

California Department of Tax and Fee Administration DUTY STATEMENT

☐ CURRENT
☐ PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION Tax Technician III		WORKING TITLE Tax Technician - Collector	
DIVISION/OFFICE/UNIT Field Operations Division /		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 - - 1975 -	
<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 direction of the Business Taxes Administrator (BTA) I, the Tax Technician (TT) III serves as an experienced staff resource and performs the most difficult and complex tax technician duties. The Tax Technician III assists taxpayers to ensure compliance with tax laws and performs a variety of collection functions. The incumbent initiates, responds, and resolves compliance inquiries from taxpayers involving active, delinquent, closed, and revoked sales and use tax cases. Travel may be required up to 5% of the time for training purposes. The incumbent may be eligible to receive additional compensation each month for public contact through the telephone per Pay Differential 186. 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> Initiates contact with tax and fee debtors to collect monies owed and arrange for filing and payment of delinquent returns. Obtains commitments to clear delinquencies or taxes due. Establishes appropriate follow-ups and makes timely contacts. Reinstates selected revoked accounts. Reviews accounts for adequate security and completes any appropriate miscellaneous account changes. Recognizes and takes appropriate action on ownership changes. Performs account maintenance to update addresses, ownership, and proper reporting basis. Determines if an account needs to be closed out. Prepares write-offs on selected uncollectible accounts under specific dollar criteria. Completes documentation on bankruptcies and reviews bankruptcy court records. Contact debtors, trustees and attorneys on assigned cases. Reviews taxpayer's account profile and determines the best skip tracing methods and resources to be utilized such as telephone, internet, credit reports, external agency information, voter registration, etc. to locate tax debtors and their attachable assets. Recommends issuance of levies, earnings withholding orders, warrants for collection, successor billings and estimated return Assessments to clear delinquencies. Gathers and reviews taxpayer financial documents and arranges installment payment proposals for approval by BTA I. Reviews collection cases with the BTA I after a designated period if when collection efforts are unsuccessful or technical assistance is needed. Documents activities as outlined in CPMG Section 105.000 in a manner directed by the Field Operations Division.		

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40%	Responds to inquiries from a dedicated taxpayer telephone line regarding delinquencies and filings, Notices of Proposed Liabilities, Notices of Determination, and other accounts receivable assignments. Analyzes accounts and provides resolution to taxpayer inquiries by assisting taxpayers with their collection actions to resolve delinquency cases, and account reinstatements. Helps the taxpayer with any account maintenance needs, including ownership changes and account close outs. Provides appropriate technical assistance to taxpayers regarding the filing and payment of their tax returns. Assists the taxpayer with matters resolving levies on their bank accounts, earning withholding orders and other determinations. Coordinates payment plans with the taxpayer and arranges Installment Payment Agreements. Reviews cases with BTA I to ensure actions taken are appropriate. Documents all activities into CROS as directed by Field Operations Division.
15%	Acts as a remote agent, assisting taxpayers with questions and online services through our toll free remote telephone lines. Reads all operational memos, law changes, and attends training classes to remain current on laws, regulations, policies and procedures.
5%	<u>MARGINAL JOB FUNCTIONS</u> Performs other job-related duties to cover the workload.

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

- May work in a high-rise building

Physical Abilities:

- Ability to transport materials weighing up to thirty (30) pounds with or without reasonable accommodations
- 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 to meet training requirements, 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
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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: 07/21/25 **C&P Analyst Initials: TP**