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 Compliance Specialist		**Tax Compliance Specialist**	
DIVISION/OFFICE/UNIT		SPECIFIC LOCATION ASSIGNED TO	
PPDD/HOB/Return Analysis Section			
SEERA DESIGNATION	BARGAINING UNIT	WORK WEEK GROUP	CERTIFICATES REQUIRED
Rank and File	**01**	**02**	**None**
FINGERPRINTS/BACKGROUND CHECK REQUIRED	BILINGUAL POSITION	SUPERVISION EXERCISED	
☒ Yes ☐ No	☐ Yes ☒ No	**May act as lead**	
INCUMBENT		POSITION NUMBER *(Agency-Unit-Class-Serial)*	
		291-481-8694- 029	

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 a Business Taxes Administrator I, the Business Taxes Compliance Specialist (Specialist) performs the most complex compliance functions. The Specialist acts as the technical and operational expert for a team performing the day-to-day duties associated with the billing, analysis, delinquency maintenance and return processing activities of the Return Analysis Section (RAS). The Specialist is assigned the more complex/sensitive cases handled by the RAS. In a lead capacity, the incumbent effectively and efficiently works with team members in the billing, analysis, delinquency maintenance and return processing activities of the RAS. The Specialist performs special assignments and other job-related duties as required.

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

PERCENTAGE OF TIME SPENT	DUTIES
40%	**ESSENTIAL JOB FUNCTIONS** Support Analysis Activities: Analysis of Questionable Returns and Taxpayer Correspondence. • Reviews and approves the work of lower-level team members performing analysis activities. • Interprets various tax laws and regulations relating to analysis activities. • Provides technical, procedural, and analytical assistance relating to analysis activities. • Prepares/assists with standard and custom-written taxpayer and other correspondences relating to analysis activities. • Reviews, recommends, and/or approves action on relief of penalty/interest cases. • Performs quality assurance reviews of work performed by lower-level team members. **AND**
30%	Support Billing/Adjustment/Delinquency Maintenance/Return Processing Activities: Billing and Adjusting of Accounts Receivable; Delinquency Maintenance; and Return Processing. • Reviews and approves the work of lower-level team members performing billing/adjusting, delinquency maintenance, and return processing activities. • Provides technical, procedural, and analytical assistance to team members performing billing/adjusting, delinquency maintenance, and return processing activities. • Prepares/assists with standard written taxpayer and other correspondence relating to the billing/adjusting, delinquency maintenance, and return processing activities. **OR** Return Analysis Electronic Fund Transfer Functions, Including Support Billing/Adjustment/Delinquency Maintenance/Return Processing Activities: Billing and Adjusting of Accounts Receivable; Delinquency Maintenance; and Return Processing.

- Provides training and analytical assistance to team members performing electronic fund transfer payment maintenance, including payment traces for Automated Clearing House (ACH) debit/credit and credit card payments
- Works with internal and external customers to process ACH debit/credit electronic fund transfer payment reversals and credit card chargeback/reversal requests.
- Reviews and approves the work of lower-level team members processing Request for Interest Adjustment on Electronic Payments- One Day late.
- Reviews and approves the work of lower-level team members performing billing/adjusting, delinquency maintenance, and return processing activities.
- Provides technical, procedural, and analytical assistance to team members performing billing/adjusting, delinquency maintenance, and return processing activities.
- Prepares/assists with standard written taxpayer and other correspondence relating to the billing/adjusting, delinquency maintenance, and return processing activities.

15% Complex/Sensitive Case and Special Assignment Activities:

- Utilizes resources provided by the Department, the Specialist researches complex tax programs' legal questions.
- Prepares memorandums legal opinions relating to taxability and other issues relating to the desk audit and analysis activities.
- Prepares sensitive taxpayer and other correspondence relating to billing, analysis, delinquency maintenance, and return processing activities for the signature of supervisors, management, executive group, or other government officials.
- Performs the most difficult account reconstruction/reconciliation assignments utilizing the system of record for research purposes, taxpayer file information, and other available information.
- Performs special assignments, including but not limited to forms/manual updates, clearances, and legislative change analysis.

10% Training/Assisting Activities:

- Instructs/assists other team members on policy and procedures relating to the billing, adjusting, and analysis activities.
- Provides training on standard and custom written taxpayer correspondence to team members.
- Provides training on operational areas in the system of record and other related Department systems for team members.
- Explains technical/procedural information relating to the billing, adjusting, and analysis activities to team members, supervisors, and management.

MARGINAL JOB FUNCTIONS

5% As assigned, acts in the absence of the Team Supervisor/ Other Team Specialist, and performs other duties as required:

- Handles administrative duties related to items such as attendance and lead team activities, as assigned.
- Tests systems and 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: 07/09/26	**C&P Analyst Initials: AS**