

California Department of Tax and Fee Administration

DUTY STATEMENT

CURRENT
PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION Tax Technician I		WORKING TITLE Tax Technician I	
DIVISION/OFFICE/UNIT External Affairs Division/Customer Service Center		SPECIFIC LOCATION ASSIGNED TO Sacramento, CA - Headquarters	
SEERA DESIGNATION Rank and File	BARGAINING UNIT R04	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) 291-316-1973-	
<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 close supervision of the Business Taxes Administrator I, the Tax Technician I learns and performs the less difficult and complex technical tasks. This includes, but is not limited to, responding to routine telephone inquiries regarding business tax laws and regulations, California Department of Tax and Fee Administration (CDTFA) policies and procedures, and general business information received from CDTFA's toll-free number; performing account maintenance duties; providing taxpayer assistance with registration, tax returns, tax payments, and guidance to available CDTFA resources; accessing and reviewing confidential taxpayer information; review, process, and track returned CDTFA mail; reviewing and processing various CDTFA forms and/or taxpayer correspondence; utilizing an effective approach in handling difficult or irate taxpayers over the phone; contacting taxpayers by phone in order to obtain the most current contact information; and performing other job-related duties as required while adhering to Customer Service Center's office procedures. Travel may be required up to five percent (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		
75%	<u>ESSENTIAL JOB FUNCTIONS</u> Responds to general information calls from the CDTFA's toll- free number; responds to routine tax program inquiries that do not require knowledge of auditing standards and regulatory interpretation/debate; clarifies program requirements on a variety of tax program procedures and operations; performs basic registration, tax return, account maintenance, and permit close out assistance to taxpayers over the phone; prints, reviews, faxes and/or mails out CDTFA tax returns, permits, publications, and forms to taxpayers upon request; utilizes an online desk reference manual, official CDTFA publications, and other CDTFA resources in responding to inquiries; handles the less complex calls from the general public, taxpayers, and private governmental entities.		
20%	Processes account maintenance requests and close outs; reviews, processes, and tracks returned CDTFA mail; makes outbound phone calls to taxpayers to obtain current contact information; tracks and reports on phone contacts and changes made to accounts; performs fax duties and mail distribution; answers incoming office phone lines; performs back up clerical functions.		
5%	<u>MARGINAL JOB FUNCTIONS</u> Documents telephone and written inquiries for which standard responses have not been developed or included in the SharePoint reference manual (the Queue) and refers these questions to program management for follow-up with tax program staff. Performs other job-related duties to cover workload as needed.		

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

- May work in a high-rise building
- Vacation/leave usage may be restricted during designated peak periods

Physical Abilities:

- Ability to access and use personal computer, office equipment, and telephone daily
- Ability to communicate via telephone for extended periods of time
- Ability to remain in a stationary position, consistent with office work, for extended periods of time
- May work mandatory overtime, as required

Additional Requirements/Expectations:

- Travel may be required up to five (5) percent of the time, for training purposes
- Must be punctual and dependable
- Regular attendance is required

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: 11/05/2025

C&P Analyst Initials: JB