



Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
Classification Title Tax Technician	Position Number 564-622-7505-XXX
Working Title Tax Technician	Bureau and Section Special Programs Bureau, Specialized Collection Section

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 supervision of the Administrator I, the Business Transfers (BT) & Strike Team Tax Technician is responsible for utilizing internal and external resources to help identify debts that may be collected upon. The incumbent is also cross trained to handle internal and external customer contacts for both Personal Income Tax (PIT) and Business Entity (BE) collection issues, for instance, inbound/outbound calls and correspondence. These inquiries include requests for information pertaining to all programs administered by the Special Programs Bureau (SPB).

Essential Functions

Percentage	Description
45%	Evaluate various sources of information identifying the sale of a business and/or assets of the business against various reports to help identify debts that may be collected through the sale. Maintain Business Transfer inventories and issue appropriate due process and/or collection action. Respond to escrow companies and debtors to resolve Personal Income Tax (PIT) and Business Entity (BE) collection accounts and issue appropriate responses to requestors. Work with internal and external customers, such as Department of Alcohol and Beverage Control (ABC) to issue holds and releases on liquor licenses.
45%	Cross-trained on multiple workloads within Special Programs Bureau (SPB) such as Decedent, Offer in Compromise (OIC), Lien, Innocent Spouse, Frivolous Activity Non-Filer (FAN), and Bankruptcy (BK) Programs to handle various workloads, such as inbound/outbound calls, correspondence, returned mail, screening, initiating correspondence, etc. Assist Special Programs Bureau (SPB) Programs and customers in resolving accounts under the PIT and BE tax laws utilizing various systems, such as Taxpayer Information (TI), Business Entities Tax System (BETS), Case Management (CM), Taxpayer Folder (TPF), Integrated Nonfiler Compliance (INC), and Lexis Nexis.

Marginal Functions

Percentage	Description
10%	Assist with other duties and projects within SPB and Accounts Receivable Management Division (ARMD) as needed, such as activation of PIT Contact Center call tree.

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
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Supervisor: I certify that the above information accurately represents the described duties and functions of this position.

_____ Name (Print)	_____ Signature	_____ Date
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Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
Classification Title Tax Technician	Position Number 564-622-7505-XXX
Working Title Tax Technician – Decedent Program	Bureau and Section Special Programs Bureau/Specialized Collection Section

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 supervision of the Administrator I, the incumbent is responsible for the collection/resolution of the Decedent Program cases and responds to incoming calls and correspondence involving decedent and probate issues. The incumbent files, amends, and withdraws creditor claims as appropriate. The incumbent must be able to translate details from various laws and computer files, explain applicable tax laws to fiduciaries and beneficiaries, and apply collection remedies appropriate to this specialized workload.

Essential Functions

Percentage	Description
45%	Responds to telephone calls and correspondence on accounts assigned to the Decedent Program. Identifies issues within a probate proceeding, which may require legal actions necessary to ensure payment and/or to protect the State's interest.
30%	Maintains an assigned inventory of less complex decedent accounts. Follows up on assigned accounts, including sending and receiving faxes. Initiates collection activities and follows up on account assignments regularly to ensure commitments are met and collection actions are taken timely. Conducts investigations of assigned accounts and pooled accounts within the Enterprise Tax System (ETS) and initiates appropriate collection action when assets are discovered.
20%	Reviews and determines validity of assessments and the collection potential of accounts during case preprocessing.

Marginal Functions

Percentage	Description
5%	Participates as a team member in conducting training and in brainstorming sessions during team meetings. Assists with other assignments and duties as required.

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Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
Classification Title Tax Technician	Position Number 564-622-7505-XXX
Working Title Offer in Compromise (OIC) Specialist	Bureau and Section Special Programs Bureau Specialized Collection Offer in Compromise Program

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 supervision of the Administrator I, the incumbent is responsible for the evaluation of Offers in Compromise (OIC) submitted by taxpayers and/or their representatives. OIC is for taxpayers who do not have, and will not have in the foreseeable future, money, assets, nor means to pay their tax liability. It allows a taxpayer to offer a lesser amount for payment of a non-disputed final tax liability. Franchise Tax Board's (FTB) OIC Program is authorized by section 19443 of the Revenue and Taxation Code (R&TC). The incumbent is cross-trained in both Personal Income Tax (PIT) and Business Entity (BE) tax, to handle internal and external customer contacts, inbound/outbound calls, and/or correspondence. The incumbent will continuously strive to improve quality of work and customer satisfaction.

