

California Department of Tax and Fee Administration

DUTY STATEMENT

CURRENT
 PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION Business Taxes Representative		WORKING TITLE Business Taxes Representative	
DIVISION/OFFICE/UNIT External Affairs Division/Customer Service Center		SPECIFIC LOCATION ASSIGNED TO	
SEERA DESIGNATION Rank and File	BARGAINING UNIT R01	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) 291-316-8690-	

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 a Business Taxes Administrator I, the Business Taxes Representative learns all phases of tax compliance, licensing, and law, rule, and regulation administration. The incumbent provides advisory services to department staff, the public, and taxpayers concerning the various tax programs administered by the California Department of Tax and Fee Administration (CDTFA). The incumbent is responsible for training new and existing Customer Service Representatives (CSR), and reviewing their completed assignments for accuracy to ensure compliance with sales and use tax laws, rules, and guidelines provided by the CDTFA. The incumbent responds to questions concerning online services or other account-specific questions and prepares written responses to the public or other government agencies via telephone, e-mail, Live Chat, or other means. The incumbent works with the Information Technology Division (TSD) staff on troubleshooting personal computer and telephone issues. The incumbent serves as the internal representative responsible for contacting Investigations or Internal Security and Audit Bureau concerning accounts that have been flagged. The incumbent may be required to travel, including overnight, up to ten percent (10%) of the time, to attend and conduct training.

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 advisory services and educates taxpayers on the various programs administered by the CDTFA, including programs requiring regulatory changes; assists with the preparation of sales and use tax returns, applicable reporting forms and schedules, and CDTFA Online Services; reviews existing call center procedures to ensure compliance with disclosure requirements for release of information.
40%	Assigns, reviews, and tracks non-call work provided to new CSRs receiving training, including review of closeouts, account maintenance, and other non-call work. Provides guidance on the Agent Assistance line and assists CSRs with account maintenance, collection of payments in full and/or payment plans of amounts due, CDTFA Online Services, and reviewing account information to determine what action is necessary.
15%	Provides in-depth training and instruction on the interpretation and application of the sales and use tax laws rules, regulations, and statutes to new and current team members. Prepares written correspondence and analysis for management or other CDTFA staff in response to inquiries made to elected officials, executive management, and the public. Responds to taxpayer inquiries by email and Live Chat. Reviews and routes referrals completed by CSRs to the appropriate department for further assistance. Contacts Investigations or Internal Security and Audit Bureau concerning accounts that have been flagged. Serves as a backup to the Business Taxes Compliance Specialist in call monitoring and evaluations for team members. Works with TSD staff with troubleshooting PC/Phone issues.
5%	<u>MARGINAL JOB FUNCTIONS</u> 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
- Professional office setting with open floor plan

Physical Abilities:

- Ability to transport materials weighing up to thirty (30) pounds
- Ability to access and use a personal computer, office equipment, and/or telephone daily
- Ability to remain in a stationary position, consistent with office work, for extended periods of time

Additional Requirements/Expectations:

- Travel may be required up to ten percent (10%) to complete training requirements
- Overtime may be required to meet operational needs
- Late phone coverage may be required 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
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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
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HRB Approval Date: 07/07/2023

C&P Analyst Initials: AB