

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	
DIVISION/OFFICE/UNIT Field Operations Division/CSB/Liens & Specialized Collections		SPECIFIC LOCATION ASSIGNED TO	
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>			
POSITIONS ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS Under the general direction of a Business Taxes Administrator (BTA) I, the Tax Technician (TT) III serves as an experienced resource and performs the most difficult and complex tax technician duties. This may include but is not limited to working with all levels of government agencies and internal units to support revenue collection. The incumbent initiates, responds, and resolves statewide compliance cases involving active, delinquent, closed, and revoked sales and use tax accounts , determining lien action required, initiating collection action and compliance via other governmental agencies establishing, clearing, or adjusting delinquencies of tax accounts; and refunding or making adjustments to accounts; Travel may be required up to 5% of the time for training purposes. Candidate must be able to perform the following essential job functions with or without reasonable accommodation.			
PERCENTAGE OF TIME SPENT	DUTIES		
45%	<u>ESSENTIAL JOB FUNCTIONS</u> Processes requests for escrow clearances by either obtaining evidence of payment of all taxes and fees or arranging for payment of outstanding liabilities. Creates and issues account-specific demand notices. Advises and assists escrow personnel and financial institutions of CDTFA policies and requirements prescribed by law to ensure completion of the process. Independently researches escrow clearance problems for resolution and refers cases to Business Taxes Representatives for assistance when appropriate. Enter clearance cases into CROS timely.		
30%	Reviews early lien requests made by field office and headquarters collection units. Determines status of liability to approve the request or void liens that do not meet the criteria. Determines where liens should be recorded and enters proper lien information into CROS. Reviews CROS and Documentum File to facilitate requests from the Field Offices or other headquarters collection units, where collections have been exhausted and pursuing the outstanding debt is no longer prudent. Reviews CROS notes, checks real property locator, prepares liens or renewal of liens, and checks Secretary of State corporate status for suspension before approving the account for discharge of accountability.		
10%	Contacts taxpayers about delinquent accounts and arranges for filing and payment of returns. Explains the nature of the delinquency and asks for delinquent returns to be filed. Provides taxpayers deadlines for filing returns and/or payment for the balance. Educates taxpayers about legal obligation to file and pay. Explains the consequences for non-compliance. Performs account maintenance to update addresses, ownership, and proper reporting basis. Determines if an account needs to be closed out.		
10%	Perform search in CROS to verify that the offset list information matches the CDTFA registration information. Place notes in CROS memorializing efforts to ascertain refund amount. Determine the finalized collectible balance and determine if the offset should be accepted. Notify the other agency in writing of the amount due and request the offset payment. Reconcile monthly offset reports to verify which funds were received.		
5%	<u>MARGINAL JOB FUNCTIONS</u> 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: 09/09/2026

C&P Analyst Initials: DF