Essential Functions

Percentage	Description
40%	Reviews incoming Offer in Compromise (OIC) packages to determine completeness and acknowledge receipt of the package in writing. Contacts taxpayers or their representatives if additional information is needed. The review process includes analyzing the Enterprise Tax Systems (ETS) and other available collection tools. Analyzes the account to determine if all required tax returns have been filed. Addresses missing years and determines if a filing requirement exists and analyzes supporting documentation such as bank statements and income and expense statements for completeness. Prepares offer packages and documentation for referral to the OIC Compliance Representative (CR) Specialist.
35%	Develop the less complex OIC requests that have passed the screening process. This includes offers on low-profile taxpayers with lower account balances. Evaluates financial statements, bank records, assets, and other documentation submitted with the offer. Determines taxpayers' financial situation and future earnings potential and if the account should be submitted for approval, denial, or withdrawal. Develops narrative summaries on accepted OIC offers based on a taxpayers financial situation and recommendation for approval, including all supporting documentation assembled in exhibit form. Prepares denial or withdrawal letters on unaccepted offers. Recommends the appropriate resolution which may include payment plans, temporary hardship, or discharge.
15%	Responds to the less complex incoming phone calls on the OIC Automatic Call Distribution (ACD) line. Callers include taxpayers, tax practitioners, as well as referrals from various areas of the department. Answers general questions regarding the OIC Program and policies and provides timeframes regarding processing an application. Respond to OIC correspondence.

Marginal Functions

Percentage	Description
10%	Updates the OIC logs and prepares monthly OIC screening stats in order to maintain statistical data. Maintains filing system on resolved OIC cases. Prepares and routes payments, returns, and Power of Attorney (POA) forms for processing. Onboards new Student Assistants. Assists with other assignments and duties as required.

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Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
Classification Title Tax Technician	Position Number 564-633-7505-XXX
Working Title Tax Technician Personal Income Tax (PIT) Collection	Bureau and Section PIT Billing, Compliance and Collection Bureau Collection Response and Resolution Section

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 supervision of the Administrator I, the Tax Technician receives telephone calls from an Automatic Call Distribution (ACD) system and answers questions regarding Personal Income Tax (PIT) law, Installment Agreement (IA) procedures, and collection processes used by the department. The technician evaluates less complex taxpayer account information to determine if an IA should be established. The technician analyzes account information, modifies existing levies, requests account adjustments, and establishes IAs over the telephone. The technician also responds to written collection correspondence and processes information received via fax.

Essential Functions

Percentage	Description
40%	Provides customer service to taxpayers by explaining provisions of personal income tax law, IA procedures, and collection processes administered by the department. Explains the basis for taxpayer liabilities, resolves Enterprise Tax System (ETS) notice inquiries, and handles liability disputes.
20%	Reviews taxpayer accounts, initiates transactions to correct account errors, requests lien releases, and modifies or releases existing earnings withholding orders and bank levies.
15%	Reviews and responds to the less complex taxpayer correspondence on accounts from various ETS stages.
15%	Reviews ETS work lists to determine appropriate action based on established criteria and procedures. Processes information received by fax.
5%	Reviews and responds to written requests for IAs and correspondence related to the IA program. Analyzes financial statements, determines if account liability meets IA criteria, and recommends IA plans.

Marginal Functions

Percentage	Description
5%	Acts as a program resource to provide workload review, one-on-one training, or other special assignments representing the PIT Collection call center.

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Employee: I confirm that I have read and understand the described duties and functions of this position.

