



Duty Statement

Request for Personnel Action (RPA) Number 2627-00241/40/39/38	Effective Date
Classification Title Tax Program Technician I	Position Number 564-877/832-9587-XXX
Working Title Production Unit Technician	Bureau and Section Processing Services Bureau / Information Validation 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 a Tax Program Supervisor, the incumbent performs a variety of entry and full journey level functions necessary to accurately process Personal Income Tax (PIT) and/or Business Entity (BE) tax returns, payments, and general correspondence. The job duties are performed in a processing environment across Business Entities and Information Validation Section. The incumbent will correspond with taxpayers via letters and/or telephone regarding additional information necessary to process tax returns and/or payments. The incumbent may be rotated or loaned among the two Sections, as workload priorities shift.

Essential Functions

Percentage	Description
60%	Examine and process income tax returns using FTB systems and applications. Perform necessary adjustments or corrections to taxpayer accounts, in order to post returns/payments. Correspond with internal and external customers through letters and/or telephone to expedite processing. Determine and take appropriate action to refer correspondence/returns/payments/calls to other sections/bureaus/divisions. Validate and/or review all necessary tax forms to ensure accurate processing of income tax returns. Apply all applicable policies and procedures when processing correspondence, returns, and payments.
30%	Resolve technical questions and ensure procedures are followed. Provide input for updating procedure manuals and assist with the development of procedures for implementation of new workloads. Review work to ensure quality and communicate any issues/findings with Supervisor.

Marginal Functions

Percentage	Description
10%	Attend meetings and or coordinate with other units/sections to provide updates on workloads, policies and procedures. Act as a technical expert for trouble shooting and annual changes. Assist with the formal training of new staff, including on the job and coordinate training schedules.

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