

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 Tax Representative	
DIVISION/OFFICE/UNIT Field Operations Division/CSB/Bankruptcy		SPECIFIC LOCATION ASSIGNED TO Sacramento, CA	
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 None	
INCUMBENT		POSITION NUMBER (Agency-Unit-Class-Serial) 291- 472 -8690- XXX	
<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 close supervision of the Business Taxes Administrator (BTA) I, the Business Taxes Representative (BTR) performs tax compliance work which may include, reviewing compliance cases, legal documents, or preparing bankruptcy and legal claims to ensure the California Department of Tax and Fee Administration (CDTFA)'s compliance with legal requirements; providing technical advice, verbally and in writing; responding to contacts from field and tax program team members, taxpayers, and their representatives; monitoring accounts and performing actions to protect the state's interest. Travel may be required for up to 10% of the time, including overnight stays. Candidate must be able to perform the following essential job functions with or without reasonable accommodation.			
PERCENTAGE OF TIME SPENT	DUTIES		
65%	<u>ESSENTIAL JOB FUNCTIONS</u> Performs the full bankruptcy case analysis and processing for the least complex bankruptcy cases from initial case intake through final disposition. Reviews and analyzes related accounts and cases in CROS, including liabilities, audits, delinquencies, successor liability indicators, warrant fees, liquor license holds, liens, and other compliance factors. Prepares and files the least complex and lower dollar bankruptcy claims, including electronic filings, in accordance with applicable bankruptcy case types and CDTFA requirements. Files claims on the government filing website after approval from the lead. Monitors all filings, notices, deadlines, and trustee communications; evaluates legal notices and determines appropriate actions; with the guidance from their lead, prepares memoranda, case documentation, bankruptcy reports, and liability calculations to support accurate claim preparation and case resolution. Coordinates with the lead or the Business Taxes Compliance Specialist (BTCS) as needed for review and approval of claim filings. Performs post-bankruptcy analysis to determine required adjustments and recommends appropriate discharge of liabilities consistent with bankruptcy law.		
20%	Responds to telephone calls, written inquiries, and other communications from taxpayers, attorneys, trustees, and personnel throughout the department. Provides basic tax service and case information, answers questions, and explains requirements and next steps in a clear and professional manner. Guides individuals to appropriate resources, policies, or team members as needed. Documents communications and updates account information to ensure accurate case records and consistent support for ongoing bankruptcy and legal collection matters. Supports coordination between field offices and Headquarters units by supplying technical information and guidance relevant to bankruptcy or legal collection matters.		

10%

Initiates and resolves compliance and collection actions, reviewing and releasing liens, evaluating liquor license holds or releases, reviewing secondary and dual liability matters, and assessing proper payment applications and adjustments. Prepares statements, demand notices, and recommendations for Discharge from Accountability through the State Controller's Office.

MARGINAL JOB FUNCTIONS

5%

Performs other job-related duties to cover the workload. This includes assisting with special projects, supporting training activities, and completing miscellaneous assignments that arise to meet operational needs.

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: 03/04/2026

C&P Analyst Initials: DF