



STATE OF CALIFORNIA
Franchise Tax Board

Proposed

HR Date: 04/01/2025

HR Initials: JPS

Duty Statement

Request for Personnel Action (RPA) Number 2425-02071 through 2425-02104	Effective Date
Classification Title PI Tax Technician	Position Number 564-825-7505-xxx
Working Title Agent Operations	Bureau and Section Filing Services Bureau (FSB)/ Taxpayer Services Center Section (TSCS)

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 supervision of the Customer Service Supervisor in Taxpayer Services Center Section, in a contact center, the incumbent will professionally receive and respond to phone and/or written inquiries (live chat, & correspondence from customers and their representatives). These inquiries include requests for information pertaining to all programs administered by the Franchise Tax Board. In addition, receive requests for information regarding programs administered by other state departments and taxing agencies. When dealing with the public, exercise professionalism and good judgment to assist the customer in identifying the exact nature of the issue that prompted the contact and explain pertinent legal provisions, regulations, and related administrative practices.

Essential Functions

Percentage	Description
40%	Responds to phone and/or written inquiries in a clear, professional, and timely manner by telephone and/or by preparing a written response through correspondence and/or Live Chat. Analyzes the less complex taxpayer information to assist the customer in determining filing requirements; which form(s) are appropriate for the taxpayer to file; resolves revenue resolution problems and issues resulting from Audit, Collections, and Filing Program activities; explain the reason(s) for tax liabilities; abates tax and issues refunds; assesses tax as required; prepares complex account resolution transactions; explains application of law related to penalties and interest; and reconstructs accounts to determine the correct outcome of adjustments. Follows the Department's policy for Privacy and Disclosure at all times to ensure the protection of taxpayer information.
35%	Provides immediate information regarding taxpayer rights, privileges, and obligations under the Personal Income Tax (PIT) and Business Entities (BE) tax laws. Provides and explains new services available through the FTB website. Explains all payment arrangement options, including informal 90-day payment arrangements, formal installment agreements, and hardship procedures involving Earnings Withholding Orders for Taxes (EWOTs) and Orders to Withhold (OTWs). Releases EWOTs and OTWs or modify them to reflect a revised amount due when procedures permit. Explains and follows through with Western Union Quick Collect payment procedures and determine if the taxpayer has received due process during billing cycles. Explains the lien process and resolve liens issued in error. Answers general questions regarding FTB special programs. Performs the transactions necessary to correct accounts. Cancels tax, penalties, and interest that resulted from erroneous adjustments or billings.

Percentage	Description
15%	Participates in special projects and other short-term workloads. Provides assistance or act as a resource for other tax technician for the purposes of pursuing job shadowing or career development opportunities. Provides information regarding programs administered by other state departments and taxing agencies.

Marginal Functions

Percentage	Description
5%	Attends meetings and FTB events as required. May participates in departmental focus groups to improve customer service; assists with special projects assigned to the section; and conducts customer surveys.
5%	May be assigned other duties, acting as a resource to management and staff for special assignments and tasks, such as assisting with training, mentoring, and other special assignments representing the contact center.

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



STATE OF CALIFORNIA
Franchise Tax Board

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HR Date: 04/01/2025

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Duty Statement

Request for Personnel Action (RPA) Number 2425-02127- 2425-02133	Effective Date
Classification Title PI Tax Technician	Position Number 564-828-7505-xxx
Working Title Agent Operations	Bureau and Section Filing Services Bureau (FSB)/ Correspondence, Analysis, Support, and Education Section (CASES)

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 supervision of the Customer Service Supervisor in Taxpayer Services Center Section, in a contact center, the incumbent will professionally receive and respond to phone and/or written inquiries (live chat, & correspondence from customers and their representatives). These inquiries include requests for information pertaining to all programs administered by the Franchise Tax Board. In addition, receive requests for information regarding programs administered by other state departments and taxing agencies. When dealing with the public, exercise professionalism and good judgment to assist the customer in identifying the exact nature of the issue that prompted the contact and explain pertinent legal provisions, regulations, and related administrative practices.

Essential Functions

Percentage	Description
40%	Responds to phone and/or written inquiries in a clear, professional, and timely manner by telephone and/or by preparing a written response through correspondence and/or Live Chat. Analyzes the less complex taxpayer information to assist the customer in determining filing requirements; which form(s) are appropriate for the taxpayer to file; resolves revenue resolution problems and issues resulting from Audit, Collections, and Filing Program activities; explain the reason(s) for tax liabilities; abates tax and issues refunds; assesses tax as required; prepares complex account resolution transactions; explains application of law related to penalties and interest; and reconstructs accounts to determine the correct outcome of adjustments. Follows the Department's policy for Privacy and Disclosure at all times to ensure the protection of taxpayer information.
35%	Provides immediate information regarding taxpayer rights, privileges, and obligations under the Personal Income Tax (PIT) and Business Entities (BE) tax laws. Provides and explains new services available through the FTB website. Explains all payment arrangement options, including informal 90-day payment arrangements, formal installment agreements, and hardship procedures involving Earnings Withholding Orders for Taxes (EWOTs) and Orders to Withhold (OTWs). Releases EWOTs and OTWs or modify them to reflect a revised amount due when procedures permit. Explains and follows through with Western Union Quick Collect payment procedures and determine if the taxpayer has received due process during billing cycles. Explains the lien process and resolve liens issued in error. Answers general questions regarding FTB special programs. Performs the transactions necessary to correct accounts. Cancels tax, penalties, and interest that resulted from erroneous adjustments or billings.

Percentage	Description
15%	Participates in special projects and other short-term workloads. Provides assistance or act as a resource for other tax technician for the purposes of pursuing job shadowing or career development opportunities. Provides information regarding programs administered by other state departments and taxing agencies.

Marginal Functions

Percentage	Description
5%	Attends meetings and FTB events as required. May participates in departmental focus groups to improve customer service; assists with special projects assigned to the section; and conducts customer surveys.
5%	May be assigned other duties, acting as a resource to management and staff for special assignments and tasks, such as assisting with training, mentoring, and other special assignments representing the contact center.

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