STATE OF CALIFORNIA
Franchise Tax Board

Proposed

HR Date: 10/26/2026

HR Initials: RP

Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
Classification Title	**Position Number**
Career Executive Assignment (CEA)	564-706-7500-001
Working Title	**Bureau and Section**
Chief, Filing Division, CEA C	Filing Division

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 administrative direction of the Executive Officer, the Chief, Filing Division is responsible for the policy development and management of the Filing Division. The incumbent provides overall direction, coordination and evaluation of filing program policies for voluntary and non-voluntary return filing including processing and service functions. The incumbent is a member of the Executive Management Team and works closely with the Executive Officer, Chief Counsel, and Division Chiefs (Governance Council) in developing and implementing tax filing policies with a broad view of the effect of those policies on all internal programs and external parties. The incumbent works closely with others affected by tax filing policy including taxpayers, practitioners, representatives, and federal as well as other state and country taxing authorities. The Filing Division consists of over 1700 permanent full-time positions and approximately 500 part time and temporary employees whose mission is to provide citizens with resources and services to enable the accurate filing of income tax returns and payments. The division chief oversees four bureaus and the processing of over 21 million returns, 15 million payments and $65 billion annually.

Essential Functions

Percentage	Description
45%	Develops and implements tax filing policy and processes for the Filing Division in connection with all other departmental programs. Oversees the acceptance and processing of individual, business entity and nontax returns and forms, billings, and payments as well as the detection and prevention of tax filing fraud, identification of non-filers and enforcement of nonwage withholding for nonresidents and real estate transactions. Also oversees the education and outreach for taxpayers and ensures taxpayer compliance through return and payment validation, noticing, and enforcement activities. Directs the overall departmental filing function to achieve the desired program goals and objectives. Directs the strategic planning process for the department's filing function including approval of the work plans and the budget. Develops strategies for dealing with politically and publicly sensitive tax filing issues and evaluates public and political reactions to controversial and sensitive tax filing policies for the purpose of developing departmental policy recommendations.
35%	Sponsors the development and application of new processes and technologies in the Filing Division and works with the rest of the department and external parties to ensure that the way business is being conducted is compatible with the tax laws. Oversees the continued improvement of filing activities and the public access to information in an effort to increase voluntary compliance by developing and supporting self-service web applications and developing and distributing tax forms and by providing first-class customer service in tax filing assistance and billing response via telephone, electronic communication (including chat) and paper correspondence.

Percentage	Description
15%	The incumbent participates as a member of the department's executive management team, addressing enterprise policies and decision making, and setting strategic directions for the department. As the Filing representative on the Governance Council, the incumbent is responsible for ensuring that divisional and enterprise needs are appropriately balanced. Works closely with the Executive Officer, Chief Counsel and Division Chiefs to ensure that all departmental decisions are made taking into account all department policies, programs, and activities. Acts as the assigned back up for the Executive Officer on a rotating monthly basis in coordination with the other Division Chiefs.

Marginal Functions

Percentage	Description
5%	Oversee the development of performance measures which include costs, revenues and volumes and direct the monitoring and evaluation of these elements in an effort to reduce overhead and increase revenue.

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