



STATE OF CALIFORNIA
Franchise Tax Board

Current or Proposed

Proposed

Date Approved

08/18/2026

HR Initials

KH

DUTY STATEMENT

Request for Personnel Action (RPA) Number ERPA-2627-00051	Effective Date 10/01/2026
Classification Title Tax Technician, FTB	Position Number 564-655-7505-001
Working Title Tax Technician - Field	Bureau and Section Field & Complex Account Collection Bureau 621 Assistant Director Field Operations

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 Public Service Supervisor, the Tax Technician performs paraprofessional tasks of tax and nontax law, regulation, and policy enforcement at the Franchise Tax Board; and does other related work. The incumbent will use the knowledge of all phases of debt collection and tax compliance to proactively perform all aspects of compliance work to resolve accounts and educate taxpayers to prevent future tax liabilities and non-compliance.

Essential Functions

Percentage	Description

60%	Public Counter functions communicate with personal and business tax taxpayers directly in person to advise and explain various provisions of laws and regulations administered by the Department, resolve collection notice problems, handle liability disputes, initiate transactions to correct account errors and modify or release accounts, explain the basis for the liabilities, identify, analyze, and release liens, analyze financial statements and recommend payment arrangement plans. Issue assessments for missing years and recommend discharge from accountability. Provide Business Entity revivor requirements and process requests that meet requirements.
30%	Utilizes collection skills and tools to efficiently and effectively resolve less complex or sensitive collection accounts. Ensures due process has been provided and all attempts to resolve case voluntarily have been made prior to invoking involuntary collection actions. Analyzes and reviews cases and financial information to determine appropriate collection actions. Contacts delinquent taxpayers via telephone, skip tracing, correspondence, and third-party contacts to request payment in full, explain assessments and gain compliance to resolve collections cases. Provides education to taxpayers and businesses in order to gain future compliance. Responsible for maintaining and monitoring collection caseload on a daily basis for follow up and to ensure that commitments are met by taxpayers, businesses and/or their representatives and initiates appropriate collection action.

Marginal Functions

Percentage	Description
10%	Additional work related duties may include cashiering, mail processing, answering telephones, organizing/ordering forms, training new employees and providing administrative support.

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