STATE OF CALIFORNIA
Franchise Tax Board

Proposed

HR Date: 10/21/2026

HR Initials: Tm

Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
2627-00844	
Classification Title	**Position Number**
Administrator I	564-410-4358-001
Working Title	**Bureau and Section**
Administrator I	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 the general direction of the Legal Administrative and Support Section Manager, the incumbent independently directs and supervises the staff that supports the resolution of tax and nontax disputes via appeal, docketed protest, settlement and litigation programs as well as provide office support services for facilities, the library and Personal Computer (PC) Coordination. The incumbent plans, organizes, and directs staff to meet program objectives.

Essential Functions

Percentage	Description
50%	Plan, organize and direct the work of the Legal Administrative Support team to meet program goals. The Support team is responsible for: Completion of timely legal briefs of disputed tax matters and proper submission to taxpayers or their representatives and to the Office of Tax Appeals (OTA). In preparation for scheduled appeal hearings; completion of Legal correspondence and other legal support duties related to Docketed Protest, Litigation and Settlement programs. Maintain and resolve information technology or facility related issues; maintenance of and purchases for the Legal Law Library and staff; request for equipment and PC coordination.
35%	Review briefs including exhibits Secure Web Internet File Transfer (SWIFT) to the OTA to ensure OTA and Franchise Tax Board (FTB) briefing procedures and requirements are met. Resolve issues as they arise. Monitor/assess staff performance; provide coaching, mentoring and feedback to recognizing staff accomplishments and opportunities to improve and develop their skills. Prepare probationary and annual evaluation reports.
10%	Participate in departmental teams such as Business Process Owners Committee (BPOC) and task forces impacting Legal Divisions tax programs. Serve as Legals Representative for the Enterprise Risk/Watch Points. Monitor the tax appeals tickler report to assess workload levels for workload planning purposes. Evaluate Legals programs and process to determine opportunities for improvement and determine how departmental changes impact the team's process and workload.

Marginal Functions

Percentage	Description
5%	Backup for other section's supervisor/manager. Perform other duties as assigned by management including special assignments and teams.

Signature Authorization
FTB 7892 (REV 07-2022)

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