STATE OF CALIFORNIA
Franchise Tax Board

Current or Proposed
Proposed
Date Approved
10/30/2026
HR Initials
AD

DUTY STATEMENT

Request for Personnel Action (RPA) Number ERPA-2627-00179	**Effective Date** 12/01/2026
Classification Title Program Specialist II, FTB	**Position Number** 564-767-4365-001
Working Title Program Support	**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 general direction of the Administrator II Withholding Services & Compliance Section, the Program Specialist II acts as a primary resource for technical and tax policy issues relating to the nonwage withholding tax laws administered by the department; performs analysis of the most critical and specialized functions having departmental impact relating to withhold-at-source tax policy; is recognized as a subject matter expert in the area of withhold-at-source compliance and enforcement; serves as project and implementation leader; provides guidance to other bureau specialists, analysts, and leads.

Essential Functions

Percentage	Description

50%	Perform technical law analysis of the most complex and sensitive issues for the purpose of making policy recommendations to management. Analyze and oversee the analysis proposed legislation to determine its impact on the withhold-at-source program from both a technical and administrative perspective. Work with the Legal and other FTB subject matter experts (SME) business areas to research data and legislative proposals. Identify new non-compliance workloads in support of the department's Tax Gap strategies. Oversee the internal forms review process for all withholding forms and publications.
25%	Provide technical advice and expertise related to the withhold-at-source program to departmental staff, including the Executive Officer, senior management, and Legal. Partner with internal and external stakeholders on law and policy implementation. Represent the department at outreach events related to nonresident or real estate withholding. Prepare and deliver in-person and virtual presentations, training, and webinars to internal and external stakeholders. Participate in special assignments and projects. Travel may be required.
15%	Work closely with various customers on enterprise-wide projects in identifying and developing compliance initiatives. Plan, coordinate, monitor, evaluate, and provide technical support on a program wide basis.

Marginal Functions

Percentage	Description
10%	Keep supervisor informed of sensitive cases to ensure consistent application of policies and procedures. Provide technical training and guidance to bureau staff on the most complex withholding and tax law issues.

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