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Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
Classification Title Tax Technician	Position Number 564-636-7505-XXX
Working Title Collector - Early Stage Collections	Bureau and Section Business Entity Collection Bureau BE Collection Operations Section

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 supervision of the Administrator I, the Collector responds to taxpayer inquiries through Automatic Call Distribution (ACD), correspondence, FTB Secure Messaging, and Live Chat regarding Business Entity (BE) Income Tax law, Installment Agreement (IA) procedures, and the department's collection processes. The Collectors' primary responsibilities involve analyzing less complex account information, modifying existing levies, requesting account adjustments, and establishing IAs. Collectors prevent future liabilities by educating taxpayers, collecting the proper tax amount, and promoting taxpayer compliance. Collectors exercise professionalism and use good judgment to assist the customer. The incumbent is cross-training to handle internal and external customer contacts, for instance, inbound/outbound calls, chats and/or correspondence. The Collectors' duties include:

Essential Functions

Percentage	Description
45%	Provides customer service to taxpayers or representatives by explaining provisions of BE Income Tax law and collection processes (voluntary and involuntary) administered by the department. Explains the basis for taxpayer liabilities, resolves Enterprise Tax System (ETS) notice inquiries, and handles liability disputes. Interviews taxpayers to obtain asset information to secure their liability and resolve their account. Assist supervisors and leads, as needed, to ensure that processing goals are met.
30%	Ensures due process by evaluating accounting and collection system information and prior actions taken in Business Entities Tax System (BETS), Enterprise Tax System (ETS), Taxpayer Folder, and Case Management. Reviews other relevant electronic files such as Integrated Non-Filer Compliance (INC), Taxpayer Information (TI), Secretary of State (SOS), Department of Motor Vehicles (DMV), and documents such as the taxpayer's returns and financial statements. Outlines a plan of action to resolve the case and/or initiate transactions to correct account errors, request lien releases or modify/release bank levies.
20%	Thoroughly document all pertinent information obtained from contacts, actions taken, and potential next actions in the collection systems. Cases meeting rollover criteria are referred for reassignment to Compliance Representatives for additional analysis or escalated actions, which may include involuntary collection action.

Marginal Functions

Percentage	Description
5%	Acts as a program resource to provide workload review, mentor training, or other special assignments representing the BE Collection Call Center.

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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



Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
Classification Title Tax Technician	Position Number 564-648-7505-XXX
Working Title Tax Technician Out-of-State Revenue Collection Team (OSRC)	Bureau and Section Statewide Collection Bureau Public Collections, Contracts, and Support Section

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 supervision of an Administrator I, the incumbent responds to taxpayer and/or contractor telephone calls and/or correspondence on contract collection accounts. The incumbent participates in the resolution process with peers and others to identify and resolve out-of-state collection related issues.

Essential Functions

Percentage	Description
35%	Responds to Automatic Call Distribution (ACD) calls received from taxpayers or their representative related to cases identified for out-of-state collection strategies. Addresses liability disputes, filing requirements, non-resident filing requirements, assessments, residency issues, audit issues, sales of real property and military issues. Evaluates financial statements and makes determinations on taxpayer requests for installment agreements or the modification of garnishments using set criteria. Appropriately comment Taxpayer Folder (TPF).
30%	Analyzes cases identified for various out-of-state collection strategies, updates entity information, initiates legal actions, reviews and determines the validity of assessments, adjusts accounts as necessary and updates various collection systems.
10%	Responds to correspondence within Case Management (CM) related to varied questions from taxpayers and their representatives regarding the basis of the balance due and assists with various out-of-state workloads as needed. Explains computations of tax, penalties and interest to taxpayers, Power of Attorney (POA)s and other third parties to resolve lien issues.
10%	Provides ACD assistance to Federal Treasury Offset Program (FTOP) and other programs areas as needed.
10%	Reviews worklists and account history to determine appropriate action based on established criteria and procedures.

Marginal Functions

Percentage	Description
5%	Participates in one-on-one training or other special work-related assignments representing the Out-of-State Collection Program.

Signature Authorization

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Employee: I confirm that I have read and understand the described duties and functions of this position.

