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 **PPDD/HOB/Return Analysis Section**		SPECIFIC LOCATION ASSIGNED TO **MLSOC - 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 - 481 - 8690 - xxx**	

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 close supervision of a Business Taxes Administrator I, the Business Taxes Representative will learn and perform all aspects of compliance. The Business Taxes Representative conducts reviews and research necessary to resolve issues on tax returns, schedules, and reports; interprets and applies tax law, regulations, and annotations to ensure taxpayer compliance; reviews tax returns, schedules, reports, and taxpayer correspondence; communicates with taxpayers; performs return, schedule, and report maintenance duties; processes relief from penalty cases and provides training and assistance to team members; provides assistance with tax laws, regulations, annotations, and provisions related to the programs administered by the division. The actions taken are to be performed in accordance with current tax laws, regulations, policies and procedures. Work assignments must be processed in a timely manner and the appropriate detailed comments entered on accounts. The incumbent performs duties pertaining to special assignments, and other duties as required.

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

PERCENTAGE OF TIME SPENT	DUTIES
45%	**ESSENTIAL JOB FUNCTIONS** Return Processing/Return Analysis/Consumer Use Tax Functions • Analyzes tax returns, schedules, and reports to determine acceptability of deductions, correct tax reporting/allocation, and proper tax computation. Interprets and applies tax laws, regulations, and annotations to ensure taxpayer's compliance, and address taxpayer inquiries. • Resolves identified questionable return, schedule, and report problems through telephone contact, standard or custom written correspondence (including replies and follow-ups to initial correspondence), and issues determinations (billings). • Performs return, schedule, report, and payment maintenance/adjustments in the system to establish and adjust tax, interest, and/or penalty and resolve unapplied payment issues. • Professionally communicates with taxpayers and field office team members over the telephone/video conferencing to resolve return, schedule, and report reporting issues, assists with return and report preparation, and addresses questions relating to the billing, adjusting, analysis, and delinquency maintenance workload of the unit. Processes and resolves assigned refund, or requests for relief cases in a timely manner. • Reviews taxpayer's correspondence and takes appropriate action. Determines the appropriate action to take when there is no evidence of a response from a taxpayer to a letter inquiry within a specified time period. • Provides advisory services to internal and external customers via telephone, email, letter, or in person.

	AND <u>Additional Consumer Use Tax Functions when applicable:</u> • Assigns the account to another team member or unit for further investigation, as appropriate. Reviews registration information from outside sources for vehicles, vessels, or aircraft to determine true ownership. • Makes registration corrections to reflect true ownership. • Establishes estimated values of vehicles, vessels, or aircraft using various valuation tools available. • Reviews exemptions claimed and if additional information is required, initiates contact with the internal or external customer via telephone, email, by letter, or in person to determine the appropriate course of action. • Updates and enters clear and detailed comments on accounts. • Utilizing the applicable tax laws and regulations, analyzes and reviews cases to determine if tax is due based on leads generated from third party data and other miscellaneous sources and initiates billings as appropriate. • Reviews and makes recommendations on Tax Clearances.

30%	<u>Return Analysis and Return Processing Functions</u>
	
	• Resolves unapplied credits and return suspense items.
	• Processes maintenance requests from team members to adjust/review penalties and balances on accounts.
	
	OR
	
	<u>Return Analysis Electronic Fund Transfer Functions</u>
	
	• Answers telephone and written inquiries regarding electronic fund transfer payment processing and related issues including but not limited to:
	  ○ Electronic fund transfer reporting methods.
	  ○ Transmitting, cancelling, and inquiring about electronic fund transfer payments.
	  ○ Due dates and settlement dates.
	  ○ Authorization of taxpayers to make Fedwire payments to receive timely settlement dates.
	  ○ Request for relief options, and all other aspects relating to the electronic fund transfer process.
	
	• Prepares standard and custom written correspondence to address Automated Clearing House payment format errors.
	• Applies electronic fund transfer and credit card payments.
	• Provides analytical assistance to team members performing electronic fund transfer payment maintenance activities.
	• Resolves suspended payments.
	
	OR
	
	<u>Consumer Use Tax Functions</u>
	
	• Creates cases from leads generated from various sources and department reported leads to determine applicable tax, exemptions, substantiation, and accurate assessment of tax.
	• Reviews and handles responses to non-final billings.
	• Recommends cancellations, adjustments, and refunds to a liability.
	• Processes and resolves assigned petitions for redeterminations.

20%	Return Processing/Return Analysis/Consumer Use Tax Functions • Educates taxpayers and the general public on the provisions of the tax programs administered including providing advisory services verbally and in writing in response to taxpayer inquiries. This may include accepting calls on the Customer Service Center or EFT Help Line telephone systems. • Assists taxpayers and their representatives with the preparation of tax returns, schedules, reports, and making payments. • Provides technical and analytical assistance to section team members performing duties at lower classifications such as billing/adjusting and return processing activities.
5%	**MARGINAL JOB FUNCTIONS** • Trains other team members as needed. • Performs duties related to special assignments. • Attends appeal conferences as needed on determinations issued. • Performs system testing. • Attends training and meetings, as required. • Performs other job-related duties as required.

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

Work Environment:

- Depending on your work location, you may be working in a high-rise building.

Physical Abilities:

- Ability to access and use a laptop, office equipment, and/or telephone system daily.
- Ability to remain in a stationary position, consistent with office work, for extended periods of time.
- Ability to transport materials up to ten (10) pounds, with or without reasonable accommodation.

Additional Requirements/Expectations:

- Travel may be required up to ten percent (10%) of the time.

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: 09/24/26	**C&P Analyst Initials: ANS**