



DUTY STATEMENT

Request for Personnel Action (RPA) Number ERPA-2526-00801	Effective Date
Classification Title Administrator I, FTB	Position Number 564-659-4358-002
Working Title Public Counter Supervisor	Bureau and Section Field & Complex Account Collection Bureau 621 Assistant Director Field Operations

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 direction of the Collection Program Manager, this position is responsible for the administration and effective operation of Public Counter activities and desk collections. You have the responsibility for making determinations on complex collection issues. You are expected to effectively plan, organize, develop procedures, direct operations, provide training, allocate resources, and guide activities toward established goals. You ensure that your team's performance supports the Bureau and Division business plans and departmental goals. You have final responsibility for your team's productivity and product quality.

Essential Functions

Percentage	Description

35%	You provide direction and supervision to public counter staff in the Field Office. You plan, organize, and direct the Public Counter operations and clerical support activities. You review and make determinations on requests for complex collections-related activities on all unassigned and some assigned collection accounts. You supervise public counter, cashiering, and Administrative staffing levels. You redirect the allocation of resources as necessary to ensure adequate staff throughout the year, compensating for seasonal volume fluctuations, as well as planned and unforeseen staff shortages.
25%	You identify skill sets required and provide necessary training to ensure that staff develop and perform to meet expectations of taxpayers, tax professionals, our overseers, and other stakeholders. You work with staff, taxpayers, and tax preparers to ensure they receive fair and equitable treatment and assistance at public counters.
10%	You interact regularly with Public Affairs and the Executive and Advocate Services section to provide input and secure feedback on emerging issues with field counter services. You perform problem resolution, and act as a liaison with tax preparers/attorneys to resolve disputes on complex issues. You intervene and resolve irate taxpayer contacts. You act as a liaison for other field offices to ensure cashiering guidelines, processes and documentation are accurate and adhered to. You coordinate communication with taxpayers, other field offices and third parties involving cashiering processes and procedures, and provide feedback and updates to established procedures to ensure excellent customer service.
10%	You prepare annual and probationary reports for each team member in order to provide coaching and guidance to help employees develop their performance or meet their own goals.
10%	You establish goals for your team and its members to meet the operational objectives of the Bureau and Division.

Marginal Functions

Percentage	Description
10%	You serve as a back-up for the Field Collector's Supervisor and act on behalf of the Field Office Manager as required. You are the contact person for legal process regarding court proceedings concerning regional public counter and clerical staff. You are also the contact for facilities/property management where you communicate with office staff and other state agencies regarding the safety, security, and general facility maintenance needs.

Employee:

