



Duty Statement

Request for Personnel Action (RPA) Number RPA 2627-00296	Effective Date
Classification Title Student Assistant	Position Number 564-922-4870-990
Working Title Special Programs Bureau Student Assistant	Bureau and Section Special Programs Bureau, Specialized Collection 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 close supervision of the Business Transfers (BT) and Strike Team (ST) supervisor, the incumbent is responsible for general clerical duties, tasks, and assignments associated with a wide variety of programs and services administered by and in support of the Special Programs Bureau (SPB), including Offer in Compromise (OIC), Decedent (DEC), BT, Bankruptcy (BK), Lien, Innocent Spouse (ISP), and Frivolous Activity Non-Filer (FAN) Programs.

Essential Functions

Percentage	Description
65%	Supports tax collection programs within Special Programs Bureau (SPB) by sorting incoming mail and assigning cases in the Enterprises Tax System (ETS) as appropriate. Utilizes program procedures and multiple systems to process or route incoming correspondence. Reviews incoming correspondence/applications for completeness. Researches, analyzes, and routes correspondence within ETS. Assists with time sensitive reports to identify accounts with balances for possible collections.
30%	Provides basic support activities to SPB programs such as printing, keying, faxing, and mailing. Responsible for maintaining and updating trackers and/or inventories. Attends SPB program staff meetings.

Marginal Functions

Percentage	Description
5%	Assists with other SPB program related administrative assignments and duties within the Bureau as required.

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 RPA 2627-00251	Effective Date
Classification Title Student Assistant	Position Number 564-929-4870-990
Working Title Student Assistant	Bureau and Section Sacramento Field Office, Field and Complex Account 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, 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 supervision of an Administrator I in the Sacramento Field Office, the Student Assistant will perform a variety of duties to support the Northern Region Collection and Public Counter Teams in order to meet the Field and Complex Account Collection Bureau and customer service goals.

Essential Functions

Percentage	Description
55%	Assists the Public Counter staff with the least complex account transactions and manual process tasks by performing a skip/scope on collections, processing mail received at the public counter through US Postal Service or interoffice mail; date stamp, sort, and distribute mail as needed. Completes the least complex processes and record payments received. Files copies of payments for other collector activity; responds to rush lien requests and/or copy documents from recorders, court, etc. Assists with administrative duties such as, working registration, answering incoming calls to schedule appointments, and assisting taxpayers as needed. Prepare the least complex Individual Status Letters and Entity Status Letters.
25%	Maintains statistical data and tracking of multiple monthly reports, including cash payments, credit card and check validation, mail volume, etc. Assesses collection notices and prepares a receipt for payments made, makes file copies, ensures adequate cash amounts for expected transactions daily and notates payments on assigned accounts for Collection staff.
10%	Assists staff by performing other of the least complex public counter duties, such as, ensure adequate volume of forms in public lobby, maintain adequate inventory of office supplies, place orders through Service and Supply to obtain required office supplies, order mandatory tax forms, submit work order service requests, etc.

Marginal Functions

Percentage	Description
10%	Assists in special projects related to the operation of the Sacramento Field Office, including but not limited to, tracking data on spreadsheets, analysis of program statistics, the development and 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

Supervisor: I certify that the above information accurately represents the described duties and functions of this position.

_____	_____	_____
Name (Print)	Signature	Date



Proposed

HR Date: 08/24/2026

HR Initials: AD

Duty Statement

Request for Personnel Action (RPA) Number RPA 2627-00320	Effective Date
Classification Title Student Assistant	Position Number 564-936-4870-990
Working Title Student Assistant	Bureau and Section BE Collection Bureau, Early Stage

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 an Administrator I in the Business Entities Collection Operations Section, the Student Assistant will perform a variety of duties in support of Early Stage and Late Stage Collection Units in order to meet the Business Entities Collection Bureau's (BECB) collection and customer service goals.

Essential Functions

Percentage	Description
55%	Assists the specialized Early Stage teams by organizing, categorizing, and prioritizing incoming faxes and/or correspondence for assignment to appropriate workbaskets in Case Management (CM). Uses the unit procedures to accomplish the tasks.
35%	Completes incoming tax computation requests at the lowest level from Early Stage staff using the tax computation application. Picks up mail from receiving for collections staff.

Marginal Functions

Percentage	Description
10%	Other support duties as needed, such as bundling outgoing mail, placing supply orders, photocopying, printing, scanning, scribing, and proctoring.

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