STATE OF CALIFORNIA
Franchise Tax Board

Proposed

HR Date: 10/14/2026

HR Initials: AC

Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
Classification Title Analyst II	**Position Number** 564-732-5393-007
Working Title Analyst II	**Bureau and Section** Processing Services Bureau / Information Validation 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 in the Information Validation Section, the Analyst II is responsible for providing analytical support by completing section projects and activities related to the maintenance and enhancement of various system applications, programs, and processes. The incumbent in the Analytical Support and Training and Procedures teams will work with section, bureau, programming, and systems management staff to help ensure the section's systems, processes, and training and procedures are operating efficiently and effectively. The Analyst II is also involved in section projects related to the implementation of new systems, technologies, procedures, and training. The incumbent will represent the section and bureau on a number of departmental focus groups and teams. Lastly, the Analyst II will also complete data research, analysis, and special projects. Working with staff throughout the department, your duties include:

Essential Functions

Percentage	Description
40%	Provide analytical support to section users, technical and training staff in the resolution of system issues and production problems. Research and make recommendations concerning issues impacting the section. Establish and lead teams and focus groups to resolve procedural and system issues. Develop procedural and workflow changes to address training issues, develop communication and procedure implementation strategies and present recommendations to management as necessary.
35%	Act as a point of contact for the section. Research and respond to various informational request or inquiries received within the enterprise. Prepare statistical reports, charts, graphs, and tables based on system-generated data. Produce special reports to assist section management in the evaluation and resolution of policy, procedural, and workflow issues.
10%	Analyze proposed legislation to determine its impact on the section's processes and systems. Collaborate with all levels of staff from throughout the department, determining resources such as classification and resource requirements, in addition to the core function or RA system enhancements. Perform research to determine the impact to process new workloads while gauging impact to existing workloads. Help develop alternatives and recommendations for changes as necessary.
10%	Participate on special assignments and teams within the enterprise. Represent the section and bureau on a number of departmental focus groups and teams. May be assigned to long-term projects or activities outside of the section.

Marginal Functions

Percentage	Description
5%	Represent the section during meetings and/or presentations in the supervisor's absence.

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