

California Department of Tax and Fee Administration

DUTY STATEMENT

CURRENT
PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION Business Taxes Representative		WORKING TITLE Business Taxes Representative	
DIVISION/OFFICE/UNIT External Affairs Division/Customer Service Center		SPECIFIC LOCATION ASSIGNED TO Headquarters (Sacramento), Oakland, Redding, Riverside, Santa Rosa and Ventura, CA	
SEERA DESIGNATION Rank and File	BARGAINING UNIT R01	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) 291-316-8690-	
<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 a Business Taxes Administrator I, the Business Taxes Representative learns all phases of tax compliance, licensing, and the administration of laws, rules, and regulations. The incumbent prepares trainees to respond to taxpayer inquiries received at the California Department of Tax and Fee Administration (CDTFA) call center and performs a range of compliance duties that require knowledge of the various tax laws and programs administered by the CDTFA. The incumbent assists staff, the public, and taxpayers with the various tax programs administered by the CDTFA via chat, email, and telephone. The incumbent is responsible for ongoing training of new and existing Customer Service Representatives (CSRs), reviewing their completed assignments for accuracy to ensure compliance with sales and use tax laws, rules, and guidelines provided by the CDTFA, conducting call monitoring and evaluations for team members, and providing feedback. The incumbent is responsible for learning and utilizing knowledge of the Centralized Revenue Opportunity System. This position may require the incumbent to travel up to ten percent (10%) of the time, including overnight, to conduct training for the customer service representatives and remote agents. Training classes may be held at other CDTFA offices statewide.			
Candidate must be able to perform the following essential job functions with or without reasonable accommodation.			
PERCENTAGE OF TIME SPENT	DUTIES		
	<u>ESSENTIAL JOB FUNCTIONS</u>		
40%	Provides advisory services and educates taxpayers on the various programs administered by the CDTFA, including programs requiring regulatory changes; assists with the preparation of sales and use tax returns, applicable reporting forms and schedules, and CDTFA Online Services; reviews existing call center procedures to ensure compliance with disclosure requirements for release of information.		
40%	Reviews and tracks non-call work provided to CSRs, including review of closeouts, account maintenance, and other non-call work. Completes call monitoring and evaluations for team members and provides feedback. Provides guidance on the Agent Assistance line and assists CSRs with account maintenance, payments in full and/or payment plans, CDTFA Online Services, and reviewing account information to determine what action is necessary.		
15%	Provides training and instruction on the interpretation and application of the sales and use tax laws, rules, regulations, and statutes to new and current team members. Responds to taxpayer inquiries by email and chat. Reviews and routes referrals completed by CSRs to the appropriate section for further assistance.		
	<u>MARGINAL JOB FUNCTIONS</u>		
5%	Performs other job-related duties as required.		

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

- May work in a high-rise building
- Professional office setting with open floor plan

Physical Abilities:

- Ability to transport materials weighing up to thirty (30) pounds
- Ability to access and use a personal computer, office equipment, and/or telephone 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 ten percent (10%) to complete training requirements
- Overtime may be required to meet operational needs
- Late phone coverage may be required to meet 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: 05/22/2026

C&P Analyst Initials: JB