STATE OF CALIFORNIA
Franchise Tax Board

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

DUTY STATEMENT

Request for Personnel Action (RPA) Number ERPA-2627-00165	**Effective Date** 01/04/2027
Classification Title Analyst I	**Position Number** 564-740-5157-007
Working Title Analyst I	**Bureau and Section** Processing Services Bureau Information Capture and Banking 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, as a team member of the Information Capture and Banking Section (ICBS) Project and Analytical Support Unit, the incumbent assists in activities related to the analysis and support of the department's services and projects that have direct impact on the ICBS. The analyst in this position is responsible for providing analytical support including case studies, analytical review, impact and trend analysis, and oversight/coordination of team projects and assignments.

Essential Functions

Percentage	Description
35%	Provide analytical support for activities related to the department's services and projects that impact the Information Banking and Capture

	Section. The activities may include analysis of functional and/or business requirements and user specifications; impact analysis of system functionality; analysis and recommendations for system enhancements, business solutions, or potential and identified operational issues.
30%	Participate in departmental project teams such as the EDR2 project. Work with higher level analysts to review, research and analyze all project related issues and documentation. Assist the team's lead in coordinating all the project related activities that may include creating and presenting project documentation to ICBS or other staff for communication and training purposes.
15%	Provide statistical data to support management in planning, budgeting, staffing and training for project changes, system enhancements, new system implementations, PC procurements, installations and other issues related to new system or project implementations and to support recommended solutions for problem/issues.
10%	Analyze Image Processing and Cashiering System (IPACS) and iCapture technical fallouts and account/transaction resolution. Provide assistance in reviewing and updating procedures and training materials for all ICBS systems such as IPACS, iCapture, Fi$Cal, Manual Deposit Confirmation (MDC), Deposit Information Research Tool (DIRT), and Deposit 21.

Marginal Functions

Percentage	Description
5%	Identify process improvement opportunities and provide suggestions for increasing the processing effectiveness and efficiency of the ICBS workloads. Assist in preparing budget change proposals, feasibility study report and departmental issue papers. Assist ICBS in meeting service level agreements of core production workloads
5%	Other duties may include: Act as the back-up to lead person and fellow team members; scheduling and facilitating meetings; provide meeting notes; assist in brainstorming and planning sessions; represent the section or bureau on special projects/teams; provide support to higher level analysts. Assist ICBS in meeting service level agreements of core production workloads.

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