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 Representative		**Tax Representative**	
DIVISION/OFFICE/UNIT		SPECIFIC LOCATION ASSIGNED TO	
BTFD/PCB/Compliance Branch/Collections Section			
SEERA DESIGNATION	BARGAINING UNIT	WORK WEEK GROUP	CERTIFICATES REQUIRED
Rank and File	**01**	**2**	**None**
FINGERPRINTS/BACKGROUND CHECK REQUIRED	BILINGUAL POSITION	SUPERVISION EXERCISED	
☒ Yes ☐ No	☐ Yes ☒ No	**None**	
INCUMBENT		POSITION NUMBER *(Agency-Unit-Class-Serial)*	
		291-493-8690-	

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 I, the Business Taxes Representative will provide assistance to taxpayers to ensure compliance with tax laws, collect delinquent taxes, and perform a variety of compliance and collection functions. The incumbent will be responsible for learning all phases of tax compliance, licensing, laws, rules, and regulations administration, and utilizing their knowledge when performing the duties of the compliance and collection work.

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

PERCENTAGE OF TIME SPENT	DUTIES
	ESSENTIAL JOB FUNCTIONS
60%	Reviews taxpayers account history to determine appropriate action to be taken for purposes of resolving discrepancies on returns, delinquencies, collections, and revocations. Performs skip tracing activities to locate assets or taxpayers. Initiates contact by phone or written correspondence to collect delinquent returns, taxes, and fees. Sets up payment arrangements, takes summary collection action to collect delinquent liabilities or make requests for detailed information and documentation from taxpayers. Sets follow up dates and follows through to completion. Verifies the amount of taxes and fees due by reviewing returns for completeness and accuracy. Bills, cancels, or adjusts amounts due. Investigates and resolves unidentified or unapplied payments. Initiates requests for discharge from accountability when appropriate and documents all actions taken.
30%	Provides advisory services verbally and in writing in response to inquiries regarding the various tax and fee programs administered by the department. Assists and educates taxpayers to resolve registration, compliance, and tax collection issues timely. Provides assistance to team members on issues pertaining to registration, returns, and collections that require additional research.
	MARGINAL JOB FUNCTIONS
5%	Prepares correspondence for management or department team members in response to inquiries received from various sources outside and inside the department. Uses computer software to compile, compute, and organized data for use and reports.
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 remain in a stationary position, consistent with office work, for extended periods of time.
- Ability to access and use a laptop, office equipment, and/or telephone system daily.

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: 11/5/2026	**C&P Analyst Initials: JVR**