



Duty Statement

Request for Personnel Action (RPA) Number 2627-00395 & 2627-00396	Effective Date
Classification Title PI Tax Technician	Position Number 564-825-7505-990
Working Title Agent Operations	Bureau and Section Filing Services Bureau (FSB)/ Taxpayer Services Center Section (TSCS)

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 Customer Service Supervisor in Taxpayer Services Center Section, in a contact center, the incumbent will professionally receive and respond to phone and/or written inquiries (live chat, & correspondence from customers and their representatives). These inquiries include requests for information pertaining to all programs administered by the Franchise Tax Board. In addition, receive requests for information regarding programs administered by other state departments and taxing agencies. When dealing with the public, exercise professionalism and good judgment to assist the customer in identifying the exact nature of the issue that prompted the contact and explain pertinent legal provisions, regulations, and related administrative practices.

Essential Functions

Percentage	Description
40%	Responds to phone and/or written inquiries in a clear, professional, and timely manner by telephone and/or by preparing a written response through correspondence and/or Live Chat. Analyzes the less complex taxpayer information to assist the customer in determining filing requirements; which form(s) are appropriate for the taxpayer to file; resolves revenue resolution problems and issues resulting from Audit, Collections, and Filing Program activities; explain the reason(s) for tax liabilities; abates tax and issues refunds; assesses tax as required; prepares complex account resolution transactions; explains application of law related to penalties and interest; and reconstructs accounts to determine the correct outcome of adjustments. Follows the Department's policy for Privacy and Disclosure at all times to ensure the protection of taxpayer information.
35%	Provides immediate information regarding taxpayer rights, privileges, and obligations under the Personal Income Tax (PIT) and Business Entities (BE) tax laws. Provides and explains new services available through the FTB website. Explains all payment arrangement options, including informal 90-day payment arrangements, formal installment agreements, and hardship procedures involving Earnings Withholding Orders for Taxes (EWOTs) and Orders to Withhold (OTWs). Releases EWOTs and OTWs or modify them to reflect a revised amount due when procedures permit. Explains and follows through with Western Union Quick Collect payment procedures and determine if the taxpayer has received due process during billing cycles. Explains the lien process and resolve liens issued in error. Answers general questions regarding FTB special programs. Performs the transactions necessary to correct accounts. Cancels tax, penalties, and interest that resulted from erroneous adjustments or billings.

Marginal Functions

Percentage	Description
15%	Participates in special projects and other short-term workloads. Provides assistance or act as a resource for other tax technician for the purposes of pursuing job shadowing or career development opportunities. Provides information regarding programs administered by other state departments and taxing agencies

Marginal Functions

Percentage	Description
5%	Attends meetings and FTB events as required. May participates in departmental focus groups to improve customer service; assists with special projects assigned to the section; and conducts customer surveys
5%	May be assigned other duties, acting as a resource to management and staff for special assignments and tasks, such as assisting with training, mentoring, and other special assignments representing the contact center.

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
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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 2627-00423 & 2627-00424	Effective Date
Classification Title PI Tax Technician	Position Number 564-828-7505-990
Working Title Agent Operations	Bureau and Section Filing Services Bureau (FSB) / Correspondence, Analysis, Support, and Education Section (CASES)

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 Customer Service Supervisor in Correspondence, Analysis, Support, and Education Section, in a contact center, the incumbent will professionally receive and respond to phone and/or written inquiries (live chat, & correspondence which may include Power of Attorney (POA) declarations from customers, and their representatives). These inquiries include requests for information pertaining to all programs administered by the Franchise Tax Board. In addition, receive requests for information regarding programs administered by other state departments and taxing agencies. When dealing with the public, exercise professionalism and good judgment to assist the customer in identifying the exact nature of the issue that prompted the contact and explain pertinent legal provisions, regulations, and related administrative practices.

