



Duty Statement

Request for Personnel Action (RPA) Number 2627-00254	Effective Date
Classification Title Student Assistant	Position Number 564-948-4870-990
Working Title Student Assistant – Out-of-State Collections	Bureau and Section Statewide Collection Bureau Public Collections, Contracts, and Support Section (PCCSS)

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 close supervision of the Administrator I of the Interstate Collection Unit, the student assistant will perform a variety of duties in support of the Out of State Revenue Collection team (OSRC) to achieve the bureau's collection and customer service goals.

Essential Functions

Percentage	Description
55%	Assist the Out of State Revenue Collection team with maintaining inventory, such as pulling in new accounts, routing out old accounts in MP/DS48 ARCS states, assigning accounts to proactive collectors, process returned mail and update payer responses, help maintain the Unassigned correspondence inventory by sorting, assigning and distributing. Contact banks and employers for status on payer responses and advise the assigned collector.
15%	Send out Certified 4902s for OSRC agents and send out any notices that need to be printed out in the office.
20%	Provide support and assistance on various bureau projects related to increasing efficiencies of the collection process. Cross train on other workloads within the unit for personal training, and development. Assist other team members as needed, performing diverse duties in an effort to ensure timely processing of workloads.

Marginal Functions

Percentage	Description
10%	Provide assistance to Federal Treasury Offset Program (FTOP) program areas as needed.

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



Duty Statement

Request for Personnel Action (RPA) Number 2627-00288	Effective Date
Classification Title Student Assistant	Position Number 564-942-4870-99
Working Title Student Assistant	Bureau and Section Statewide Collection Bureau/Account Recovery and Resolution Team

Our mission is to help taxpayers file timely and accurate tax returns and pay the correct amount to fund services important to Californians. In order to support this mission, FTB employees strive to develop in CalHR's Core Competencies: Collaboration, Communication, Customer Engagement, Digital Fluency, Fostering Diversity, 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

The Student Assistant classification is intended to provide students with the necessary work experience to enhance their education and succeed in a business environment after graduation. Under the close supervision of an Administrator I in the Account Recovery and Resolution Team (ARRT), the incumbent will perform a variety of duties in support of ARRT.

Essential Functions

Percentage	Description
40%	Helps maintain the Unassigned Correspondence (UAC) inventory by sorting, assigning, and distributing based on case complexity. Contacts external customers to request necessary documentation to resolve cases.
25%	Cross trains on other workloads within the unit for personal training and development. Assists other team members as needed, performing diverse duties in an effort to ensure timely processing of workloads.
15%	Support the Account Recovery and Resolution Team (ARRT) Program by answering the rollover line and notifying the appropriate staff person of the taxpayer callback request. Maintain and organize supply areas for Tax Account Resolution Section (TARS).
15%	Assists ARRT staff by faxing documentation to taxpayers and employers. Enters appropriate comments on applicable systems, update addresses and payer transactions on the accounting and collection systems.

Marginal Functions

Percentage	Description
5%	Assists in special projects related to the operation of the ARRT Section, including but not limited to, creation of databases and analysis of program statistics or the analysis of current procedures.

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.

_____ 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 2627-00253	Effective Date
Classification Title Student Assistant	Position Number 564-974-4870-990
Working Title Student Assistant	Bureau and Section Bureau Account Support Team (BAST)/PCCSS Section/Statewide Collection Bureau

Our mission is to help taxpayers file timely and accurate tax returns, and pay the correct amount to fund services important to Californians. In order 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 close supervision of the Administrator 1 and/or unit lead of the Bureau Account Support Team, the student assistant will perform a variety of duties in support of the Non-Tax Debt (NTD) and Tax programs within the Statewide Collection Bureau (SCB): Court Ordered Debt (COD), Vehicle Registration Collections (VRC), Interagency Intercept Collections (IIC), Federal Offset Program (FTOP), State Offset Program (SOP), Out-of-State Revenue Collection (OSRC), Account Recovery and Resolution Team (ARRT) and PIT Manual Process (MP).

Specific duties are described below:

Essential Functions

Percentage	Description
65%	Support the NTD programs by sorting incoming mail and utilizing procedures and systems to take appropriate actions to process correspondence. Update NTD collection accounts with social security numbers and addresses by following the unit's procedures and evaluating information from various sources such as LexisNexis, DMV, Taxpayer Folder, and other systems. Complete time-sensitive workloads such as information received from faxes, Potentially Incorrect Debtors (PIDS), and levy releases with the appropriate time frame provided by leads and supervisor.
20%	Support tax collection programs such as IIC, FTOP, SOP, OSRC, ARRT and PIT MP by sorting incoming and processing outgoing mail, reviewing work lists and identify opportunities to offset refunds from other partnering state agencies.
10%	Provide support and assistance on various bureau projects related to the increasing efficiencies of the collection process or addressing short term bureau wide issues on a temporary basis.

Marginal Functions

Percentage	Description
5%	Perform other support duties as needed.

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