

California Department of Tax and Fee Administration DUTY STATEMENT

CURRENT
 PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION Tax Technician I		WORKING TITLE Tax Technician	
DIVISION/OFFICE/UNIT Field Operations Division/		SPECIFIC LOCATION ASSIGNED TO , CA	
SEERA DESIGNATION Rank and File	BARGAINING UNIT 04	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- -1973-		

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.

POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS

Under the close supervision of the Business Taxes Administrator I (BTA I), the Tax Technician I learns and performs the less difficult and complex technical duties and support functions. This includes, but is not limited to, applying laws, rules and policies relating to the California Department of Tax & Fee Administration's (CDTFA) programs; issuing permits, performing account maintenance duties, including the filing and pulling of taxpayer records and account files, initiating contact with taxpayers on billings and delinquencies, accessing taxpayer information via a computer and/or modifying account information as necessary, processing incoming and outgoing mail, which may include money payments and handling sensitive and confidential mail and/or material.

The incumbent may be eligible to receive additional compensation each month for public contact through the telephone per Pay Differential 186.

Candidate must be able to perform the following essential job functions with or without reasonable accommodation.

PERCENTAGE OF TIME SPENT	DUTIES
40%	<u>ESSENTIAL JOB FUNCTIONS</u> Provides selected tax law information and routine advisory services to taxpayers and their representatives. Logs in walk-in-customers and notifies technical staff when a taxpayer arrives for an appointment. Answers and transfer incoming calls, as needed, to appropriate staff. Provides routine and/or well-defined tax law information through telephone or in person. Ensures the wait for service does not exceed office standards. Assists taxpayers in the completion of the most basic sales and use tax returns & BT-111s. Assists taxpayers in filing for relief of penalty, certification of timely returns or requests for extensions. Handles all incoming mail and processes outgoing mail. Handles registration assignments through the agency's database: Centralized Revenue Opportunity System (CROS). Processes security and tax returns received.
35%	Contacts taxpayers on delinquent accounts and/or billings of lesser amounts. Explains the nature of the delinquency or billing. Elicits reasons for taxpayers' failure to file or pay. Obtains a verbal estimation of taxable sales in the event an estimated return becomes necessary to clear a delinquency. Obtains a commitment date for filing a return and/or payment of the balance. Provides information on taxpayer's legal obligation to file and pay. Explains the consequences for non-compliance. Establishes appropriate follow ups and makes contact when necessary. Reviews CROS and other sources to perform skip tracing to locate missing taxpayers. Documents activities in CROS, or when a delinquent account or billing is not in CROS, in a manner directed by management. Recommends referral to a collector when an estimated return is needed to clear the delinquency or when collection action is needed to clear the account balance.
20%	Updates address and company name changes and account closures including appropriate follow up actions. Adjusts and processes requests for account changes that are generated within the office. Track, work, and follow up on returned mail by contacting the taxpayer, looking up forwarding addresses and doing basic skip tracing to locate updated addresses. Acts as a Remote Agent, responding to general information calls, responding to inquiries, performing basic registration updates, and providing return filing and other online services assistance.

5%

MARGINAL JOB FUNCTIONS

Performs other job-related duties as required.

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

- May work in a high-rise building

Physical Abilities:

- Ability to remain in a stationary position, consistent with office work, for extended periods of time
- Ability to access and use a personal computer, office equipment, and/or telephone daily
- Ability to transfer and transport materials up to 30 pounds with or without assistance

Additional Requirements/Expectations:

- Travel to meet training requirements, may include overnight for more than one day
- Travel to complete mail processing duties
- Must be flexible and willing to adjust to changing work schedules, if required, for 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: 09/20/22 SW

C&P Analyst Initials: RD