

California Department of Tax and Fee Administration

DUTY STATEMENT

☐ CURRENT
☒ PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS Monday - Friday; 8:00am - 5:00pm		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION Business Taxes Representative		WORKING TITLE SCOP Representative	
DIVISION/OFFICE/UNIT FOD / San Jose Field Office		SPECIFIC LOCATION ASSIGNED TO San Jose , CA	
SEERA DESIGNATION Rank and File	BARGAINING UNIT 01	WORK WEEK GROUP 2	CERTIFICATES REQUIRED None
FINGERPRINTS/BACKGROUND CHECK REQUIRED <input checked="" type="checkbox"/> <input type="checkbox"/>	BILINGUAL POSITION <input type="checkbox"/> <input checked="" type="checkbox"/>	SUPERVISION EXERCISED None	
INCUMBENT		POSITION NUMBER (Agency-Unit-Class-Serial) 291-073-8690-	

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 (BTA) I, the Business Taxes Representative (BTR) performs business inspections to verify accurate tax reporting under the Statewide Compliance and Outreach Program (SCOP). The BTR conducts field observations, performs routine case reviews, prepares investigation reports, and assists in identifying underreporting and unregistered businesses. When reporting deficiencies are encountered, the incumbent solicits amended tax returns and, with the direction of the Business Taxes Specialist (BTS) I, prepares routine audit leads for review. The incumbent provides advisory information to business owners to ensure they understand how the tax laws, rules, and regulations apply to their specific industry and refers business owners to the BTA I or the BTS I when more complex help is necessary. The duties performed by this position are primarily carried out in the field.

This position may be considered for rotational duties within the same classification.

Travel overnight up to 50% of the time and work in the field at least 80% of the time.

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

PERCENTAGE OF TIME SPENT	DUTIES
60%	<u>ESSENTIAL JOB FUNCTIONS</u> Conducts general field inspections over a large geographical area of all types of businesses selling or consuming tangible personal property in this state. Verifies businesses are complying with all Sales and Use Tax Laws, Rules and Regulations. With the assistance of the BTS I and the BTA I, determines the proper investigative techniques and procedures to use in conducting routine inspections. Conducts interviews of individuals regarding proper permit/license registration and accurate tax reporting. Documents field observations, interviews, and inspection findings. Provides assistance to taxpayers including effectively communicating and explaining general tax laws to encourage voluntary compliance. Refers taxpayers to the BTA I or BTS I when more complex issues arise. Provides general information, literature, and forms to taxpayers as needed. Prepares detailed after-action reports of non-compliance and recommends or takes appropriate action(s) to correct the situation.
25%	With the assistance of the BTA I and the BTS I, solicits amended tax returns and develops audit leads when an underreporting situation is encountered. Assists the BTS I with following up on, analyzing, and determining the next actions on amended tax returns and/or audit leads. Searches websites for discovery leads and completes field observations of problem industry businesses with the use of a non-audio camera for short-term surveillance.
10%	Performs non-field investigations of accounts. Directs or performs account maintenance and permit issuance activities.

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5%

MARGINAL JOB FUNCTIONS

Participates in the seizure of inventory of problem industry businesses. Performs other duties as needed, including attendance at staff meetings and training classes, taxpayer outreach activities, training assistance, and collating statistics.

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

- May work in a high-rise building
- Daily travel over a wide geographical area
- Traveling door-to-door to perform business visits on a regular basis, at times in inclement weather

Physical Abilities:

- Travel regularly transporting a tablet PC in the field over a wide geographical area, up to several miles and for an extended period of time
- Transfer and transport materials up to 30 pounds with or without assistance
- Work long and irregular hours that may include weekends in the field at various geographical locations within the state

Additional Requirements/Expectations:

- Travel, which may include overnight

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: 11/4/2024 SW

C&P Analyst Initials: AT