



Duty Statement

Request for Personnel Action (RPA) Number 2627-00481	Effective Date
Classification Title Analyst I	Position Number 564-410-5157-001
Working Title Technical Close Out Desk - Appeals	Bureau and Section Technical Resources Bureau/Administrative Proceedings and Support 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 supervision of the Administrator I of the Legal Administrative Proceedings Team, with functional guidance from the section's Analyst III, the incumbent works independently providing account analysis, transactions, and resolution support for the Legal Division by interpreting and applying personal income tax laws, regulations, and departmental procedures and policies. Incumbent performs various analytical tasks in support of the Legal Division Post Notice process. Responsibilities include analyzing and processing Post Notice cases and schedules, fielding questions, and providing input to customers regarding various Post Notice Issues. In addition, the incumbent computes claims and interest computations, including application of May Department Store rulings as appropriate, fund transfers and re-computation of tax and penalties on Post Notice cases.

Essential Functions

Percentage	Description
40%	Responsible for analyzing Post Notice cases, creating interest computation schedules, posting transactions to Taxpayer Information System (TI) and issuing notices to the taxpayers and/or representatives. Analyze Post Notice accounts for completeness, accuracy, determine the appropriate action to close appeals. Process case closures of appeals and settlements by issuing Notices of Determinations and refunds as appropriate. Provide technical assistance to the Legal staff on issues such as analyzing and providing interest computations schedules, return analysis, etc. Perform technical analysis of sensitive Legal cases for appropriate resolution as to proper notices issued and account transactions.
30%	Under the guidance of supervisor, analyze Stipulations, Decisions, and Dismissals received from the Office of Tax Appeals (OTA) to determine the disposition of the appeal case. May require recalculating the tax, penalties and interest on revised/modified cases. Responsible for preparing and sending dismissal letters to the taxpayer, if indicated in the final decision from the OTA. Analyze and determine application of credits and payments to taxpayers' accounts as well as abatement of tax and interest resulting from the Legal programs. Apply Avon and/or May Department Store, as applicable. Provide detailed schedules on accounts and make the necessary adjustments.

Percentage	Description
15%	Provide support to the Legal Division for taxpayer account research and resolution. Support activities include: • Using Taxpayer Information (TI), E-View, Integrated Nonfiler Compliance (INC), Image Delivery Application Expansion (IDAX), Taxpayer Folder (TPF), the Internet and other data sources to research taxpayer accounts. • Research information in Case Management • Summarizing the taxpayer data and creating spreadsheets, using MS Word and Excel to track incoming cases from settlement. Apply Personal Income Tax (PIT) tax law and departmental procedures ensuring Legal requests are in compliance with state law and department policy. Work closely with the Legal staff to ensure the accuracy of notices issued are complete and accurate.
10%	Assist with other support activities for the Legal Division workloads and initiatives, and other division projects and assignments. Assist the Correspondence and Hearing Desks as needed.

Marginal Functions

Percentage	Description
5%	Assist in updating the Legal Support procedures; including identifying and correcting any out- dated 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.

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