

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 III - Lead	
DIVISION/OFFICE/UNIT Field Operations Division/		SPECIFIC LOCATION ASSIGNED TO , CA	
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 the general direction of the Business Taxes Administrator (BTA), I, the Tax Technician (TT) III Lead, serves as an experienced resource and performs the most difficult and complex technical duties, which may include, but are not limited to, issuing permits to businesses, handling the full range of account maintenance duties, and conducting taxpayer interviews. The incumbent may issue use tax exemption certificates, process escrow clearances for business sales, handle incoming and released security, and perform reception duties. Additionally, the incumbent oversees the public counter operation, ensuring work is processed in a timely and orderly manner, adjusting coverage daily, and providing training. Travel may be required up to 5% of the time for training purposes. <i>This position is designated to receive additional compensation each month per Pay Differential 186, which will require the team members to perform taxpayer counter services at least 50 percent (50%) of the time. This includes assisting taxpayers with registration, escrow services, cashier services, account maintenance, and filing returns over the phone, online, or in person, and assisting taxpayers on calls received through the Customer Service Center/800 Number, Collection Split Line.</i>			
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 in a lead capacity over other Tax Technicians performing taxpayer registration duties. Reviews and monitors workflow to ensure timely completion of assignments and maintains adequate staffing at the public counter. Performs or assists with the most complex counter situations. Trains and provides technical support to less experienced team members. Disseminates new or changing procedural information. Reviews existing procedures to determine effectiveness and submits proposed changes to the supervisor. Assists taxpayers with online services to register for permits, update accounts, or respond to collection inquiries.		
35%	Contacts taxpayers regarding delinquent accounts and arranges for the filing and payment of returns. Explains the nature of the delinquency and asks for delinquent returns to be filed. Provides taxpayers with deadlines for filing returns and/or payment for the balance. Educates taxpayers about the legal obligation to file and pay. Explains the consequences for non-compliance. 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 for selected uncollectible accounts based on specific dollar thresholds. Documents activities in the Centralized Revenue Opportunity System (CROS). 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 plans. Reviews collection cases with the BTA I after a designated period if collection efforts are unsuccessful or technical assistance is needed. Documents all activities in CROS as directed by the Field Operations Division (FOD).		

20%

Reviews and prepares documentation in support of claims of exemption and adjustment. Requests additional documents from taxpayers when further information is required. Answers tax law inquiries and refers taxpayers to applicable publications and industry guides as needed. Reads all operational memos, law changes, and attends classes to remain current on laws, regulations, policies, and procedures. Uses basic interview techniques to identify accounts that require security deposits. Responds to inquiries regarding security requirements and pending releases. Receives and securely stores all negotiable security documents. Enters security information in CROS. Applies security to established tax liabilities as directed. Processes all daily monetary transactions within the office using the cashiering system in CROS. Transfers funds in accordance with the prescribed policy. Issues receipts to taxpayers. Prepares payment transmittal documents and the bank deposits and electronically transmits reports to the Headquarters Cashier Unit. Ensures the cashiering function operates in accordance with current agency fiscal policy.

MARGINAL JOB FUNCTIONS

5%

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. Performs other job-related duties to cover the workload.

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

- May work in a high-rise building
- Standard office environment
- Parking varies by location

Physical Abilities:

- Remain in a stationary position for extended periods of time to meet operational needs and critical deadlines.
- Use a computer/laptop, office equipment, and telephone daily.
- Ability to transfer and transport materials, supplies, and equipment weighing up to thirty (30) pounds with or without reasonable accommodation.

Additional Requirements/Expectations:

- Travel may be required to meet training requirements, which may include overnight.
- Must be flexible and willing to adjust to changing work schedules, if required, for operational needs.

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: 2/23/2026

C&P Analyst Initials: TP