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 - Escrow**	
DIVISION/OFFICE/UNIT		SPECIFIC LOCATION ASSIGNED TO	
Field Operations Division/		**Santa Ana , CA**	
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)*	
		291-553-1975- 006	

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 Business Taxes Administrator (BTA) I, the Tax Technician (TT) III serves as an experienced resource and performs the full range of escrow duties. The incumbent is responsible for ensuring the field office escrow accounts and clearances are handled in a timely manner. This includes, but is not limited to, processing escrow clearance requests, evaluating available data, obtaining additional data, advising taxpayers and other professionals, and preparing demands, withholds, and/or releases. In some cases, workload may be based on job assignment or other duties. Travel may be required up to 5% of the time for training purposes.

This position is designated to receive additional compensation each month per Pay Differential 186, which will require the team members to perform taxpayer counter services at least 50 percent (50%) of the time. This includes assisting taxpayers with registration, escrow services, cashier services, account maintenance, and filing returns over the phone, online, or in person, and assisting taxpayers on calls received through the Customer Service Center/800 Number, Collection Split Line.

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

PERCENTAGE OF TIME SPENT	DUTIES
	ESSENTIAL JOB FUNCTIONS
45%	Processes requests for escrow clearances by obtaining required documentation verifying that all taxes have been paid and ensuring compliance with California Department of Tax and Fee Administration (CDTFA) requirements as prescribed by law. Educates buyers and sellers of businesses, their representatives, and escrow agents on the requirements to obtain escrow releases. Informs the taxpayer and escrow holder of any deficiencies that must be resolved before clearance can be issued. Uses available resources, including appropriate Centralized Revenue Opportunity System (CROS) screens, to evaluate account information to independently make sound decisions about the issuance of a certificate of clearance. Accurately determines the closeout date, outstanding delinquencies and receivables, pending audits, liquor license issues, and the amount and status of the sale of fixtures and equipment. Updates account information during the regular course of processing accounts with escrow cases.
35%	Prepares accurate demands, withholds and releases, and provides recommendations to management. Enters the required data in CROS, including comments concerning the sale of the business, the fair market value of the fixtures and equipment sold, and the taxes paid. Researches policies, procedures, and the law to determine if the sale of fixtures and equipment is taxable and computes the reportable amount. Questions and resolves issues with insufficient quoted values on fixtures and equipment. Handles liquor license transfers. Determines if a possible successorship exists. Refers accounts to the Audit Section for audit recommendations and tracks responses. Uses and maintains rigorous internal controls, electronic or manual, to track pending escrows to ensure statutory deadlines are met.
15%	As the program expert for escrows in the field office, trains staff on the process. May also process cash security releases and serves as a substitute for the lead Tax Technician III.

15%	**MARGINAL JOB FUNCTIONS** Acts as a remote agent, assisting taxpayers with questions and online services through our toll-free remote telephone lines. Reads all operational memos, law changes, and attends training classes to remain current on laws, regulations, policies, and procedures. Performs other job-related duties to cover the workload.

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

Work Environment:

- May work in a high-rise building
- Standard office environment
- Parking varies by location

Physical Abilities:

- Remain in a stationary position for extended periods of time to meet operational needs and critical deadlines.
- Use a computer/laptop, office equipment, and telephone daily.
- Ability to transfer and transport materials, supplies, and equipment weighing up to thirty (30) pounds with or without reasonable accommodation.

Additional Requirements/Expectations:

- Travel may be required to meet training requirements, which may include overnight.
- Must be flexible and willing to adjust to changing work schedules, if required, for operational needs.

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: 02/23/2026	**C&P Analyst Initials: GG**