Essential Functions

Percentage	Description
40%	Respond to phone and/or written inquiries in a clear, professional, and timely manner by telephone and/or by preparing a written response through correspondence (which may include POA) and/or Live Chat. Analyze the less complex taxpayer information to assist the customer in determining filing requirements; which form(s) are appropriate for the taxpayer to file; resolve revenue resolution problems and issues resulting from Audit, Collections, and Filing Program activities; explain the reason(s) for tax liabilities; abate tax and issue refunds; assess tax and make adjustments to accounts or process Power of Attorney Declarations as required; prepare complex account resolution transactions; explain application of law related to penalties and interest; and reconstruct accounts to determine the correct outcome of adjustments. Follow the Department's policy for Privacy and Disclosure at all times to ensure the protection of taxpayer information.
35%	Provide immediate information regarding taxpayer rights, privileges, and obligations under the Personal Income Tax (PIT) and Business Entities (BE) tax laws. Provide and explain new services available through the FTB website. Explain all payment arrangement options, including informal 90-day payment arrangements, formal installment agreements, and hardship procedures involving Earnings Withholding Orders for Taxes (EWOTs) and Orders to Withhold (OTWs). Release EWOTs and OTWs or modify them to reflect a revised amount due when procedures permit. Explain and follow through with Western Union Quick Collect payment procedures and determine if the taxpayer has received due process during billing cycles. Explain the lien process and resolve liens issued in error. Answer general questions regarding FTB special programs. Perform the transactions necessary to correct accounts. Cancel tax, penalties, and interest that resulted from erroneous adjustments or billings. May approve or reject POA declarations and inform of results or request more information as required.

Percentage	Description
15%	Participate in special projects and other short-term workloads. Provide assistance or act as a resource for other tax technicians for the purposes of pursuing job shadowing or career development opportunities. Provide information regarding programs administered by other state departments and taxing agencies, such as the Board of Equalization, the Employment Development Department, the Secretary of State, the State Controller's Office, and the Internal Revenue Service.

Marginal Functions

Percentage	Description
5%	Attend meetings and FTB events as required. May participate in departmental focus groups to improve customer service; assist with special projects assigned to the section; and conduct customer surveys.
5%	May be assigned other duties, acting as a resource to management and staff for special assignments and tasks, such as assisting with training, mentoring, and other special assignments representing the contact center.

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 2627-00415 & 2627-00416	Effective Date
Classification Title Tax Technician	Position Number 564-868-7505-990
Working Title Tax Technician	Bureau and Section Filing Compliance 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, 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

Under the general supervision of an Administrator I, in the Filing Compliance Bureau (FCB), the incumbent is part of one of the FCB contact centers. The incumbent will provide customer service to taxpayers or their representatives using correspondence and the telephone. In addition, the incumbent will work assignments in the Enterprise Tax System (ETS) and FTB legacy systems. Each incumbent will perform according to their general work expectations. The incumbent may be shifted to various workloads throughout Filing Division to help meet the division goals and customer service levels.

Essential Functions

Percentage	Description
30%	Provides customer service to taxpayers or their representatives by answering and initiating phone calls, sending and receiving correspondence, providing guidance in accordance with applicable procedures and guidelines, Explaining applicable compliance requirements and tax law. Make appropriate determination to assist taxpayers or their representatives in resolving their account. Request additional information when needed to complete appropriate determination.
30%	Analyze and resolve accounts using the ETS (Return Analysis, Taxpayer Folder (TPF), Case Management (CM)) and Legacy systems (Taxpayer Information System (TI), Business Entity Tax System (BETS) Accounts Receivable Collections System (ARCS), Integrated Nonfiler Compliance System (INC), Withhold At Source System (WASS), Department of Motor Vehicles (DMV) and Lexis Nexis) Ensure taxpayers file and pay the correct amount of tax by reviewing and understanding data from multiple sources, verifying account data is accurate and reflecting an appropriate administration of the tax law. Perform system transactions and/or account adjustments when necessary. Actively protect the privacy and security of data entrusted to the FTB.
30%	Complete assignments in ETS by using "Get Most Urgent" and in Legacy Systems using worklist. Use the appropriate procedures and guidelines to complete assignments timely and accurately.

Marginal Functions

Percentage	Description
10%	Participate on teams and or special projects. Actively contribute to the team/project goals. Communicate progress to supervisor.

