

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 TSD/CROS/E-Services 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)	
<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) II, the Business Taxes Specialist (BTS) I is responsible for independently performing difficult, specialized and highly complex duties projects or assignments. The incumbent also provides technical and development guidance for Centralized Revenue Opportunity System (CROS) online services and legacy online services to a group performing a wide variety of complex and sensitive assignments for the California Department of Tax and Fee Administration (CDTFA). The incumbent is independently responsible for completing assignments of the most complex or sensitive in nature as requested by the E-Services Administrator or CROS Bureau Chief. Candidate must be able to perform the following essential job functions with or without reasonable accommodation.			
PERCENTAGE OF TIME SPENT	DUTIES		
60%	<u>ESSENTIAL JOB FUNCTIONS</u> Leads project teams comprised of Subject Matter Experts (SMEs) from various business program areas to incorporate legislative changes which will require the conceptual development/enhancement of CROS or legacy online services for the benefit of CDTFA tax and fee payers. Analyze assignments and projects to make recommendations to executive and bureau management on the feasibility, impact and priority of the business solutions and their effect on internal and external stakeholders. Create action plans, conceptual requirements, and identify/address the effects that these changes may have on CROS online services, other systems or business areas and external users. Incumbent is further responsible for (but not limited to): - Track business resources and time spent on project tasks. - Develop user acceptance testing (UAT) scenarios, testing, and the oversight of the UAT process. - Develop and/or update CDTFA website information. - Develop and/or write training materials, scripts for video tutorials, and deliver training material to CDTFA members or management in a classroom setting. - Develop help text, error messages, and other pertinent information for online services. - Prepare information for internal and external users via email, paper, or the CDTFA website.		
25%	Independently researches and resolves customer and system issues either in writing or verbally. Prepares responses (both verbally and/or in writing) to the most complex and sensitive questions related to online services raised by tax and fee payers, CDTFA members, management or executives, other state agencies, multi-state tax commissions, or other groups and associations.		
10%	Makes presentations and represents the CDTFA at external meetings, conferences, and seminars. Makes presentations and provides Online Services demonstrations to CDTFA members and management. Serves as a SME for Online Services related issues.		
5%	<u>MARGINAL JOB FUNCTIONS</u> Acts for the unit or section supervisor as directed; represents the department and section at meetings, hearings, and conferences; provides necessary guidance to section staff. Perform other job-related duties as required.		

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

- Position may be located in a high-rise building
- Climate controlled office under artificial lighting with occasional fluctuations in temperature
- Team member will work in a cubicle and periodically attend meetings and/or training outside of their assigned office
- Daily access and use of a personal computer, office equipment and telephone are essential

Physical Abilities:

- Ability to transport materials, including boxes, weighing up to twenty-five (25) pounds with or without reasonable accommodations.

Additional Requirements/Expectations:

- Travel required up to five (5) percent 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 TEAM MEMBER NAME

TEAM MEMBERS'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: 01/09/2026

Approvers Initials: LLM