STATE OF CALIFORNIA
Franchise Tax Board

Proposed

HR Date: 11/13/2026

HR Initials: CB

Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
2627-01045	
Classification Title	**Position Number**
Graduate Student Assistant	564-954-4872-990
Working Title	**Bureau and Section**
Student Assistant	Legislative Services Bureau

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 Administrator III, of the Legislative Services Bureau (LSB), in a training capacity, the Student Assistant will assist support staff with the eRoom replacement project, SharePoint inventory management, and case storage solutions for the Legislative Services Bureau. The incumbent will assist support staff in identifying and monitoring proposed tax and non-tax legislation that could affect the Franchise Tax Board (FTB).

Essential Functions

Percentage	Description
35%	In a training capacity, assist with eRoom replacement project tasks. Work collaboratively with LSB support staff and the department's Information Technology staff to assist them in evaluating, developing, testing, and implementing new technologies and automated systems that support the department's bill analysis and case management functions. Assist with eRoom data transition process. In collaboration with the LSB support staff & LSB leadership team, ensure data and/or records are stored, retained, deleted, purged or archived as needed in accordance with the FTB's data retention policy. Assist in the documentation of processes and procedures related to the new and ongoing solution.
30%	In a training capacity, assist LSB support staff to maintain the LSB Case Tracking Site, the LSB Case Management Solution and prepare monthly workload reports. Assist with identifying and monitoring proposed tax and non-tax legislation that could affect the FTB. Work closely with program areas to identify appropriate search terms and code sections used to determine which bills impact the FTB. Communicate information regarding Non-RTC bills to affected program areas to determine the level of analysis required. Assist with monitoring, reviewing, and modifying State Net Corporation reports to identify critical timelines for the completion of bill analyses and the presentation of testimony before legislative committees. Gather and analyze data regarding the status of time-sensitive analyses and assist with preparing bill-tracking reports for internal and external stakeholders.
30%	In a training capacity, compile research and gather information on relevant tax issues to assist in the preparation of bill analysis as it relates to proposed changes to Personal Income Tax (PIT) and Corporation (Corp) Tax Laws. This would include identifying federal and state tax law and policy developments, identifying prior bills with similar proposed law changes, doing general research on a tax topic, identifying the applicable federal and state law sections, and researching existing or prior program background information that could be used to further external parties understanding of the bills proposed changes. Assist in responding to special requests, documenting LSB workflow, tracking bills, drafting requests, receiving training, and attending internal/external stakeholder meetings as needed.

Marginal Functions

Percentage	Description
5%	Attend meetings, may take meeting minutes, and type up notes for the team. Learns to work in a team environment to assist and provide customer service to gain real-life hands-on experience. Assist with special projects or time sensitive assignments as needed

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