California Department of Tax and Fee Administration

DUTY STATEMENT

☒ CURRENT
☐ PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION		WORKING TITLE	
Business Taxes Specialist II		**Business Taxes Specialist II**	
DIVISION/OFFICE/UNIT		SPECIFIC LOCATION ASSIGNED TO	
PPDD/TPB/Special Tax and Fee Policy Section			
SEERA DESIGNATION	BARGAINING UNIT	WORK WEEK GROUP	CERTIFICATES REQUIRED
Rank and File		**2**	**None**
FINGERPRINTS/BACKGROUND CHECK REQUIRED	BILINGUAL POSITION	SUPERVISION EXERCISED	
☒ Yes ☐ No	☐ Yes ☒ No	**Acts as a Lead**	
INCUMBENT		POSITION NUMBER *(Agency-Unit-Class-Serial)*	
		291-498-4379-	

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 supervision of the Business Taxes Administrator II, the Business Taxes Specialist II, serves as a lead on and coordinates multifaceted tax and fee program projects. The incumbent develops tax and fee policies and procedures with other units within the California Department of Tax and Fee Administration (CDTFA), other state government departments, and the federal government. The incumbent handles complex special projects; prepares written correspondence on the application of tax and fee laws with taxpayers; and participates in interactions with management, team members, accountants, tax managers, directors, accounting firms, and attorneys. The incumbent must obtain and utilize a complete knowledge of all aspects of STFPS, Tax Policy Bureau (TPB), and the Processing, Policy and Data Division (PPDD) functions, software, and revenue system utilized by the CDTFA, including the appeals process, audit process, compliance process, collection functions, as well as procedures and protocols of the various program areas. In addition, the incumbent will need to become familiar with the regulatory, legislative, and budget processes administered by the CDTFA.

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

PERCENTAGE OF TIME SPENT	DUTIES
	ESSENTIAL JOB FUNCTIONS
20%	Independently reviews and/or develops departmental policies and procedures for tax and fee programs. Prepares reports related to the tax and fee audit and compliance functions as well as technical tax and policy-related administrative matters. Drafts responses to requests from taxpayers, departmental management, the legislature, or other stakeholders. Drafts and reviews correspondence received by or to be sent by the Chief of the TPB and/or the Section Administrator.
20%	Acts as a lead person on TPB projects and functions with other intra- and inter-department groups. Implements, manages, and coordinates special projects as requested by the management of the STFPS. Acts as a team lead on various projects, both in and outside the CDTFA.
20%	Drafts, reviews, and coordinates tax and fee legislative proposals. Acts as lead on costings for new tax and fee programs under consideration. Acts as a lead on the development of Budget Change Proposals, Feasibility Study Reports, rules and regulations, training programs, audit and compliance policies and procedure manuals, Operations Memorandums, and other policy documents for tax and fee programs. Reviews and analyzes legislation affecting the tax and fee programs and coordinates implementation with other program areas, taxpayers, and stakeholders.
20%	Researches, investigates, and resolves complex audit, compliance, and/or operational issues, often of a highly technical, sensitive, and confidential nature for tax and fee programs. Prepares reports on the findings, makes recommendations for action, and drafts necessary correspondence or procedures as appropriate. Prepares written responses to taxpayers, their representatives, or other interested parties' requests regarding the application of taxes, fees, and surcharges to specific situations, and team members' use of policies or procedures as they relate to the tax and fee programs. Provides advisory services to taxpayers on a nationwide basis.

15%	Develops management reports that include analysis and recommendations to support effective monitoring of the department's activities and operational efficiencies, and to assist in identifying and implementing more efficient methods for administering tax and fee programs. Performs other duties of a highly technical, time-critical, and/or politically sensitive nature. Prepares and presents information on tax and fee programs to the public, peers, and/or management.
	MARGINAL JOB FUNCTIONS
5%	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.

Additional Requirements/Expectations:

- Travel may be required up to five percent (5%) 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: 6/16/2026	**C&P Analyst Initials: ANS**