

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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



Duty Statement

Request for Personnel Action (RPA) Number 2324-01897	Effective Date
Classification Title Tax Technician	Position Number 564-675-7505-XXX
Working Title Tax Technician	Bureau and Section Statewide Collection Bureau Public Collections, Contracts, and Support 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 the Administrator I, and the technical direction of a lead person, the incumbent is responsible for performing a variety of duties regarding the interception of Personal Income Tax (PIT) refunds, lottery winnings and unclaimed property claims to repay debts owed to other state agencies, county, educational institutions, cities and IRS. Provide excellent customer service when answering calls from debtors. Act as a liaison for various sections within the department.

Essential Functions

Percentage	Description
50%	Provide excellent customer service when answering Automatic Call Distribution (ACD) calls from debtors by immediately responding to questions regarding the intercept program. In addition, provide information to debtors inquiring about offsets of Personal Income Tax refunds (PIT), lottery winnings and unclaimed property claims such as the requesting agency name and contact information and amount of offset. May require researching the lottery winnings and unclaimed property reports to identify the payment. Refer debtors to appropriate agency as needed. Perform TI transactions and request manual refunds as needed. Appropriately comment applicable systems (i.e. TI, Taxpayer Folder, etc.). Identify program issues and communicate to Management. Notify Management of calls that are sensitive or will potentially escalate.
20%	Manual workloads such as reviewing and processing manual Bank and Corporation intercept requests received from California Department of Tax and Fee Administration (CDTFA) and Employment Development Department (EDD). Respond to phone requests regarding PIT offset information from CDTFA and EDD. Complete these tasks by analyzing both PIT and BE accounts.
15%	Review and respond to debtor correspondence resulting from IIC notices through Case Management.
10%	Provide back-up assistance for various workloads to include: process modification requests and, prepare requests either for manual process or through nightly TI batch, prepare and mail weekly and monthly reports to participating agencies, reproduce weekly summary reports using microfiche and provide to agencies, or gather statistical program data.

Marginal Functions

Percentage	Description
5%	May act as a resource to management for special assignments and tasks representing the program and Bureau.

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