



STATE OF CALIFORNIA
Franchise Tax Board

Proposed

HR Date: 8/18/2026

HR Initials: tk

Duty Statement

Request for Personnel Action (RPA) Number 2627-00337	Effective Date
Classification Title Tax Technician	Position Number 564-348-7505-093
Working Title Tax Technician	Bureau and Section IPTE/Federal/State & Special Audit 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 and the guidance of a technical lead, the incumbent's primary responsibilities consist of performing technical examinations based on information received from the Internal Revenue Service (IRS) and California returns. In addition, the incumbent will resolve correspondence related to these examinations.

The Federal/State & Special Audit Section (FSSAS) consists of two specialized workgroups, Assessment and Resolution. The incumbent is expected to learn and rotate between both workloads based on operational needs and maintain the expected level of productivity and accuracy. In a fast paced and demanding production environment, the incumbent performs the following duties:

Essential Functions

Percentage	Description
50%	Analyze and process assessment and resolution workloads to issue a Notice of Proposed Assessment (NPA) or to resolve correspondence. Based on information received from the Internal Revenue Service (IRS), examinations are performed on California returns and/or data to determine applicable state adjustments. Access, retrieve, and analyze technical information about pertinent tax laws, policies and procedures governing the work using a variety of systems and resources including but not limited to: Taxpayer Folder (TPF) Case Management (CM) Taxpayer Information (TI) Business Entities Tax System (BETS)
40%	Interpret, apply, and communicate technical information on examinations to taxpayers and/or representatives by telephone and/or writing while performing quality customer experience. This includes following department writing standards and providing explanations of tax law, notices, billings, and IRS adjustments. Ensure timely follow up with taxpayers and/or representatives in accordance with established audit policies and procedures. Maintain assigned inventory within the established timeframes and statute of limitations. Assist lead with peer technical review.

Marginal Functions

Percentage	Description
10%	Attend training and staff meetings to enhance job skills and knowledge. Provide on the job training (OJT) and answer questions about workloads and procedures as needed. Participate in technical projects and/or assignments. Assist other areas within the enterprise to meet operational goals as needed. Participate in temporary assignments such as legislatively mandated workloads.

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