

California Department of Tax and Fee Administration

DUTY STATEMENT

☐ CURRENT
☐ PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION Tax Technician III		WORKING TITLE Tax Technician III	
DIVISION/OFFICE/UNIT FMD/FOB/Local Revenue Branch		SPECIFIC LOCATION ASSIGNED TO Sacramento, CA - Headquarters	
SEERA DESIGNATION Rank and File	BARGAINING UNIT R04	WORK WEEK GROUP 2	CERTIFICATES REQUIRED None
FINGERPRINTS/BACKGROUND CHECK REQUIRED <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	BILINGUAL POSITION <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	SUPERVISION EXERCISED None	
INCUMBENT		POSITION NUMBER (Agency-Unit-Class-Serial) 291-486-1975-	
<p><i>The mission of the California Department of Tax and Fee Administration is to make life better for Californians by fairly and efficiently collecting the revenue that supports our essential public services.</i></p>			
<p>POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS</p> <p>Under the general direction of the Supervising Tax Auditor (STA) I, the Tax Technician (TT) III serves in a lead capacity to provide technical assistance to the TT I and II level staff on the Area Codes and Registration teams. The TT III performs duties with a high degree of independence and applies detailed knowledge of Business Taxes laws, rules and regulations, and policies and procedures as it pertains to the assignment of tax area coding to sites and account maintenance functions. The TT III assists other California Department of Tax and Fee Administration (CDTFA) offices and staff with questions regarding account maintenance functions on registration records. Serves as an expert staff resource on the most complex registration functions and initiates incident reports for resolution of program problems. In addition, the TT III serves as staff resource expert for utilizing the Centralized Revenue Opportunity System (CROS).</p> <p>Candidate must be able to perform the following essential job functions with or without reasonable accommodation.</p>			
PERCENTAGE OF TIME SPENT	DUTIES		
60%	<p><u>ESSENTIAL JOB FUNCTIONS</u></p> <p>Reviews and/or assigns tax area codes for sales and use tax accounts and other CDTFA tax programs, including but not limited to, sales and use tax returns, consultant inquiries, registration records, telephone and email inquiries. Communicates with CDTFA office staff, various city and county officials, and taxpayers via telephone and email to obtain information necessary to assign correct tax area codes to registration records. Makes necessary online corrections to the registration record and identifies local tax reallocation or district tax redistributions that may require correction. Makes necessary registration period and/or site maintenance updates. Clears necessary work items in CROS. Assists in the processing of annexations, incorporations or boundary changes within jurisdictions. Trains new employees, reviews potential program problems in the system that is identified, documents problems and submits to the Technology Services Division (TSD) for resolution. Responds to telephone calls and emails from CDTFA staff requesting assistance in the use of the online registration system for unusual or difficult registration account maintenance record/modifications. Responds to emails from public for tax rate information.</p>		
30%	<p>Performs special projects requiring the highest degree expertise of tax area code and complex registration issues as directed by the Supervising Tax Auditor level staff within the Bureau. Creates and/or performs maintenance of team's workload databases for purpose of compiling monthly statistical reports to management. Includes the sorting of information on spreadsheets received from other CDTFA divisions and submission of data to the STA I for evaluation and implementation.</p>		

10%

MARGINAL JOB FUNCTIONS

Performs other job-related duties as required. Works as a Remote Agent, performs cashier duties as necessary, and assists other CDTFA units as needed.

WORK ENVIRONMENT OR PHYSICAL ABILITIES REQUIRED FOR THE JOB (if applicable):**Work Environment:**

- High-rise building

Physical Abilities:

- Ability to remain in a stationary position, consistent with office work, for extended periods of time.
- Daily use of a computer, phone, and office equipment.

Additional Requirements/Expectations:

- Overtime may be required during rush periods to meet operational needs

I have read this duty statement and fully understand that I must perform the Essential Job Functions of my position with or without reasonable accommodation.

PRINT EMPLOYEE NAME

EMPLOYEE'S SIGNATURE

DATE

I certify that the above accurately represents the duties of the position and that I have reviewed these duties with the above named employee.

PRINT SUPERVISOR NAME

SUPERVISOR'S SIGNATURE

DATE

HRB Approval Date: 07/28/2022

C&P Analyst Initials: MD