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 II		**Tax Technician II**	
DIVISION/OFFICE/UNIT		SPECIFIC LOCATION ASSIGNED TO	
Office of the Director/ Taxpayers' Rights Advocate Office		**Sacramento 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)*	
		291-309-1974-001	

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 general supervision of the Business Taxes Administrator II, Taxpayers' Rights Advocates (TRA) Office, the Tax Technician (TT) II performs a full range of more complex technical duties. The incumbent will exercise a high degree of judgment and perform a wide variety of routine advisory services to taxpayers and other governmental agencies by phone or in writing and is responsible for performing a variety of technical functions for the TRA Office. The TT II may be the taxpayers' first point of contact with the TRA Office and must exercise tact, empathy, and good judgment. The TT II is responsible for working on technical assignments or assisting team members in communicating with taxpayers. On a routine basis, the TT II will assist team members with research on taxpayer account history and will perform other related duties as necessary.

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

PERCENTAGE OF TIME SPENT	DUTIES
	ESSENTIAL JOB FUNCTIONS
55%	Assist taxpayers and TRA Office team members on routine taxpayer contacts. On a regular basis, the TT II will work taxpayer accounts by discussing the problem with the taxpayer, establishing a taxpayer profile in the TRA database, reviewing the case in CROS, independently contacting and coordinating all necessary division(s) or section(s) for appropriate information, and resolving more complex taxpayers' issues using judgment and initiative.
30%	Conduct preliminary information gathering from taxpayer accounts and entering items into the database to ensure complaint issues are thoroughly documented.
10%	Conduct general record keeping, process incoming/outgoing mail and email, update CROS, and maintain taxpayer files per TRA Office guidelines. Maintain and monitor the Clearance Log.
	MARGINAL JOB FUNCTIONS
5%	Provide guidance/assistance to other members of the Division administrative support staff as needed. Performs other job-related duties as needed.

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

Work Environment:

- May work in a high-rise building.

Physical Abilities:

- Ability to access and use a personal computer, office equipment, and/or telephone daily
- 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: 10/27/2026	**C&P Analyst Initials: AB**

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 I		**Tax Technician I**	
DIVISION/OFFICE/UNIT		SPECIFIC LOCATION ASSIGNED TO	
Office of the Director/ Taxpayers' Rights Advocate Office		**Sacramento 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)*	
		291-309-1973-001	

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 close supervision of the Business Taxes Administrator II, Taxpayers' Rights Advocates (TRA) Office, the Tax Technician (TT) I learns and performs common office duties. The incumbent provides a wide variety of routine advisory services to taxpayers and other governmental agencies by phone or email and will learn and perform a variety of technical functions for the TRA Office. The TT I may be the taxpayers' first point of contact with the TRA Office and must exercise tact, empathy, and good judgment. The TT I is responsible for working on technical assignments or assisting team members in communicating with taxpayers. On a routine basis, the TT I will assist team members with research on taxpayer account history and will perform other related duties as necessary.

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

PERCENTAGE OF TIME SPENT	DUTIES
	ESSENTIAL JOB FUNCTIONS
65%	Assist taxpayers and TRA Office team members on routine and less complex taxpayer contacts. On a regular basis, the TT I will work taxpayer accounts by discussing the problem with the taxpayer, establishing a taxpayer profile in the TRA database, reviewing the case in the Centralized Revenue Opportunity System (CROS), gathering basic information from the appropriate division(s) or section(s), and resolving straightforward taxpayer issues.
20%	Conduct preliminary information gathering from taxpayer accounts and entering items into the database to ensure complaint issues are thoroughly documented.
10%	Conduct general record keeping, process incoming/outgoing mail and email, update CROS, and maintain taxpayer files per TRA Office guidelines. Maintain and monitor the Clearance Log.
	MARGINAL JOB FUNCTIONS
5%	Performs other job-related duties as needed.

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

Work Environment:

- May work in a high-rise building.

Physical Abilities:

- Ability to access and use a personal computer, office equipment, and/or telephone daily
- Ability to remain in a stationary position, consistent with office work, for extended periods of time

Additional Requirements/Expectations:

-

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: 10/27/2026	**C&P Analyst Initials: AB**