



DUTY STATEMENT

Request for Personnel Action (RPA) Number ERPA-2526-00903	Effective Date
Classification Title Compliance Representative, FTB	Position Number 564-674-8619-007
Working Title Compliance Representative Lead	Bureau and Section Statewide Collections Public Collections, Contracts & Support

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 close supervision of an Administrator I, the incumbent performs as the Compliance Representative Lead in the Public Collections, Contracts and Support Team. The team provides support for the Non-Tax Debt and Offset/Intercept tax collection programs. They process correspondence and faxes, modify levies, and perform various account transactions for the programs in the section. Generally, provides technical assistance to Tax Program Technician I's and temporary help staff. Participates as a team member in the group and in the operational change process with peers and others to identify and resolve work-related issues, consistent with the department's Mission and Values.

Essential Functions

Percentage	Description
40%	Provides technical expertise for a team of collection support staff. Reviews the work of Tax Program Technician I and temporary help staff within the team to evaluate and recommend actions taken. Reviews case history, comments and actions taken to ensure appropriate actions were taken. Reviews and approves specific account transactions from various programs in the section.
20%	Evaluates progress of support staff which includes specific examples of their strengths and weaknesses for input into the supervisory employee performance

	evaluations. Assists in identifying the training and development needs of members within the team. Assists in developing training plans to meet the individual needs of each team member. Assists with the formal and informal training of staff within the team.
20%	Maintains technical expertise in the area of collection and support service issues. Reviews and resolves standard issues. Develops consistent guidelines for review and recommends improvements that will produce a more efficient flow of work.
10%	Maintains technical, and assists with statistical data. Produces reports for the various programs in the section.

Marginal Functions

Percentage	Description
10%	Attends meetings as required. Participates on assigned projects. Other duties as required.

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