STATE OF CALIFORNIA
Franchise Tax Board

Proposed

HR Date: 10/05/2026

HR Initials: tk

Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
2627-00753	
Classification Title	**Position Number**
Program Specialist III	564-TBD-4366-TBD
Working Title	**Bureau and Section**
Program Specialist III	National Business Audit Bureau/Northern Region

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 National Business Audit (NBA) Northern Region Section Manager, the incumbent examines returns of the most sensitive and complex corporate taxpayers with the most elaborate and complex ownership hierarchies, large conglomerates engaged in diverse lines of business with interrelated tax issues, and/or groups of affiliated companies engaged in an integrated business in a specialized industry with unique and unresolved tax issues. The incumbent also acts as the highest-level specialist and technical resource to divisional and bureau level management and legal staff on matters concerning audit and tax issues, including the analysis of legislation. Incumbent is expected to maintain the confidentiality of data received or developed during the audit in accordance with the provisions of the Security and Disclosure Manual. The incumbent is expected to accomplish the functions below within the framework established by the laws and related legal interpretations administered by the Franchise Tax Board and consistent with the policies and procedures established for guidance within the National Business Audit Bureau. Audits are conducted leveraging the tools and working environments that provide resolution in an efficient & effective manner and preserve the interests of the state. Some travel is required and may include overnight and/or out of state travel.

Essential Functions

Percentage	Description
30%	Lead the most complex and/or sensitive audits of the largest, very complex, and most challenging corporate taxpayers having a major financial impact. The audit is to be conducted in accordance with audit standards, policies & procedures as detailed in the Manual of Audit Procedures (MAP). • Maintain the confidentiality of data received or developed during the audit in accordance with the provisions of the Security and Disclosure Manual. • Provide technical oversight of team audits by assisting in reviewing and evaluating audit work papers to ensure that the analyses and conclusions reached are based on sufficient and appropriate evidence. • Protect statutes of limitations (SOL) by planning and conducting audit activities to ensure the incumbent or the team complete examinations within a minimum of six (6) months before the SOL expires. • Confer with taxpayers and/or their legal representatives to request and discuss pertinent information by mail, telephone, virtual, and in person. • Prepare and ensure the audit team prepares clear and accurate issue summaries, schedules, and work papers to support the audit conclusions and recommendations through the appeal process.
30%	Act as an industry or issue subject matter expert (SME).

	• Provide technical information and guidance to staff through case consultations and/or the preparation and provision of training. • Participate in tax return screening and evaluation for potential NBA bureau or regional audit inventory. • Chair or participate in technical teams, forums, or taskforces focused on the development of specific industries and issues.
30%	Provide guidance on the taxation of multistate and multinational corporations. At the request of the NBA managers or supervisors, review large or sensitive audit cases in which unresolved issues have been raised and make recommendations for the disposition of those cases.

Marginal Functions

Percentage	Description
10 %	In addition to conducting audits, the incumbent is expected to perform other duties as required, such as attend training related to tax matters, as well as matters pertaining to FTB policies and procedures. Respond to special audit related assignments.

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