

Audit Pathways to Excellence PowerPoint

Franchise Tax Board Meeting

Thursday, March 4, 2021

Slide 1: Audit Pathways to Excellence

A Brief Portal Overview

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Slide 2: Audit Pathways to Excellence

Audit Division Goal

- Invest in staff development
- Train in technical issues to increase knowledge
- Provide opportunity for professional development
- Engage staff to work at increasing proficiency

Slide 3: The Pathways Model

Auditor Holistic Development

- Integrates cross-functional learning
- Combines course work, experiences, and partnerships
- Bridges new hires to expert proficiency
- Compiles all tools and training in one location
- Flexible for staff to map their own pathway

Slide 4: Portal Content

One-Stop Shop

- Serves multiple audit programs and workloads
- Brings together multiple resources
- Provides information from preliminary to advanced learning
- Organizes the portal to be user-friendly

An image of two website icons are shown displaying “NBA” on the first icon and “IPTE” on the other icon.

Slide 5: Knowledge Areas

Common Audit Issues

- Landing Page
- Knowledge Path
- Tool Box
- Technical Training

Three blue interstate icons appear on screen. The first reads “Nexus”. The second reads “Apportioning Trusts”. The third reads “Fiduciary Fees”.

Slide 6: Knowledge Path

Outline of Issue

- Subtopics are organized for different levels
- Levels are numbered by complexity
- Preliminary understanding to advanced knowledge

A rectangular website button with the words “Knowledge Path” appears on screen, followed by icons representing “100”, “200”, and “300”.

Slide 7: Tool Box

Compiled Authorities

- State and federal authority
- FTB Legal and Audit guidance
- Judicial guidance

A rectangular website button with the words “Tool Box” appears on screen, followed by icons representing “State Authority” and “Federal Authority”.

Slide 8: Technical Training

Learning Tools

- In-house training
- News articles
- Other training resources

A rectangular website button with the words “Technical Training” appears on screen.

Slide 9: Experiences Matrix

More Than Just Tax Laws

- On-the-job learning
- Soft skills development
- Organized in outline format with resources
- Collaboration and project ideas

A rectangular website button with the words “Experiences Matrix” appears on screen.

Slide 10: Next Steps

Expansion and Maintenance

- Update and keep all resources current
- Maintain digital accessibility
- Create new issue paths
- Long-term development of all division auditors

Slide 11: Questions?

Slide 12: Public Comment