

California Department of Tax and Fee Administration DUTY STATEMENT

☒ CURRENT
☐ PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION Business Taxes Specialist I		WORKING TITLE Business Taxes Specialist	
DIVISION/OFFICE/UNIT PPDD/TPB/CSTS/Compliance Policy Unit		SPECIFIC LOCATION ASSIGNED TO	
SEERA DESIGNATION Rank and File	BARGAINING UNIT 01	WORK WEEK GROUP 2	CERTIFICATES REQUIRED None
FINGERPRINTS/BACKGROUND CHECK REQUIRED ☒ Yes ☐ No	BILINGUAL POSITION ☐ Yes ☒ No	SUPERVISION EXERCISED May act as lead	
INCUMBENT		POSITION NUMBER (Agency-Unit-Class-Serial) 291 - 473 - 4380 -	
<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 a Business Taxes Administrator II, the Business Taxes Specialist (BTS) I, Compliance Policy Unit, is responsible for independently completing assignments that are complex or sensitive in nature as requested by the section supervisor and Processing, Policy, and Data Division (PPDD) management. 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> Acts as a highly skilled, technical specialist on area wide or statewide compliance practices, policies, and procedures. In this role, the BTS I directs, coordinates, and controls difficult projects to include determining the project scope and methodology. These projects may have overlapping audit, compliance, administrative, and legal issues. As a project leader, the BTS I makes decisions, plans, organizes, and directs the work of others; independently researches and resolves complex and comprehensive tax and compliance program issues; interprets policies and assists in establishing or modifying programs or policies; develops and provides written procedures to the statewide compliance team members; and, provides advice to PPDD and other California Department of Tax and Fee Administration (CDTFA) management on proposed statutory, policy, and procedural changes.		
30%	Reviews statutory and administrative changes to law, departmental policies, and procedures. Identifies areas requiring development of new material or revision of existing material contained in the department's technical manuals, pamphlets, operations memos, special notices, and other publications. Develops new material and revises existing material contained in these publications to ensure up-to-date information is available and distributed in a timely manner. Coordinates clearance and distribution of prepared material to affected stakeholders. Acts as a highly skilled technical specialist on the plans, practices, and policies of the PPDD.		
15%	Acts independently to research and evaluate highly technical, complex, and sensitive legal and compliance problems which field office Administrators or Headquarters managers are unable to resolve. Consults with the Legal Division to resolve complex and unique legal issues. Responsible for formulating solutions to these legal and compliance problems and preparing reports with recommendations and alternatives for action, as required, to PPDD management.		
10%	Independently researches and prepares suggested responses to complex legal and compliance questions raised by taxpayers, other states, multi-state tax commission, other groups, or associations, for CDTFA executive management, and elected officials. Includes preparing requests for guidance from the Legal Division on issues where research does not disclose adequate reference to draw a legally supportable conclusion or recommendation. Responds, verbally and/or in writing, to questions from executive management, the media, taxpayers, and others regarding a wide range of law and policy topics. Represents		

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5%

higher level of authority at meetings, conferences, and hearings and acts as liaison between the PPDD and other government agencies. Makes recommendations and prepares reports based on results of meetings and conferences.

MARGINAL JOB FUNCTIONS

Performs other job-related duties as required.

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 transport materials up to twenty five (25) pounds, with or without reasonable accommodation.
- Ability to remain in a stationary position, consistent with office work, for extended periods of time.
- Ability to access and use a laptop, office equipment, and/or telephone system daily.

Additional Requirements/Expectations:

- Travel may be required up to five percent (5%) of the time.

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: 10/6/2025**C&P Analyst Initials: JVR**