



Proposed

HR Date:

HR Initials:

Duty Statement

Request for Personnel Action (RPA) Number 2627-00065	Effective Date
Classification Title Information Technology Associate	Position Number 564-290-1401-004
Working Title SDT Systems and Account Management Associate	Bureau and Section Operations Management Bureau Secure Data Capture & Technology Tools 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 Information Technology Supervisor II in the Secure Data Capture & Technology Tools Section (SDCTT) and technical direction of the Paper Data Capture Operations (PDCOPS) Lead and Architect, the Information Technology Associate will perform under a variety of recurring, well-defined tasks requiring occasional innovative problem-solving to support unit services, processes, and defined procedures. The Secure Data Transfer (SDT) Team is responsible for the development and administration of the SDT services SWIFT and IDTS. The team also provides analytical and technical assistance to internal and external users, as well as to other technical teams; and is a technical resource for management and staff in areas related to the third party software package and service. The SDT service is a 24x7x365 platinum service. The Information Technology Associate provides services which encompass the System Engineering domain. All duties are performed within the framework of the department's mission and values and in line with the department's policies and general procedures. The incumbent will work in an office environment. There is no travel involved, other than necessary for training opportunities. The Secure Data Capture & Technical Tools Section provides 24x7 enterprise support to both internal and external systems. This position may require occasional off hours support; you must be flexible to adapt to changing priorities and able to occasionally adjust work schedules to meet operational needs.

Essential Functions

Percentage	Description
50%	Perform daily operations tasks such as system monitoring, service restarts, and manual processing to ensure system availability and continuous internal and external file transfers. Perform incident management tasks, which entail working with end users, vendors, and other technical teams, to triage file transfer incidents and develop quick solutions using enterprise tools and processes. Perform in-depth analysis to identify major incidents and problems, and document known facts using enterprise change management tools. Perform system administration tasks in support of IDTS and SWIFT using the third party Secure Transport software and a comprehensive set of tools. The tasks include starting and stopping of services, password maintenance for service accounts, monitoring of system alerts, and monitoring and maintenance of other custom in-house developed applications. Analyze and fulfill requests related to account management, which includes the creation of new accounts, modification of existing accounts, and modification of system configurations using the third party software Secure Transport, custom in-house developed tools, and other standard enterprise tools such as CA Service Desk and Active Directory. Draft and send out communication to users, technical teams, other FTB system administrators, Level 3, and management to relay pertinent operations and processing information.
20%	Coordinate and participate in meetings with business and technical teams to manage major incidents, problems, and maintenance activities, which include performing impact analysis, determining communication needs, and determining resolution activities using established tools and processes.



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	Participate in enterprise teams and meetings to assist with information technology related events and activities, such as Crawl Walk Run efforts, quarterly releases, and Annual Changes. Act as a technical representative for the team on information technology studies and projects. Assist in reviewing business and technical requirements that support defect solutions and system enhancements. Maintain system administration processes, documentation, and user manuals using tools such as the Microsoft Office Tools suite, Adobe Acrobat, and SharePoint to facilitate training, knowledge transfer, and information sharing with team members and internal/external customers. Provide adhoc reports to communicate metrics, incident and problem status, and other system information using systems logs and other reporting tools.
25%	Perform duties to fulfill Operations Management Bureau (OMB) mission, goals, and objectives, including: Understand, participate, and adhere to FTB's policies for Software Development Life Cycle (SDLC) and Information Technology Infrastructure Library (ITIL) based service management processes to ensure best practices are followed. Analyze, develop, and implement standardized operational processes or automation of services to achieve continual service improvement for the enterprise. This includes documenting new or modified processes using established bureau knowledge management tools. Leverage technical documentation to lead or participate in the research of new technology products in order to resolve ongoing problems, modernize technology, or introduce new services to our program. In addition, you appropriately share this information using OMB's established knowledge management tools, during team meetings, and while conducting on the job training with other staff members. Take part in job related training, both formal and informal, to remain current in supported technologies and unit workloads and share this knowledge with others within the unit. Participate in team and section meetings, and bureau forums to remain informed on emerging organizational plans or initiatives. Provide clear written and verbal communication of service outages, projects, and operational issues using OMB's established communication tools and processes. Work with systems administrators and architects to conduct in-depth application testing of the SWIFT and IDTS applications in support of maintenance and operations activities. The tasks include development of test scripts, updating of test scripts as new functionality is implemented and complete documentation of all test results and findings.

Marginal Functions

Percentage	Description
5%	Perform other administrative and technical functions as required to support the enterprise. Represent the Section on various committees and teams to achieve completion of enterprise initiatives and goals.

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.

VACANT

Name (Print)

Signature

Date

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

Weatherford, Lisa@FTB



Duty Statement

Name (Print)

Signature

Date