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 - Collector**	
DIVISION/OFFICE/UNIT		SPECIFIC LOCATION ASSIGNED TO	
Field Operations Division/ Santa Ana / 553		**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- 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 general direction of the Business Taxes Administrator (BTA) I, the Tax Technician (TT) III Collector serves as an experienced resource and performs the most difficult and complex tax technician duties. This may include, but is not limited to, assisting taxpayers to ensure compliance with tax laws and performing a variety of collection functions. The incumbent initiates, responds to, and resolves statewide compliance cases involving active, delinquent, closed, and revoked sales and use tax accounts or leads. 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
40%	Contacts taxpayers about delinquent accounts and arranges for filing and payment returns. Explains the nature of the delinquency and asks for delinquent returns to be filed. Provides taxpayers with deadlines for filing returns and/or payment for the remaining balance. Educates taxpayers about the legal obligation to file and pay. Explains the consequences for non-compliance. Reinstates selected revoked accounts. May review accounts for adequate security and complete any appropriate miscellaneous account changes. Recognizes and takes appropriate action on ownership changes. Performs account maintenance to update addresses, ownership, and proper reporting basis. Determines if an account needs to be closed out. Prepares write-offs for selected uncollectible accounts meeting specific dollar thresholds. Reviews Centralized Revenue Opportunity System (CROS) and other sources to perform skip tracing to locate missing taxpayers and their assets. Recommends issuance of levies, earnings withholding orders, warrants for collection, successor billings, and estimated return assessments to clear delinquencies. Gathers and reviews taxpayer financial documents and arranges installment payment plans. Reviews collection cases with the BTA I after a designated period if collection efforts are unsuccessful or technical assistance is needed. Documents all activities in CROS as directed by the Field Operations Division (FOD).
35%	Responds to inquiries regarding delinquency notices, Notices of Proposed Liabilities, Notices of Determination, and other correspondence. Analyzes accounts and resolves taxpayer inquiries, including ownership changes and close-outs. Provides assistance to taxpayers regarding the filing and payment of their tax returns. Assists the taxpayer with matters involving collection actions, including levies. Assists taxpayers with submitting payment plans and relief requests. Reviews cases with BTA I to ensure actions taken are appropriate. Documents all activities in CROS as directed by FOD.

20%	Reviews and prepares documentation in support of claims of exemption and adjustment. Requests additional documents from taxpayers when further information is required. Answers tax law inquiries and refers taxpayers to applicable publications and industry guides as needed. Reads all operational memos, law changes, and attends classes to remain current on laws, regulations, policies, and procedures.
	MARGINAL JOB FUNCTIONS
5%	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 *(checked 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: 02/23/26	**C&P Analyst Initials: JF**