

# California Department of Tax and Fee Administration

## DUTY STATEMENT

CURRENT  
 PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION <b>Tax Technician I</b>		WORKING TITLE <b>Tax Technician</b>	
DIVISION/OFFICE/UNIT <b>PPDD/HOB/Consumer Use Tax Section</b>		SPECIFIC LOCATION ASSIGNED TO	
SEERA DESIGNATION <b>Rank and File</b>	BARGAINING UNIT <b>04</b>	WORK WEEK GROUP <b>02</b>	CERTIFICATES REQUIRED <b>None</b>
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 <b>None</b>	
INCUMBENT		POSITION NUMBER (Agency-Unit-Class-Serial) <b>291-474-1973-</b>	
<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>POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS</p> <p>Under the close supervision of the Business Taxes Administrator (BTA) I, the Tax Technician (TT) I performs the less difficult and less complex technical duties of the TT series. The incumbent is responsible for the initial screening of all source documents received from various departments' divisions and other third-party agencies to determine if a possible use tax liability exists on private party purchases of vehicles, vessels, aircrafts, and mobile homes purchased from non-dealers. The source document(s) with additional third-party and customer information obtained by the incumbent, either by written correspondence, phone or email, will determine if a contact letter should be sent or a billing should be issued. The incumbent assists with reviewing the less difficult and less complex exemption claims. The incumbent also performs other support duties.</p> <p><b>Candidate must be able to perform the following essential job functions with or without reasonable accommodation.</b></p>			
PERCENTAGE OF TIME SPENT	DUTIES		
50%	<p><b><u>ESSENTIAL JOB FUNCTIONS</u></b></p> <p>Based on written guidelines and procedures, identifies those source documents that meet selection criteria and are required to be registered into the department's registration system. Reviews third-party registration records and other information received from various outside sources, including but not limited to assisting in gathering evidence for establishing nexus in California to determine liability for use taxes. Determines if there is an intervening transaction. Reviews the less difficult and less complex exemption claims to determine the appropriate course of action. Identifies the correct name, owner type, address, and tax rate to initiate registration.</p>		
40%	<p>As appropriate, enters the required data into the registration system to create an account, and takes appropriate action based on the original screening. Requests initial contact letter or tax shortage billing. Scans and uploads registration source documents into the system. Identifies and forwards leads requiring further review to the appropriate lead person. Creates and verifies use tax clearance certificates for vehicles, vessels, mobile-homes, or commercial coaches, as requested. Researches and establishes estimated values of vehicles, vessels, or aircraft using various tools available.</p>		
5%	<p>Updates account address changes and processes department team members' requests for third-party data from various state agencies.</p>		
5%	<p><b><u>MARGINAL JOB FUNCTIONS</u></b></p> <p>Performs other job-related duties, as required, based on operational needs, which includes assisting with the training of other team members at the TT I, Office Assistant, and Office Technician levels and attending training and meetings.</p>		
<b>WORK ENVIRONMENT OR PHYSICAL ABILITIES REQUIRED FOR THE JOB (if applicable):</b>			
<p><b>Work Environment:</b></p> <ul style="list-style-type: none"> <li>Depending on your work location, you may be working in a high-rise building.</li> </ul>			

**Physical Abilities:**

- Ability to access and use a laptop, office equipment and/or telephone system 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 five percent (5%) of the time.

***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: 5/5/2026**

**C&P Analyst Initials: ANS**