STATE OF CALIFORNIA
Franchise Tax Board

Current or Proposed
Proposed
Date Approved
10/20/2026
HR Initials
tk

DUTY STATEMENT

Request for Personnel Action (RPA) Number ERPA-2627-00150	**Effective Date**
Classification Title Analyst I	**Position Number** 564-389-5157-003
Working Title Analyst I	**Bureau and Section** Audit Services, Administration, and Protest Bureau Audit Budget & Administration 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 supervision of the Administrator I, within the Audit Business Support Unit (ABS), the incumbent will function as a technical resource for staff in ABS, in the program areas within the Audit Division, and contacts throughout the department. Perform complex account adjustments and review technicians to ensure compliance. The focused work will be Personal Income Tax (PIT). The incumbent may also be cross trained to work Business Entities (BE).
As an organization that serves the Audit Division, ABS provides program specific technical, production and administrative support and is responsible for a number of highly sensitive as well as high volume workloads.

Essential Functions

Percentage	Description
45%	Process complex PIT and BE transactions in the FTB accounting systems to ensure they are accurate and consistent in accordance with tax laws and audit policies prior to issuance. Conduct training/inventory management/review/release less complex work

	produced by technicians in ABS to ensure account transactions are accurate and consistent in accordance with tax laws and audit policies.
45%	Respond to various divisions and taxpayer(s) request(s) to analyze, evaluate, recommend and/or resolve account(s) in Taxpayer Information (TI), Business Entities Taxpayer System (BETS), Case Management (CM) and Taxpayer Folder (TPF). Complete complex interest computation requests from various divisions and taxpayer(s) to ensure the correct amount of interest is charged/allowed in accordance with tax laws.

Marginal Functions

Percentage	Description
10%	Represent the Audit Division/Enterprise, at management's request, on enterprise teams or act as a subject matter expert for current and/or upcoming projects. Create and update procedures/guides and the team SharePoint site. May act as a back-up for unit leads.

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