

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	
DIVISION/OFFICE/UNIT BTFD/PCB/RRPB/Registration & Licensing Section		SPECIFIC LOCATION ASSIGNED TO Sacramento, CA - Headquarters	
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 - 517 - 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 the general supervision of the Business Taxes Administrator (BTA) I, the Tax Technician (TT) II performs complex technical duties related to registration, account maintenance, and close-outs. The TT applies in-depth knowledge of registration processes, return review, accounts receivable, and delinquency control. The TT responds to incoming telephone calls from the department's Customer Service Center telephone system and registers taxpayers for the programs administered by the department. The TT contacts licensees and taxpayers regarding department policies and procedures to ensure compliance with registration requirements across various tax and fee programs. This position requires a higher level of judgment, initiative, and independence than expected at the TT I level. The incumbent may be eligible to receive additional compensation each month for public contact by 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		
50%	<u>ESSENTIAL JOB FUNCTIONS</u> Customer Service, Registration, and Account Support • Responds to general information calls through the department's phone system and addresses routine tax program inquiries. • Clarifies requirements and procedures for a wide range of tax programs. • Processes registrations and renewals, including reviewing supplemental documentation such as lease agreements, bills of sale, and depreciation schedules. • Provides assistance with tax return filing, tax payments, account maintenance, and permit and license close-outs, both over the phone and within the department's software systems. • Prints, reviews, faxes, and mails forms upon request. • Uses desk reference manuals, official publications, and other resources to accurately respond to inquiries. • Handles more complex calls from taxpayers, the general public, and external government entities.		
45%	Account Maintenance, Investigations, and Administrative Support • Processes account maintenance requests and account close-outs. • Conducts skip-tracing activities to locate and identify correct legal ownership. • Verifies and validates registered and potential taxpayer lists received from lead sources. • Processes inquiries received verbally and in writing. • Handles returned mail, makes outbound calls to clarify questionable registrations or renewals and obtains updated taxpayer contact information. • Performs mail distribution and provides back-up clerical support. • Assists in training lower-level Tax Technicians.		

POSITION NUMBER (Agency-Unit-Class-Serial) 291 - 517 - 1974 -		Page 2 of 2
5%	<u>MARGINAL JOB FUNCTIONS</u> Performs other job-related duties, as required.	
WORK ENVIRONMENT OR PHYSICAL ABILITIES REQUIRED FOR THE JOB <i>(if applicable):</i>		
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.		
Additional Requirements/Expectations: Travel may be required up to five percent (5%) of the time.		
<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: 07/29/2026	C&P Analyst Initials: LLM	

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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 - 517 - 1973 -	
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POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS Under the close supervision of the Business Taxes Administrator (BTA) I, the Tax Technician (TT) I, performs the less difficult and complex technical tasks. The TT I must obtain and utilize knowledge of registration, return review, accounts receivable, and delinquency control process. The position is responsible for reviewing account files, correspondence, and documents to determine the appropriate actions. The Tax Technician responds to incoming calls through the department's Customer Service Center telephone system and registers taxpayers for various tax programs administered by the department. The incumbent is responsible for contacting licensees and taxpayers regarding department policy and procedures to ensure compliance with registration requirements for the department's various tax and fee programs. The incumbent may be eligible to receive additional compensation each month for public contact by 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		
50%	<u>ESSENTIAL JOB FUNCTIONS</u> Customer Service, Registration & Program Support • Responds to general information calls from the department's phone system. • Answers routine inquiries on tax program requirements, procedures, and operations. • Performs taxpayer registration and renewals, including reviewing supplemental documentation such as lease agreements, bills of sale, and depreciation schedules. • Assists taxpayers with return filing, tax payments, account maintenance, and permit/license closures, and system navigation. • Prints, reviews, faxes, and mails forms upon request. • Uses desk reference manuals, official publications, and other resources to respond to inquiries. • Handles the less complex calls from the public, taxpayers, and government entities.		
45%	Account Maintenance, Investigative Activities & Clerical Support • Processes account maintenance requests and permit/license close-outs. • Performs basic skip tracing activities to identify and verify legal ownership. • Verifies and validates lists of registered and potential taxpayers received from lead sources. • Processes incoming verbal and written inquiries. • Processes returned mail. • Makes outbound phone calls to resolve questionable registrations/renewals and obtain updated contact information. • Performs mail distribution and provides backup clerical support.		

POSITION NUMBER (Agency-Unit-Class-Serial) 291 - 517 - 1973 -		Page 2 of 2
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