



STATE OF CALIFORNIA
Franchise Tax Board

Current or Proposed

Proposed

Date Approved

07/28/2026

HR Initials

JS

DUTY STATEMENT

Request for Personnel Action (RPA) Number ERPA-2627-00032	Effective Date 10/07/2026
Classification Title Senior Compliance Representative, FTB	Position Number 564-728-8620-008
Working Title Senior Compliance Representative	Bureau and Section Filing Services Bureau CASES 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 general direction of an Administrator I, in Correspondence, Analysis, Support, and Education Section (CASES), the Senior Compliance Representative independently performs complex analysis and activities. The Enterprise Knowledge Library (EKL) will serve as a repository for storing information and a collaborative area where users can create, capture, share knowledge and information related to local and enterprise procedures, knowledge, and training materials. The incumbent will be the lead the transition, integration, rollout and upkeep of the EKL. The incumbent will also lead the effort to convert the RACK and utilize the Pega Knowledge Management (KM) platform to implement, publish, and update reference material for the EKL. The incumbent will play a critical role ensuring applicable standards and policies are met, organize the content, and provide technical assistance and training to partners responsible for the implementation and integration of the EKL. The incumbent must have knowledge of and experience using the Pega Knowledge Management platform, extensive knowledge of procedure writing with online manuals, knowledge of the RACK, Revenue and Taxation Code, and Franchise Tax Board policies and procedures to ensure EKL complies with all applicable policy and law.

Essential Functions

Percentage	Description
40%	Transition the reference material contained in the RACK by creating, publishing and maintaining content within the Pega Knowledge Management Platform tool; Maintain and update RACK procedures to reflect new Enterprise Tax System (ETS)

	application and processes to ensure procedural guidance is available during conversion efforts;
30%	Lead staff who will be assisting with the transition and integration of the RACK to the EKL; Prepare RACK and other reference material for EKL conversion; Ensure standards, policies, department writing standards and technical requirements are met for the publishing of internal and external content within EKL; Ensure proposed content is developed in line with the requirements to facilitate integration with Artificial Intelligence
20%	Participate in and conduct training for editor and knowledge management tools; Provide technical assistance to enterprise colleagues when creating EKL content and working within Pega Knowledge Management Platform

Marginal Functions

Percentage	Description
5%	Participate in meetings or collaborative efforts within FSB or enterprise-wide; Provide updates or information presentations to management, team members, or other areas developing content in EKL.
5%	Perform technical support and account analysis activities on complex accounts to ensure applicable procedures are in place to support the Personal and Corporation Tax Programs administered by FTB

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