_____ Name (Print)	_____ Signature	_____ Date
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Supervisor: I certify that the above information accurately represents the described duties and functions of this position.

_____ Name (Print)	_____ Signature	_____ Date
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Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
Classification Title Tax Technician	Position Number 564-649-7505-XXX
Working Title Tax Technician Federal Treasury Offset Program (FTOP)	Bureau and Section Statewide Collection Bureau Public Collections, Contracts, and Support Section

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 supervision of the Administrator I, the Tax Technician receives telephone calls from an automatic call distribution (ACD) system and answers questions regarding Personal Income Tax Law, Business Entity Income Tax Law, Federal Treasury Offset Program (FTOP) procedures, Installment Agreement procedures, and Collection processes used by the Department. The technician analyzes account information, modifies existing levies, requests account adjustments, and establishes Installment Agreements over the telephone. The technician also responds to written collection correspondence while working within Case Management

Essential Functions

Percentage	Description
45%	Provides customer service to taxpayers by explaining provisions of Personal Income Tax laws, Business Entity Tax laws, FTOP requirements and procedures, Installment Agreement procedures, and Collection processes administered by the Department. Explains the basis for taxpayer liabilities, resolves FTOP notice inquiries, and handles liability disputes. Accurately comments the Taxpayer Folder.
15%	Reviews taxpayer accounts, assesses financial hardships, initiates transactions to correct account errors, requests lien releases, and modifies or releases existing earnings withholding orders and bank levies.
10%	Reviews and responds to taxpayer correspondence resulting from FTOP notices in order to bring the taxpayer into compliance either through the filing of a return or entering into an installment agreement.
20%	Reviews FTOP work lists to determine appropriate action, such as placing a FTOP hold on an account, updating the name control at the Treasury department and/or requesting the account to be withdrawn from the Treasury department, based on established criteria and procedures.
5%	Provide ACD assistance to Out of State Revenue Collection unit and other program areas as needed.

Marginal Functions

Percentage	Description
5%	May act as a resource to management for special assignments and tasks representing the program and Bureau.

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Employee: I confirm that I have read and understand the described duties and functions of this position.

Name (Print)

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Supervisor: I certify that the above information accurately represents the described duties and functions of this position.

Name (Print)

Signature

Date



Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
Classification Title Tax Technician – Permanent Full Time	Position Number 564-672-7505-XXX
Working Title Tax Technician Non-Tax Debt (NTD)	Bureau and Section Statewide Collection Bureau Public Collections, Contracts, and Support Sections

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 supervision of an Administrator I, the incumbent evaluates delinquent non-tax debt for Court-Ordered Debt Collections (COD) and Vehicle Registration Collections (VRC) as well as Dishonored Check (DC) accounts to determine appropriate resolution; answers questions and provides debtors with direction on general collection related matters of the NTD programs; adheres and applies the standard collection procedures and processes used by the department.

Essential Functions

Percentage	Description
50%	Responds to incoming telephone calls from the Automated Call Distribution (ACD) System to resolve collection accounts relating to NTD. Provides information regarding account balances and determines the appropriate method of collections needed to assist the debtor in resolving their accounts.
30%	Analyzes debtor accounts and associated collection actions and determines the need to make appropriate account adjustments such as, but not limited to, modification or release of garnishments, negotiate short-term payment arrangement based on a review of the customer's financial situation. Makes appropriate account adjustments in order to resolve the debtor's collection account. Issues, modifies or releases involuntary collection actions. Responds to written correspondence received from the debtor in order to assist the debtor in resolving their accounts.
10%	Performs other work-related duties as required including, but not limited to, fund transfers, system transactions and various manual workloads. Researches delinquent accounts to locate identifying information on the delinquent debt owed from the system-generated reports. May participate in a cross training program to learn and assist with the NTD Collections workload via the ACD system and correspondence.

Marginal Functions

Percentage	Description
5%	Serves as a program liaison with NTD external clients/partners in order to assist in account maintenance, account updates, answer account related questions and resolve debt accounts.

