

California Department of Tax and Fee Administration

DUTY STATEMENT

☐ CURRENT
☐ PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION Tax Technician II		WORKING TITLE Tax Technician II	
DIVISION/OFFICE/UNIT Office of the Director/ Taxpayers' Rights Advocate Office		SPECIFIC LOCATION ASSIGNED TO	
SEERA DESIGNATION Rank and File	BARGAINING UNIT 04	WORK WEEK GROUP 2	CERTIFICATES REQUIRED None
FINGERPRINTS/BACKGROUND CHECK REQUIRED ☒ Yes ☐ No	BILINGUAL POSITION ☐ Yes ☒ No	SUPERVISION EXERCISED None	
INCUMBENT		POSITION NUMBER (Agency-Unit-Class-Serial) 291-309-1974-	
<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>			
POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS Under general supervision of the Business Taxes Administrator II, Taxpayers' Rights Advocates (TRA) Office, the Tax Technician (TT) II learns and performs more complex technical duties. The incumbent will perform a wide variety of routine advisory services to taxpayers and other governmental agencies by phone or in writing and is responsible for performing a variety of technical functions for the TRA Office. The TT II may be the taxpayers' first point of contact with the TRA Office and must exercise tact, empathy, and good judgment. The TT II is responsible for working on technical assignments or assisting team members in communicating with taxpayers. On a routine basis, the TT II will assist team members with research on taxpayer account history and will perform other related duties as necessary. Candidate must be able to perform the following essential job functions with or without reasonable accommodation.			
PERCENTAGE OF TIME SPENT	DUTIES		
55%	<u>ESSENTIAL JOB FUNCTIONS</u> Assist taxpayers and TRA Office team members on routine taxpayer contacts. On a regular basis, the TT II will work taxpayer accounts by discussing the problem with the taxpayer, establishing a taxpayer profile in the TRA database, reviewing the case in CROS, contacting all necessary division(s) or section(s) for appropriate information, and resolving the taxpayer's issue.		
30%	Conduct preliminary information gathering from taxpayer accounts and entering items into the database to ensure complaint issues are thoroughly documented.		
10%	Conduct general record keeping, process incoming/outgoing mail and email, update CROS, and maintain taxpayer files per TRA Office guidelines. Maintain and monitor the Clearance Log.		
5%	<u>MARGINAL JOB FUNCTIONS</u> Provide guidance/assistance to other members of the Division administrative support staff as needed. Performs other job-related duties as needed.		
WORK ENVIRONMENT OR PHYSICAL ABILITIES REQUIRED FOR THE JOB (if applicable):			
Work Environment: May work in a high-rise building			
Physical Abilities: - 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			

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Additional Requirements/Expectations: •		
<i>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.</i>		
PRINT EMPLOYEE NAME	EMPLOYEE'S SIGNATURE	DATE
<i>I certify that the above accurately represents the duties of the position and that I have reviewed these duties with the above named employee.</i>		
PRINT SUPERVISOR NAME	SUPERVISOR'S SIGNATURE	DATE
HRB Approval Date: 6/9/2026	C&P Analyst Initials: AB	