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 I		**Tax Technician I**	
DIVISION/OFFICE/UNIT		SPECIFIC LOCATION ASSIGNED TO	
Field Operations Division/ Oakland - Compliance		Oakland **, 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 - 033 - 1973 - 752	

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 close supervision of the Business Taxes Administrator (BTA) I, the Tax Technician (TT) I performs the less complex technical duties and support functions for the unit. This may include, but is not limited to, applying laws, rules and policies relating to the California Department of Tax & Fee Administration's (CDTFA) programs, issuing permits, performing account maintenance, initiating contact with taxpayers about delinquencies, accessing taxpayer information, processing incoming and outgoing mail, which may include payments, and sensitive or confidential mail and/or material. 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 member to perform taxpayer counter services at least 50 percent (50%) of the time. This includes assisting taxpayers with registration, 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%	May be required to assist potential permit holders with permit issuance and provide them with an understanding of their responsibilities. Provides tax law information and routine advisory services to taxpayers and their representatives. Acts as receptionist for the unit. Answers and transfers incoming calls to the appropriate team member. Assists taxpayers in completing basic Sales and Use tax returns. Assists taxpayers in filing for relief of penalty, declarations of timely mailing, or requests for extensions. Handles all incoming and outgoing mail and leads received from various sources to determine next steps. Handles registration assignments through the department's database: Centralized Revenue Opportunity System (CROS). In field offices, handles Vehicle/Vessel Use Tax Clearance requests, assists taxpayers with preparation, reviews supporting documentation, determines approval or denial, prepares and completes CDTFA-106, and obtains approval and preparation of CDTFA-111 Vehicle/Vessel Use Tax Clearance Certificate.
35%	Contacts taxpayers about delinquent accounts that are low-dollar, part-time, or temporary. Explains the nature of the delinquency and asks for delinquent returns to be filed. Provides taxpayers with deadlines for filing a return and/or payment of the balance. Educates the taxpayer about the legal obligation to file and pay. Explains the consequences of non-compliance. Reviews CROS and other sources to perform skip tracing to locate missing taxpayers. Documents activities in CROS. Recommends referral to a collector when an estimated return is needed to clear the delinquency or when collection action is needed to clear the account balance.

20%	Updates addresses, processes name changes, and processes account closures using appropriate follow-ups. Processes requests for account changes that are generated within the office. Tracks, works on, and follows up on returned mail by contacting the taxpayer, looking up forwarding addresses, and performing basic skip tracing to locate new addresses. Acts as a Remote Agent providing tax law information and routine advisory services to taxpayers and their representatives, performing basic registration updates, and assisting with filing basic sales and use tax returns and other online services. Processes security deposit release requests.
	MARGINAL JOB FUNCTIONS
5%	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: 1/22/2026	**C&P Analyst Initials: TP**