STATE OF CALIFORNIA
Franchise Tax Board

Proposed

HR Date: 11/03/2026

HR Initials: AC

Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
2627-01039	
Classification Title	**Position Number**
Tax Program Technician II (TPT II) - Limited Term	564-732-9588-088
Working Title	**Bureau and Section**
TPT II - Training and Procedures	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 a Tax Program Supervisor in the Information Validation Section (IVS) of the Processing Services Bureau (PSB) the Tax Program Technician II (TPT II) ensures IVS staff are provided with the correct and appropriate procedures and training. The incumbent serves as the expert staff resource and is independently responsible for the most difficult and complex work assignments. This includes but is not limited to identifying, researching and resolving system or procedural issues. The incumbent prepares and updates procedures and training manuals for the new filing season. In addition, the TPT II provides training for the section's staff while coordinating these activities with other areas of the unit and section. These duties are performed in a production environment where you must be able to work both independently and in a team environment, adapt to changing workloads and priorities, exercise good judgment and must be willing to learn a variety of tasks.

Essential Functions

Percentage	Description
45%	Prepare and update procedures and training manuals. Develop schedules to ensure revised and new procedures are completed and in place for the new filing season. Lead and participate in teams performing research to develop and implement new procedures and revise current business processes. Review new or revised policies and procedures to ensure accuracy and consistency with policies procedures, and directives.
35%	Develop and conduct training modules, coordinate training schedules and guest speakers. Coordinate major activities related to the development of section training. Work with System Management staff to develop a training environment and lead teams to develop training accounts and/or training scripts. Provide processing units and other sections with technical expertise and advice.
15%	Identify and research procedural problems, provide alternatives, and make recommendations. Work with section analysts, programming staff and testing staff to implement and monitor system changes. Work with section processing and supervisory staff to develop valid processing alternatives. Assist with the development and/or implementation of new workload strategies. Provide statistical and other information to aid the section's operational, resource, and budgetary planning process.

Marginal Functions

Percentage	Description
5%	May be assigned to special projects, lead teams, and required to attend meetings with representatives from other units, sections or other state departments.

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