



## Duty Statement

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|--------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|
| Request for Personnel Action (RPA) Number<br><b>RPA 2627-00018</b> | Effective Date                                                                                                            |
| Classification Title<br><b>Tax Program Assistant</b>               | Position Number<br><b>564-389-1474-015</b>                                                                                |
| Working Title<br><b>Clerical Support</b>                           | Bureau and Section<br><b>Audit Services, Administration, and Protest Bureau/Audit Budget &amp; Administration Section</b> |

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 supervision of the Audit Business Support Tax Program Supervisor, the Tax Program Assistant (TPA) performs a variety of specialized clerical tasks in support of professional staff by completing any of the following duties, but not limited to, processing electronic correspondence, and receiving, reviewing, mailing, distributing, and scanning physical correspondence. In addition, the TPA is responsible for maintaining records for the Audit Division, updating procedure manuals, and completing special assignments as needed.

### Essential Functions

| Percentage | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 50%        | <p>Review incoming Audit electronic correspondence through Case Management (CM) and sort according to workload destination and case disposition. Research and retrieve additional information from other systems such as Taxpayer Information (TI), Business Entities Tax System (BETS), and Taxpayer Folder (TPF) as needed and add it to the case before sending the correspondence to its final workload destination, and providing support documentation to professional staff responsible for processing cases.</p> <p>Review incoming Audit physical correspondence and sort according to workload destination and case disposition. Scan, upload, and associate correspondence in CM, TPF or email Auditor, as needed. Retrieve and review Informant Hotline referrals, add to database, route electronic referral and physical mail to designated program. Retrieve and review IRS Settlements, process within required IRS timeframe and route to designated program. Retrieve and review returned Audit Division mail, research all Franchise Tax Board (FTB) systems to locate and update new information. Correspond with Auditors via email and phone to determine the appropriate handling of their physical correspondence.</p> <p>Receive requests for mailing letters and return processing from Auditors via email. Review Auditors' letters to ensure accuracy and the correct enclosures are included before mailing. Review the return processing requests to ensure the proper cover sheet and instructions for processing are included prior to delivery to Receiving and Data Storage Section (RDSS). Correspond with the Auditor via email and phone to notify completion of tasks.</p> |
| 40%        | <p>Retrieve and review computer-generated taxpayer notices from the Data Guidance Unit for processing as needed which may include completion of a USPS certificate of mailing.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |

| Percentage | Description                                                                                                                                                                                                      |
|------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|            | Examine and maintain Audit shared supply areas, printer bays, and mail stops multiple times each day to ensure Audit staff remain compliant with all FTB and IRS security requirements and supply needs are met. |
|            | Maintain tracking Excel spreadsheets for all workloads to provide management monthly inventory volumes.                                                                                                          |

### Marginal Functions

| Percentage | Description                                                                                                                                                                                                                                                                                                                           |
|------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 10%        | Provide training and guidance for new employees. Assist in the updating of unit procedure manuals. Participate in monthly staff meetings. Perform special projects and act as back up for other workloads within Audit Business Support as needed. Assist in the transfer of physical files to Central Office and or to Data Storage. |

### 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.

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|--------------|-----------|------|
|              |           |      |
| Name (Print) | Signature | Date |