



## DUTY STATEMENT

<b>Request for Personnel Action (RPA) Number</b> ERPA-2324-00161	<b>Effective Date</b> 08/01/2024
<b>Classification Title</b> Information Technology Associate	<b>Position Number</b> 564-290-1401-008
<b>Working Title</b> Data Exchange Analyst	<b>Bureau and Section</b> Operations Management Bureau  Secure Data Capture & Technology Tools 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 Direction of the Information Technology Supervisor II in the Secure Data Capture & Technology Tools Section (SDCTT) and technical direction of the Paper Data Capture Operations (PDCOPS) Lead and Architect, and the technical assistance of the IT Specialist I subject matter expert (SME), the Information Technology Associate is responsible for analyzing complex varied incidents, providing analytical and technical skills to promote the processing of numerous incoming and outgoing data files in support of the Data Exchange Production Services (DEPS) team. Additionally, the incumbent is responsible to process continuous high priority workflows; communicate effectively (orally and in writing) with internal and external customers, methodologies, manuals, tools, and equipment; complete assignments in a timely and efficient manner; support departmental Mission & Values and adhere to policies/procedures regarding data security and confidentiality. The incumbent may act as lead person on special projects. Throughout the year, it may be necessary to alter your work schedule, suspend alternate work schedules (AWS) or work extra hours, to provide the 24x7x365 coverage due to operational needs. During annual tax season (Nov-Dec) and filing season (Jan-Apr), extended vacation time is limited (more than one week, unless prior arrangements have been made), especially during the month of December, January, and April. The position provides services which encompass the IT domain of Client Services.

### Essential Functions

Percentage	Description

40%	<ul style="list-style-type: none"> <li>• Provides technical and analytical support in the processing of the high to average priority magnetic media and electronic files received in the unit</li> <li>• Provides initial data editing and validation of incoming and outgoing files</li> <li>• Makes logical decisions for the correct resolution of problems to these systems</li> <li>• Resolves procedural problems; analyze problem files of high to average difficulty; and communicate these problems in such a manner that will achieve timely resolution</li> </ul>
30%	<ul style="list-style-type: none"> <li>• Uploads, downloads, and processes transmitter data to and from the mainframe using approved department file transfer software</li> <li>• Responds to telephone inquiries to assist tax data transmitters in preparing accurate files; clarify reporting requirements; and determining waiver and extension criteria. Monitor modifications to Job Control Language (JCL) for the editing of incoming data, which will include validating edit results for abends, missing data, and/or format errors</li> </ul>
25%	<ul style="list-style-type: none"> <li>• Copies mainframe data files for internal and external customers using various software utilities as constituted by the arrival of a request to copy</li> <li>• Maintains logging systems (using MS ACCESS) and copy confidential IRS data</li> <li>• Researches vault storage issues and retention periods for IRS data</li> <li>• Assists in the development and maintenance of informational documentation and procedures for the reporting of tax data on magnetic media and electronic files</li> </ul>

## Marginal Functions

Percentage	Description
5%	<ul style="list-style-type: none"> <li>• Monitor Information Technology trends, evaluate and/or assist in the evaluation of existing or new information support technologies and act as a lead on special projects, when assigned</li> </ul>

**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