Personas

This document contains Personas for the following roles:

- Tax Director – Deborah
- Tax Auditor - Auditor
- Tax Program Specialist – Peter
- Protest Hearing Officer - Penny
- Admin - Blake

Infiniti created these personas based upon research with former employees from Franchise Tax Board.

Name, Role	Details	Goal
Deborah (Director)	51 years old, degree in mathematics, CPA, 30 years with the department. I have 800 auditors, tax specialists, hearing officers, and legal staff reporting to me. I like to make processes efficient so that my teams are effective Work from 8am to 5pm.	Give my staff better tools. Achieve revenue collection goals for department.

Directors of the Personal Income Tax Division seek to **increase the accuracy of personal income tax adjustments** within the organization. The Director wants to **make information** pertaining to the tax law, tax regulations, and experts' interpretation of laws **readily available to Tax Auditors**. Information on **which tax adjustments are most profitable and likely to be upheld at the protest level, legal level, and within the courts should be a priority.**

Name, Role	Details	Goal
Anne (Tax Auditor)	31 years old, degree in mathematics, CPA, 10 years with the department. I like to follow pre-defined steps to perform my audits and not have to research too much. I used to focus on multi-State audits because they were complex and challenging but have now moved to desk audits because I can finish many more audits. Work from 6am to 2pm.	Precision in my audits to quickly and easily identify tax adjustments. Confidence that I am following applicable rules, policies, and regulations.

Tax Auditors – Tax auditors **review tax returns** to **identify possible tax adjustments** that will result in **additional income tax owed to the State**. Tax auditors rely on their own **case law research** to make these adjustments. In some cases, they **may be aware of certain positions the State has taken regarding certain adjustments**, but mostly they are making their own determinations based on their individual research.

Name, Role	Details	Goal
Peter (Tax Program Specialist)	35 years old, degree in business, CPA, 15 years with the department. Use Excel for everything that I can. Really enjoy using new software that helps me get my job done. I have the latest iPhone and many apps that I use every day. Works from 8am to 5pm.	Quickly document my articles on tax law interpretation to allow my auditors follow the same approach to their audits. Avoid protests and appeals.

Tax Program Specialists: P/S are responsible for **interpreting the tax law and preparing positions for the State**. They **provide guidance and direction to Tax Auditors and considered the subject matter experts on tax law.** P/S's jobs are to provide guidance to Tax Auditors; however, **this is on a case by case basis**. **In some cases, they prepare reviews of the tax law**, but these are hard to find.

Name, Role	Details	Goal
Penny (Protest Hearing Office)	41 years old, degree in sociology, CPA, 19 years with the department. I like to research every aspect of an audit including federal tax code, California Tax code, Department Research, FAQS, and talk to my peers before I make my determination. I prefer to print everything out and mark up the hard copies with my notes. I do not like having to learn new tools or having to adjust to new ways of doing things. Works from 8am to 5pm.	Have a tool that gives me all the information on specific areas of tax code in one place. Easy to find articles.

Protest Hearing Officers (PHOs) – PHOs **review the adjustments, perform their own research and either deny or approve the protest.** PHOs **collect information similar to Tax Auditors and make their own determination**. There is **no central place of knowledge on the State's position to make these determinations**.

Name (Role)	Details	Goal
Blake (Admin)	29 years old, ex-military, learned desktop support while in the Army. 4 years of server support and system admin experience. Supports hundreds of servers, thousands of users, and manages dozens of applications. I enjoy learning new technologies and helping people. Work from 6am to 2pm.	Quickly make configuration changes to software to meet my user's needs

Administrator (Admin) – Admins **configure and manage software solutions** to ensure users have the functionality they need. Since they must **support large volumes of users and applications**, it is important to be able to **identify the most critical issues for resolution first**. Admins want to be able to make changes efficiently and quickly to a**ddress the most number of users possible with the same issues**.