Signature Authorization

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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 2627-00413 & 2627-00414	Effective Date
Classification Title Tax Technician	Position Number 564-897-7505-990
Working Title Tax Technician	Bureau and Section Filing Compliance 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, 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

Under the general supervision of an Administrator I, in the Filing Compliance Bureau (FCB), the incumbent is part of one of the FCB contact centers. The incumbent will provide customer service to taxpayers or their representatives using correspondence and the telephone. In addition, the incumbent will work assignments in the Enterprise Tax System (ETS) and FTB legacy systems. Each incumbent will perform according to their general work expectations. The incumbent may be shifted to various workloads throughout Filing Division to help meet the division goals and customer service levels.

Essential Functions

Percentage	Description
30%	Provides customer service to taxpayers or their representatives by answering and initiating phone calls, sending and receiving correspondence, providing guidance in accordance with applicable procedures and guidelines, Explaining applicable compliance requirements and tax law. Make appropriate determination to assist taxpayers or their representatives in resolving their account. Request additional information when needed to complete appropriate determination.
30%	Analyze and resolve accounts using the ETS (Return Analysis, Taxpayer Folder (TPF), Case Management (CM)) and Legacy systems (Taxpayer Information System (TI), Business Entity Tax System (BETS) Accounts Receivable Collections System (ARCS), Integrated Nonfiler Compliance System (INC), Withhold At Source System (WASS), Department of Motor Vehicles (DMV) and Lexis Nexis) Ensure taxpayers file and pay the correct amount of tax by reviewing and understanding data from multiple sources, verifying account data is accurate and reflecting an appropriate administration of the tax law. Perform system transactions and/or account adjustments when necessary. Actively protect the privacy and security of data entrusted to the FTB.
30%	Complete assignments in ETS by using "Get Most Urgent" and in Legacy Systems using worklist. Use the appropriate procedures and guidelines to complete assignments timely and accurately.

Marginal Functions

Percentage	Description
10%	Participate on teams and or special projects. Actively contribute to the team/project goals. Communicate progress to supervisor.

Signature Authorization

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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 2627-00417 & 2627-00418	Effective Date
Classification Title Tax Technician	Position Number 564-869-7505-990
Working Title Tax Technician	Bureau and Section Filing Compliance Bureau

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General Statement

Under the general supervision of an Administrator I, in the Filing Compliance Bureau (FCB), the incumbent is part of one of the FCB contact centers. The incumbent will provide customer service to taxpayers or their representatives using correspondence and the telephone. In addition, the incumbent will work assignments in the Enterprise Tax System (ETS) and FTB legacy systems. Each incumbent will perform according to their general work expectations. The incumbent may be shifted to various workloads throughout Filing Division to help meet the division goals and customer service levels.

Essential Functions

Percentage	Description
30%	Provides customer service to taxpayers or their representatives by answering and initiating phone calls, sending and receiving correspondence, providing guidance in accordance with applicable procedures and guidelines, Explaining applicable compliance requirements and tax law. Make appropriate determination to assist taxpayers or their representatives in resolving their account. Request additional information when needed to complete appropriate determination.
30%	Analyze and resolve accounts using the ETS (Return Analysis, Taxpayer Folder (TPF), Case Management (CM)) and Legacy systems (Taxpayer Information System (TI), Business Entity Tax System (BETS) Accounts Receivable Collections System (ARCS), Integrated Nonfiler Compliance System (INC), Withhold At Source System (WASS), Department of Motor Vehicles (DMV) and Lexis Nexis) Ensure taxpayers file and pay the correct amount of tax by reviewing and understanding data from multiple sources, verifying account data is accurate and reflecting an appropriate administration of the tax law. Perform system transactions and/or account adjustments when necessary. Actively protect the privacy and security of data entrusted to the FTB.
30%	Complete assignments in ETS by using "Get Most Urgent" and in Legacy Systems using worklist. Use the appropriate procedures and guidelines to complete assignments timely and accurately.

Marginal Functions

Percentage	Description
10%	Participate on teams and or special projects. Actively contribute to the team/project goals. Communicate progress to supervisor.

Signature Authorization

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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