



## DUTY STATEMENT

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|-------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|
| <b>Request for Personnel Action (RPA) Number</b><br>ERPA-2627-00062           | <b>Effective Date</b><br>10/01/2026                                                      |
| <b>Classification Title</b><br>Administrator IV, FTB                          | <b>Position Number</b><br>564-728-4346-xxx                                               |
| <b>Working Title</b><br>Assistant Director, FSB (Taxpayer Services & Support) | <b>Bureau and Section</b><br>Filing Services Bureau<br><br>Taxpayer Services and Support |

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 direction of the Director of the Filing Services Bureau, the incumbent will assist in the management of the Filing Services Bureau (FSB) which is comprised of the Taxpayer Services Center and Correspondence, Analysis, Support and Education sections. The FSB is organizationally setup as the first point of contact for all taxpayers and their representatives to ensure California's taxpayers file timely and pay accurately; providing first-class customer service in tax filing assistance and account resolution via centralized toll and toll-free telephone assistance, correspondence (physical mail, Email, Internet and Fax) and Live Chat regarding Personal Income Tax, Business Entity and other programs FSB is also responsible for providing education and outreach, audit, technical, analytical, educational and contact center support to all bureau staff, other departmental staff and external customers.

Typical Duties: The Assistant Director of this bureau will act in an advisory capacity to the department's Executive Officer, Governance Council and Division Chiefs making recommendations on policies, strategies and procedures related to improving and expanding the filing services provided to our internal and external customers; such as, expanding self-service options, Business Process Management (BPM) improvements, Contact Center Platform strategies, and improving one-and-done service, including assisting the department's voluntary and involuntary compliance efforts; and playing a key role in the implementation and ongoing efforts for the department's Enterprise Data to Revenue (EDR) project and Tax Systems Modernization.

## Essential Functions

| Percentage | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 40%        | Assists the departmental leadership in planning, developing, and managing the policies, strategic direction and business practices for the department's filing services functions; develops, recommends and implements policies, procedures and plans for improving self-service options, one-and-done customer service, business process improvements and contact center strategies for the department's customer contacts; evaluates the effectiveness of the filing services activities; develops integrated and comprehensive solutions for improving customer services to our internal and external customers; participates on departmental teams and committees which are charged with development and implementation of contact center platform strategies, BPM improvements, tax systems modernizations and expansion of self service options; develops and facilitates the future vision and strategic direction as it relates to the department's filing services through the implementation of the EDR project, for example, external taxpayer folder and electronic correspondence; and represents the Filing Program on issues related to filing services functions. All policy options and strategic direction recommendations are enterprise wide and cross-functional. |
| 40%        | Directs the activities of the Correspondence, Analysis, Support and Education (CASES)Section. Responsibility includes, but is not limited to, the Correspondence and Audit Unit and the Multi-Contact and Resolution Unit providing external customer service in the form of correspondence, live chat and phone contacts, and outreach efforts to targeted groups of taxpayers and tax professionals including the Voluntary Income Tax Assistance (VITA) program. Also responsible for all Filing Services Bureau contact center support activities consistent with contact center best practices for IVR, WFM, tools and reports, including the development and maintenance of the enterprise key public contact resources; the RACK for all policies and procedures. In addition, responsible for the education and outreach public service activities, technical support programs, analytical activities, and bureau support. Also included in these activities is the research, analysis, development and implementation of new methods for improving filing services, such as the changes required to EDR and overall compliance with the tax laws.                                                                                                                             |
| 15%        | Directs the transition of the major operational and policy changes with the implementation of the EDR project, BPM improvements, and contact center platform strategies. These changes include enterprise-wide efforts and collaborative relationships with internal and external partners and stakeholders. Included in these activities is the planning and scheduling of telephone lines and equipment to maximize the services obtainable for the multi-million dollar OE&E appropriation for toll-free customer service. May work directly with the telephone company officials and other vendors to resolve engineering and service problems. Serves as a departmental expert on advanced multi-channel contact center standards, technologies, and systems. Directs the preparation of the sections' operational and resource plans and the annual budget for the bureau.                                                                                                                                                                                                                                                                                                                                                                                                       |

## Marginal Functions

| Percentage | Description                                                                                         |
|------------|-----------------------------------------------------------------------------------------------------|
| 5%         | Acts as backup to the Director of the Filing Services Bureau and performs other duties as required. |

**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