STATE OF CALIFORNIA
Franchise Tax Board

Current or Proposed
Proposed
Date Approved
10/15/2026
HR Initials
tk

DUTY STATEMENT

Request for Personnel Action (RPA) Number ERPA-2627-00155	**Effective Date**
Classification Title Analyst III	**Position Number** 564-389-5402-001
Working Title Analyst III	**Bureau and Section** Audit Services, Administration, and Protest Bureau Audit Budget & Administration 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 direction of the Administrator I, within the Audit Business Support Unit (ABS), function as a technical resource for staff in ABS, in the program areas within the Audit Division, and contacts throughout the department. Perform complex account adjustments and review technicians to ensure compliance. The focused work will be Business Entities (BE). The incumbent may also be cross trained to work Personal Income Tax (PIT).
As an organization that serves the Audit Division, ABS provides program specific technical, production and administrative support and is responsible for a number of highly sensitive as well as high volume workloads.

Essential Functions

Percentage	Description
45%	Process the most complex PIT and BE transactions in the FTB accounting systems to ensure they are accurate and consistent in accordance with tax laws and audit policies prior to issuance. Conduct training/inventory management/review/release complex work produced

	by technicians and analysts in ABS to ensure account transactions are accurate and consistent in accordance with tax laws and audit policies.
45%	Respond to various divisions and taxpayer(s) request(s) to analyze, evaluate, recommend and/or resolve account(s) in Taxpayer Information (TI), Business Entities Taxpayer System (BETS), Case Management (CM) and Taxpayer Folder (TPF). Complete the most complex interest computation requests from various divisions and taxpayer(s) to ensure the correct amount of interest is charged/allowed in accordance with tax laws. These include LCUP, Interest Netting and May Department Store computations. Act as a team resource and maintain a close relationship with the TRS LLC Liaison, BES Specialist and Legal in handling the analysis and processing of Limited Liability Company claim for refunds in response to specific court cases. Perform the technical analysis of complex and sensitive litigation and settlement cases for appropriate resolution with respect to issuing proper notices and account transactions. Ensure that the claims are handled in a timely and efficient manner.

Marginal Functions

Percentage	Description
10%	Represent the Audit Division/Enterprise, at management's request, on enterprise teams or act as a subject matter expert for current and/or upcoming projects. Create and update procedures/guides and the team SharePoint site. You may act as a back-up for unit leads.

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