



Duty Statement

Request for Personnel Action (RPA) Number 2526-02783	Effective Date
Classification Title Tax Program Technician II	Position Number 564-790-9588-010
Working Title Tax Program Technician II (Lead)	Bureau and Section Processing Services Bureau/Receiving and Data Storage Section (RDSS)

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 a Tax Program Supervisor (TPS), the Tax Program Technician II (TPT II) acts as a lead of a production team and supports the operational needs of the Receiving and Data Storage Section. The incumbent provides daily instruction on work assignments to staff, ensure staff are supplied with correct and appropriate training, creates, communicates, and maintains procedures utilized for all processes. The incumbent will be the high-level technical expert and is involved with system maintenance, including troubleshooting, system releases/updates and annual changes.

Physical Requirements:

Transport cages of mail (1000 – 2000 lbs.). Move/lift trays of mail (7 to 15 lbs.), boxes of returns (25 – 45 lbs.), lift blocks of returns (up to 20 lbs.). Ability to push truck of returns (45 to 135 lbs.) Daily use of personal computer ranging from 1 to 8 hours per day. Ability to complete tasks that require repetitive wrist, arm, and shoulder motion. Bending, sitting, standing, or walking for prolonged periods of time

Essential Functions

Percentage	Description
40%	Lead team(s) and attend meetings with representatives from other units and/or sections. Assist with monitoring inventory and allocating resources. Will review the work of others to ensure accuracy and consistency with procedures, directives, and policies. Direct workflows and work assignments within the team. Monitor system workflows, to ensure return, correspondence and payments are processing correctly to departmental systems. Monitor and report scanning issues or concerns of high-speed imaging technology to the appropriate support partner.
30%	Process and validate highly complex accounts that require extensive customer contact. Assist in collecting inventory and statistical data to aid in the Section's operational, resource and budgetary processes. Act as a technical expert by identifying, researching, and resolving procedural issues. Provide first level of support for system problems for the various departmental applications. Assist with the development of new workload strategies, business forms, and procedures.
20%	Review responses to correspondence, questions, or issues to ensure accuracy and appropriate resolution. Collect and monitor training needs to address identified procedural or user concerns.

Marginal Functions

Percentage	Description
10%	May be assigned to special projects or other tasks as needed. May be required to represent the Franchise Tax Board in court proceedings, responding to question regarding factual data and procedural functions.

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