



Duty Statement

Request for Personnel Action (RPA) Number 2627-00137	Effective Date
Classification Title Customer Service Supervisor	Position Number 564-725-1008-022
Working Title Customer Service Supervisor	Bureau and Section Filing Services Bureau (FSB)/ Taxpayer Services Center Section (TSCS)

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 Administrator I in the Filing Services, the Customer Service Supervisor directs and monitors the activities of phone and/or correspondence Customer Service Representatives (CSRs), Customer Service Specialists (CSSs), and Lead Compliance Representatives (CRs) in the Taxpayer Services Center Section (TSCS). In addition to understanding the section's operational goals, an extensive knowledge of the Personal Income Tax (PIT) and Business Entities (BE) laws and the department's processing procedures are required. The incumbent promotes a positive environment and ensure the operational goals and quality service objectives are met. When dealing with the public, the Customer Service Supervisor assists the customer in identifying the exact nature of the issue that prompted the elevation of the contact to a supervisor in order to resolve issues at the lowest level. The incumbent explains pertinent legal provisions, regulations, and related administrative practices and their application to specific cases.

Essential Functions

Percentage	Description
45%	Provide immediate guidance and support to staff to meet the department's public service objectives. Provide consistent coaching and feedback to leads and CSRs to ensure skills and abilities are continuously being developed. Hold monthly one-on-ones with CSRs, which include reviewing adherence, productivity, quality of work, and Qfiniti evaluations. Prepare probationary and annual performance evaluation reports, recognition nominations, and personnel actions as necessary. Review telephone calls taken by CSRs for accuracy, consistency, and professionalism when necessary. Identify training needs and provide one-on-one training when necessary for new and veteran employees, and work with management team to ensure proper development. Evaluate and recommend actions that may be taken to improve the quality and quantity of work produced by the section. Provide assistance to elevated customer issues by explaining legal provisions, regulations, and administrative practices.
20%	Sustain the daily operations of the contact center by maintaining communication with members of the management team and staff to build a productive, rewarding, and fun working environment. Together, provide the consistent exchange of critical information between manager groups to ensure operational effectiveness and cohesive teamwork. Utilize various section management tools (such as Qfiniti, Time Portal, CCPulse, EyeQ, and WFM) to make recommendations and decisions and take appropriate action to ensure the level of service objectives are met daily.

Percentage	Description
20%	Perform various administrative functions including maintaining up-to-date and accurate working folders, completing and submitting timesheets, and facilitating team meetings. Ensure development of staff. Participate in and lead special projects to improve the efficiency and effectiveness of the contact center and/or recognize staff achievements.
10%	Attend meetings, provide input, and assist in the issue resolution process. Provide excellent customer service to staff and management team by ensuring taxpayer and processing trends identified by staff are elevated timely to the appropriate areas.

Marginal Functions

Percentage	Description
5%	Participate in the recruitment, selection, and training of staff. Act as a back-up manager when needed.

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