

# California Department of Tax and Fee Administration

## DUTY STATEMENT

CURRENT  
 PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION <b>Business Taxes Representative</b>		WORKING TITLE <b>Tax Representative</b>	
DIVISION/OFFICE/UNIT <b>BTFD/Audit &amp; Carrier Bureau/Motor Carrier Office</b>		SPECIFIC LOCATION ASSIGNED TO	
SEERA DESIGNATION <b>Rank and File</b>	BARGAINING UNIT <b>01</b>	WORK WEEK GROUP <b>2</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>No</b>	
INCUMBENT		POSITION NUMBER (Agency-Unit-Class-Serial)	
<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 close supervision of a Business Taxes Administrator I, the Business Taxes Representative locates and contacts individuals and representatives of organizations either by telephone, mail, or in person to obtain information and ensure compliance with the applicable tax laws and agreements administered by the California Department of Tax and Fee Administration. This position requires both in-state and out-of-state travel up to fifteen percent (15%) of the time participating in roadside compliance enforcements in the California Highway Patrol Inspection Facilities, Department of Agriculture Inspection Stations, and at other Truck Check Programs at remote locations throughout California</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		
45%	<p><b><u>ESSENTIAL JOB FUNCTIONS</u></b></p> <p><b><u>Collection:</u></b> Processes accounts receivable workload, corresponds with taxpayers, prepares and services withhold notices, notices of levy, and requests recordation of certificates of lien authorized by statute. Performs skip tracing and other collection functions as required. Provides assistance needed by other state agencies to perform these functions.</p> <p><b><u>Revocation:</u></b> Enforces the provisions of the tax laws pertaining to revoked licenses. Reinstates license(s) of those licensees who have complied with the requirements for reinstatement. Manages the recordation of revocations, citations, fines, and the disposition of seized and/or sold vehicles. Updates other base jurisdictions of the new revocation and reinstatements of licensees.</p>		
45%	<p><b><u>Investigation:</u></b> Provides assistance to the technical team members in handling the more difficult return delinquency problems, account maintenance changes, account registration, billing of tax liabilities, and review of reported exempt transactions.</p> <p><b><u>Compliance:</u></b> Provides advisory services and taxpayer education. Assists with the preparation of returns and reporting forms. Provides support and information to the field and headquarter offices, other state, local, and private entities regarding tax programs.</p>		
5%	<p><b><u>Registration:</u></b> Initiates the registration of new taxpayers, evaluates the qualification of requests for license renewal, identifies legal owners, and ascertains if there is a need to require the posting of security. Forwards closing licensee accounts to be reviewed for audit consideration.</p>		

5%	<p><b><u>MARGINAL JOB FUNCTIONS</u></b></p> <p>Performs other job-related duties, as required.</p>
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**WORK ENVIRONMENT OR PHYSICAL ABILITIES REQUIRED FOR THE JOB** *(if applicable):*

**Work Environment:**

- Depending on your work location, you may be working in a high-rise building.

**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.
- Ability to transport materials weighing up to thirty (30) pounds, with or without reasonable accommodations.

**Additional Requirements/Expectations:**

- Travel may be required up to fifteen percent (15%) of the time, and may include evenings, weekends, and/or overnight travel.

***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: 05/05/2026	C&P Analyst Initials: LLM
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