

# California Department of Tax and Fee Administration DUTY STATEMENT

☐ CURRENT  
☒ PROPOSED

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| SCHEDULE TO BE WORKED/WORKING HOURS                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | EFFECTIVE DATE                                                              |                                      |
| CIVIL SERVICE CLASSIFICATION<br><b>Tax Technician III</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | WORKING TITLE<br><b>Tax Technician</b>                                      |                                      |
| DIVISION/OFFICE/UNIT<br><b>BTFD/PCB/Compliance Branch/Collections Section</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | SPECIFIC LOCATION ASSIGNED TO                                               |                                      |
| SEERA DESIGNATION<br><b>Rank and File</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | BARGAINING UNIT<br><b>04</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | WORK WEEK GROUP<br><b>2</b>                                                 | CERTIFICATES REQUIRED<br><b>None</b> |
| FINGERPRINTS/BACKGROUND CHECK REQUIRED<br><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | BILINGUAL POSITION<br><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | SUPERVISION EXERCISED<br><b>None</b>                                        |                                      |
| INCUMBENT<br><b>Jennifer Esqueda</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | POSITION NUMBER (Agency-Unit-Class-Serial)<br><b>291 - 493 - 1975 - 045</b> |                                      |
| <p><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></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                             |                                      |
| <p>POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS</p> <p>Under the general direction of the Business Taxes Administrator (BTA) I, the Tax Technician (TT) III exercises a high level of initiative, good judgment, and independence while serving as an expert team member resource responsible for the most difficult and complex technical duties. The incumbent must obtain and utilize knowledge of the return review, account receivables, and the delinquency control process as this position is responsible for reviewing account files, correspondence, and documents; then determines the appropriate actions to be taken. The incumbent answers telephone calls and responds to correspondence regarding the various tax and fee programs, policies, and procedures. The incumbent is responsible for contacting taxpayers regarding low balance collectible liabilities and delinquent tax returns to gain compliance.</p> <p><i>The incumbent may be eligible to receive additional compensation each month for public contact through the telephone per Pay Differential 186.</i></p> <p><b>Candidate must be able to perform the following essential job functions with or without reasonable accommodation.</b></p> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                             |                                      |
| PERCENTAGE OF TIME SPENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | DUTIES                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                             |                                      |
| 60%                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | <p><b><u>ESSENTIAL JOB FUNCTIONS</u></b></p> <p>Provides customer support and assistance on the department's Customer Service Center telephone system by responding to general information calls and various program inquiries. Assists and educates taxpayers on program requirements, procedures, and operations to timely resolve compliance issues. Corresponds with and contacts other agencies and program areas within the agency. Utilizes manuals and official agency publications in responding to inquiries.</p> <p>Prepares and issues billings and adjustments as requested by compliance and audit team members, includes multiple documents which may increase or decrease liability. Clears delinquent returns by obtaining the information from the taxpayer either by phone, fax, email, or by issuing a compliance assessment. Assists with collections for balances on low dollar account receivables. Provides taxpayers and/or their authorized representatives with information on how to avoid future delinquencies.</p> |                                                                             |                                      |
| 35%                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | <p>Inspects and adjusts complex account receivable records to correct balances based upon additional information received from the taxpayer or field office. Works closely with other sections within the bureau regarding payments, time sensitive matters, and issues relating to account maintenance. Tasks include skip tracing, running property and asset searches, phone contact with the taxpayer and/or their authorized representatives, and setting up payment arrangements when a liability remains unpaid, or the taxpayer is unable to pay the liability in full. Utilizes the department's system to review account history, document communication or actions taken, conduct research, and reconstruct closed files. Prepares recommendations for write-offs.</p>                                                                                                                                                                                                                                                                |                                                                             |                                      |
| 5%                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <p><b><u>MARGINAL JOB FUNCTIONS</u></b></p> <p>Performs other job-related duties, as required.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                                             |                                      |

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| POSITION NUMBER (Agency-Unit-Class-Serial)<br><b>291 - 493 - 1975 - 045</b>                                                                                                                                                                                                       |                        | Page 2 of 2              |
| <b>WORK ENVIRONMENT OR PHYSICAL ABILITIES REQUIRED FOR THE JOB</b> <i>(if applicable):</i>                                                                                                                                                                                        |                        |                          |
| <b>Work Environment:</b> <ul style="list-style-type: none"> <li>Depending on your work location, you may be in a high-rise building.</li> </ul>                                                                                                                                   |                        |                          |
| <b>Physical Abilities:</b> <ul style="list-style-type: none"> <li>Ability to access and use a laptop, office equipment, and/or telephone system daily.</li> <li>Ability to remain in a stationary position, consistent with office work, for extended periods of time.</li> </ul> |                        |                          |
| <b>Additional Requirements/Expectations:</b> <ul style="list-style-type: none"> <li>Travel may be required up to five percent (5%) of the time.</li> </ul>                                                                                                                        |                        |                          |
| <i>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.</i>                                                                                                              |                        |                          |
| PRINT EMPLOYEE NAME<br><b>Jennifer Esqueda</b>                                                                                                                                                                                                                                    | EMPLOYEE'S SIGNATURE   | DATE                     |
| <i>I certify that the above accurately represents the duties of the position and that I have reviewed these duties with the above-named employee.</i>                                                                                                                             |                        |                          |
| PRINT SUPERVISOR NAME                                                                                                                                                                                                                                                             | SUPERVISOR'S SIGNATURE | DATE                     |
| HRB Approval Date: 08/18/26                                                                                                                                                                                                                                                       |                        | C&P Analyst Initials: AS |