STATE OF CALIFORNIA
Franchise Tax Board

Current or Proposed
Proposed
Date Approved
10/13/2026
HR Initials
KH

DUTY STATEMENT

Request for Personnel Action (RPA) Number ERPA-2627-00144	**Effective Date**
Classification Title Compliance Representative, FTB	**Position Number** 564-656-8619-007
Working Title Compliance Representative Field Collector	**Bureau and Section** Field & Complex Account Collection Bureau Northern Region 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 Collection Group Supervisor, the Compliance Representative will collect delinquent taxes or other debts, provide assistance to individuals, business entities, and taxpayers to ensure compliance with California laws, and perform a variety of compliance and collection functions. You will use the knowledge of all phases of debt collection and tax compliance to proactively perform all aspects of compliance work to resolve Personal Income Tax (PIT) and/or Business Entity (BE) cases, educate taxpayers to prevent future tax liabilities and non-compliance, and perform technical, staff, or administrative functions related to the enforcement program. The field collector is responsible for resolving collection cases by field contact. Taxpayer contact will be made via field visit, public counter contact and telephone contact. Field collectors are required to meet all requirements of Policy File 5035. Appointment to and continuation in this position requires that the incumbent possess a valid California Driver's License and proof of vehicle insurance.

Essential Functions

Percentage	Description
40%	Process an assigned caseload of Personal Income Tax and Business Entity accounts by utilizing collection tools and techniques to analyze cases, conduct scope and skip tracing, and determine appropriate voluntary or involuntary collection actions. Contact delinquent taxpayers through telephone,

	correspondence, and third-party outreach to request payment in full, explain assessments, secure compliance, and promote future adherence. Ensure due process requirements are met and all reasonable voluntary resolution efforts have been exhausted prior to initiating involuntary collection actions. Prepare clear and accurate narratives documenting case analysis, recommendations, and proposed resolutions, while maintaining strict confidentiality of all information obtained or developed during the collection process in accordance with the Security and Disclosure Manual and Information Security Manual.
30%	Effectively manage a daily caseload by conducting timely follow-up to ensure commitments are met by taxpayers, businesses, and their representatives, and initiating appropriate collection actions when commitments are not satisfied. Respond promptly to all correspondence and manage aged cases in accordance with unit procedures and established productivity guidelines to ensure efficient processing. Document collection files thoroughly with results from research and analysis, telephone and field contacts, and all incoming correspondence.
20%	Conduct field visits and complete Field Action Requests (FAR) to gain compliance, locate taxpayers and/or assets, and gather third-party contact information necessary for effective case resolution.

Marginal Functions

Percentage	Description
10%	Assist at the Public Counter as a back-up or as a technical resource. Assist with projects as assigned. Mentor new employees as needed.

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