STATE OF CALIFORNIA
Franchise Tax Board

Current or Proposed
Proposed
Date Approved
10/27/2026
HR Initials
AD

DUTY STATEMENT

Request for Personnel Action (RPA) Number ERPA-2627-00174	**Effective Date** 11/15/2026
Classification Title Compliance Representative, FTB	**Position Number** 564-767-8619-018
Working Title Compliance Representative (Lead)	**Bureau and Section** Filing Compliance Bureau Withholding Services and Compliance 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 close supervision of the Administrator I, in the Withholding Services and Compliance Section (WSCS), the Compliance Representative primarily functions as a team lead for paraprofessional staff. The incumbent provides assistance to taxpayers, withholding agents and tax professionals to ensure compliance with California tax laws. The Compliance Representative provides a high degree of professional and technical assistance and training to team members. Knowledge of and experience in Personal Income Tax (PIT) and Business Entities (BE) tax laws and processes is required. The incumbent explains pertinent legal provisions, regulations, and related administrative practices and their application to specific cases to both internal and external customers.

Essential Functions

Percentage	Description

40%	Provide technical guidance, direction and leadership to team members consistent with the department's public service objectives. Independently analyze taxpayer information to assist the customer in determining withholding requirements and appropriate forms for the customer to file. Explain the reason(s) for change in liability. Ability to assess tax, interest and penalties and make adjustments to accounts. Prepare complex account resolution transactions. Explain application of law related to penalties and interest, and reconstruct accounts to determine the correct outcome of adjustments. Review the general written work and account transactions of Tax Technician and Tax Program Technician team members. Along with the supervisor and Senior Compliance Representative (SCR) Lead, assist in identify training needs and provide one-on-one training with new and veteran employees. Evaluate and recommend actions that may be taken to improve the quality and quantity of work performed. Perform appropriate adjustments.
30%	Assist in creation of training and procedure guides for Tax technican and Tax Program Technician I that will enhance their job knowledge to improve quality of service provided to customers. Identify workflow problems with the Withhold at Source System to improve the processing of withholding forms for customers. Keeps supervisor informed on the status of workflow problems and team projects. Identify and report system or procedural problems and suggest appropriate improvements or alternatives to resolve those problems to the System Analysis and Support team in WSCS. Resolve the less complex and sensitive cases referred from staff. Gather pertinent information and contact customers to explain account information.
25%	Work as a liaison between Withholding Services and Compliance Section and other sections in the department to improve the work processes by educating customers on pertinent Withholding requirements related to PIT and BE tax laws. Represent WSCS on unit/section/divisional teams and projects to establish policy in accordance with tax laws and implement procedures pertaining to withholding matters.

Marginal Functions

Percentage	Description

5%	Provide information to the Tax Forms Development & Distribution and Editorial Services pertaining to law changes and policy changes.

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