



## Duty Statement

Request for Personnel Action (RPA) Number 2526-02098	Effective Date
Classification Title Graduate Student Assistant	Position Number 564-813-4872-990
Working Title TAAP Graduate Student Assistant	Bureau and Section Taxpayers' Rights Advocate 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 close supervision of the Tax Appeals Assistance Program (TAAP) Analyst and Tax Counsel IV TAAP Supervising Attorney and in a learner capacity, the incumbent will assist in handling individual income and franchise tax matters for TAAP clients who have appealed a Franchise Tax Board (FTB) action to the Office of Tax Appeals (OTA), for more complicated TAAP cases; assisting to communicate with TAAP clients, gather evidence, conduct legal research and analysis, prepare and draft appellant briefs and assist with arguing administrative appeals before the OTA. The incumbent will also assist in working on transition cases requiring student coverage during TAAP semester breaks. The incumbent's responsibilities may include assisting the TAAP Supervising Attorney oversee TAAP students/interns during the semester, which may include attending and participating in TAAP class meetings, participating in peer review of briefs, case discussions, and participation in mock oral hearings, in an effort to foster learning and growth of TAAP students. The incumbent may also assist in other aspects of TAAP operations, including client intake and student recruitment efforts.

### Essential Functions

Percentage	Description
45%	In a learner capacity, assist in preparing and arguing income and franchise tax cases in administrative hearings before the Office of Tax Appeals. Duties include managing and handling all tasks needed to work TAAP cases, including interviewing taxpayers and reviewing information related to taxpayers' appeals, managing files and tracking deadlines, conducting factual investigations, legal research, and analysis; drafting advice letters, preparing briefs, negotiating with FTB for case resolutions, and arguing cases before the OTA during conferences and hearings.
40%	In a learner capacity, assist the TAAP Supervising Attorney oversee TAAP students/interns. Assist in providing direction and instruction to law students on relevant substantive tax laws and procedural rules governing the appeals process. Assist with onboarding new students and providing guidance on substantive and legal case work. Assist with reviewing drafts of students' advice letters and appellant briefs and providing feedback during in class case discussions and practice mock oral hearings. May also serve as a back-up/substitute to the TAAP Supervising Attorney in leading class meetings/discussions when out of the office.
10%	In a learner capacity, assists in reviewing, updating and editing TAAP handouts and other educational and outreach materials, procedural documents and letter templates.

## Marginal Functions

Percentage	Description
5%	In a learner capacity, assists with TAAP recruitment and outreach activities, including participating in interviews and presenting at virtual informational and marketing events.

### 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