



STATE OF CALIFORNIA
Franchise Tax Board

Current or Proposed

Proposed

Date Approved

08/26/2026

HR Initials

AD

DUTY STATEMENT

Request for Personnel Action (RPA) Number ERPA-2627-00068	Effective Date 11/01/2026
Classification Title Senior Compliance Representative, FTB	Position Number 564-767-8620-004
Working Title Senior Compliance Representative	Bureau and Section Filing Compliance Bureau Withholding Services and Compliance 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 the Administrator I, in the Withholding Services & Compliance Section, the incumbent performs as a lead person at the advanced journey level for the more complex tasks supporting the withholding program consistent with the policies and procedures established for the program. You work as a team leader and review transactions of all staff and resolve complex compliance issues. Participates as a team member with peers and others to identify and resolve work-related issues, consistent with the department's mission and values.

You are responsible for guiding the resolution and collection of the more sensitive and complex activities necessary to assist nonresident taxpayers, withholding agents, independent contractors, partnerships, and corporations. You set an example for fellow employees by being courteous and professional to internal and external customers. You explain pertinent legal provisions, regulations, and related administrative practices and their

applications to specific cases. You are expected to maintain good attendance and demonstrate efficient and effective work habits, including time utilization.

Essential Functions

Percentage	Description
45%	Independently performs complex activities such as providing technical support, guidance and direction to all team members in the unit to resolve complex technical issues as well as providing appropriate leadership to be consistent with the department's public service objectives. Reviews and assigns the work of others and ensure accuracy and consistency with procedures, directives, and policies. Researches and provides individual training to all team members and provides immediate feedback to the supervisor or team members regarding any pertinent performance information. Reviews the more complex written work and account transactions of the Compliance Representative (CR), Tax Technician (TT), and Tax Program Technician I (TPT I) staff for accuracy. Identifies training deficiencies and provides one-on-one training with new and veteran employees. Evaluates and recommends actions and/or procedures to improve the quality and quantity of work performed.
20%	Participates and resolves the more complex and sensitive issues, such as laws that pertain to withholding requirements, discovery, and collections. Assists other business areas throughout the department in resolving complex nonresident or Real Estate withholding. Identifies and reports system or procedural problems and suggests appropriate improvements or alternatives to resolve those problems to the System Analysis and Support team in Withholding Services & Compliance Section (WSCS).
15%	Works as a liaison between WSCS and other sections in the department to improve the work processes. Represents WSCS on unit/section/divisional teams and projects to establish policy in accordance with tax laws and implement procedures pertaining to withholding matters.
10%	Reviews, develops, and maintains reference guide materials, procedures, manuals, forms and publications to support the department's public service objectives. Creates training guides all for staff and update procedures that will enhance the staff's job knowledge to improve the quality of service provided to WSCS customers including the CR Lead.

Marginal Functions

