California Department of Tax and Fee Administration

DUTY STATEMENT

☐ CURRENT
☐ PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION		WORKING TITLE	
Tax Technician III		**Tax Technician III**	
DIVISION/OFFICE/UNIT		SPECIFIC LOCATION ASSIGNED TO	
FMD/FOB/Local Revenue Branch		**Sacramento, CA – Headquarters Office**	
SEERA DESIGNATION	BARGAINING UNIT	WORK WEEK GROUP	CERTIFICATES REQUIRED
Rank and File	**04**	**2**	**None**
FINGERPRINTS/BACKGROUND CHECK REQUIRED	BILINGUAL POSITION	SUPERVISION EXERCISED	
☒ Yes ☐ No	☐ Yes ☒ No	**None**	
INCUMBENT		POSITION NUMBER *(Agency-Unit-Class-Serial)*	
		291 - 486 - 1975 -	

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.

POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS

Under the general direction of the Supervising Tax Auditor (STA) I, the Tax Technician (TT) III in the Local Revenue Branch (LRB) is responsible for reviewing and responding to the California Department of Tax and Fee Administration (CDTFA)-755 document requests received from consultants, cities, counties, and transit districts. In addition, the TT III reviews the more complex TAC (Tax Area Code) petitions and less complex local/district tax petition/redistribution assignments (CDTFA-549 and CDTFA-75) and creates system cases. The TT III demonstrates a high degree of independence, initiative and judgment and serves as an expert staff resource on return processing. The TT III applies knowledge of complex data processing programs relating to the allocation and funding of state, local, transit district and in-lieu taxes, and applies detailed knowledge of Business Taxes Laws, Rules and Regulations related to the administration of Local & Transactions Sales and Use Taxes and Petitions for Redistribution.

Candidate must be able to perform the following essential job functions with or without reasonable accommodation.

PERCENTAGE OF TIME SPENT	DUTIES
	ESSENTIAL JOB FUNCTIONS
50%	Maintains a list of all incoming CDTFA-549 (Petition), creates spreadsheets for tracking, and creates a Centralized Revenue Opportunity System (CROS) case. Reviews the CDTFA-549 for accuracy and completeness; if incomplete, return for correction. Review e-file and taxpayer records for information requested and prepare copies. Creates system cases. Prepares information requested and provides to consultant and/or city. Reviews Tax Area Code and simple local and district tax redistribution inquiries and CDTFA-75's.
25%	Evaluates and takes necessary action either by contacting taxpayer by phone or mail to resolve the less complex assignments questioning local and district tax (CDTFA-549 - Petition for Redistribution, CDTFA-75-Local/District Tax Discrepancy form, assignments, including billings) with tax amounts less than $5,000 as reported by taxpayer or based on questionable items found and assigned by audit staff. Understands and interprets information from taxpayers, team members, and district staff to apply knowledge and make online corrections and fund transfers, when necessary. When applicable, contacts taxpayer regarding missing schedules (local/district tax amounts less than $5,000), computation errors or questionable items on returns. Draft Decision Letters in response to Petitions. Evaluates the taxpayer's file and system data information to determine if any action is required. When applicable, contacts taxpayers regarding missing schedules or questionable items. Makes any necessary adjustments to ensure proper funding. Responds to document requests for copies of taxpayer specific returns and/or schedules. Contacts taxpayer to request and process returns/schedules as necessary. As a result of correspondence from field and Headquarters staff, investigates and makes any necessary corrections regarding questionable return data.
20%	Reviews for content and post decision letters issued by auditors to the secure portal and notifies jurisdictions/others when posted. Assists consultants and cities with on-site record reviews as necessary.

5%	**MARGINAL JOB FUNCTIONS** Performs other job-related duties as required.

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

Work Environment:

- Performs other job-related duties as required.

Physical Abilities:

- Ability to remain in a stationary position, consistent with office work, for extended periods of time.

Additional Requirements/Expectations:

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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: 6/29/2026	**C&P Analyst Initials: AC**