Percentage	Description
5%	Performs other duties as required including, but not limited to, gathering of data used in preparation of statistical reports in order to meet program goals and expectations. Act as a program resource to provide one-on-one training, or other special assignments representing NTD's contact center.



Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
Classification Title Tax Technician – Permanent Full Time	Position Number 564-674-7505-XXX
Working Title Tax Technician Non-Tax Debt (NTD)	Bureau and Section Statewide Collection Bureau Public Collections, Contracts, and Support Sections

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 supervision of an Administrator I, the incumbent evaluates delinquent non-tax debt for Court-Ordered Debt Collections (COD) and Vehicle Registration Collections (VRC) as well as Dishonored Check (DC) accounts to determine appropriate resolution; answers questions and provides debtors with direction on general collection related matters of the NTD programs; adheres and applies the standard collection procedures and processes used by the department.

Essential Functions

Percentage	Description
50%	Responds to incoming telephone calls from the Automated Call Distribution (ACD) System to resolve collection accounts relating to NTD. Provides information regarding account balances and determines the appropriate method of collections needed to assist the debtor in resolving their accounts.
30%	Analyzes debtor accounts and associated collection actions and determines the need to make appropriate account adjustments such as, but not limited to, modification or release of garnishments, negotiate short-term payment arrangement based on a review of the customer's financial situation. Makes appropriate account adjustments in order to resolve the debtor's collection account. Issues, modifies or releases involuntary collection actions. Responds to written correspondence received from the debtor in order to assist the debtor in resolving their accounts.
10%	Performs other work-related duties as required including, but not limited to, fund transfers, system transactions and various manual workloads. Researches delinquent accounts to locate identifying information on the delinquent debt owed from the system-generated reports. May participate in a cross training program to learn and assist with the NTD Collections workload via the ACD system and correspondence.

Marginal Functions

Percentage	Description
5%	Serves as a program liaison with NTD external clients/partners in order to assist in account maintenance, account updates, answer account related questions and resolve debt accounts.



Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
Classification Title Tax Technician – Permanent Full Time	Position Number 564-675-7505-XXX
Working Title Tax Technician Interagency Intercept Collection Program (IIC)	Bureau and Section Statewide Collection Bureau Public Collections, Contracts, and Support Section

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General Statement

Under the general direction of the Administrator I, and the technical direction of a lead person, you are responsible for performing a variety of duties regarding the interception of Personal Income Tax (PIT) refunds, lottery winnings and unclaimed property claims to repay debts owed to other state agencies, county, educational institutions, cities and IRS. Provide excellent customer service when answering calls from debtors. Act as a liaison for various sections within the department.

Essential Functions

Percentage	Description
50%	Provide excellent customer service when answering ACD calls from debtors by immediately responding to questions regarding the intercept program. In addition, you will provide information to debtors inquiring about offsets of Personal Income Tax refunds (PIT), lottery winnings and unclaimed property claims such as the requesting agency name and contact information and amount of offset. May require researching the lottery winnings and unclaimed property reports to identify the payment. Refer debtors to appropriate agency as needed. Perform TI transactions and request manual refunds as needed. Appropriately comment applicable systems (i.e. TI, Taxpayer Folder, etc.). Identify program issues and communicate to Management. Notify Management of calls that are sensitive or will potentially escalate.
20%	Manual workloads such as reviewing and processing manual Bank and Corporation intercept requests received from California Department of Tax and Fee Administration (CDTFA) and Employment Development Department (EDD). You respond to phone requests regarding PIT offset information from CDTFA and EDD. You complete these tasks by analyzing both PIT and BE accounts.
15%	Review and respond to debtor correspondence resulting from IIC notices through Case Management.
10%	Provide back-up assistance for various workloads to include: process modification requests and, prepare requests either for manual process or through nightly TI batch, prepare and mail weekly and monthly reports to participating agencies, reproduce weekly summary reports using microfiche and provide to agencies, or gather statistical program data.

Marginal Functions

Percentage	Description
5%	You may act as a resource to management for special assignments and tasks representing the program and Bureau.

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