California Department of Tax and Fee Administration

DUTY STATEMENT

☐ CURRENT
☐ PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION **Business Taxes Specialist III**		WORKING TITLE **Technical Advisor**	
DIVISION/OFFICE/UNIT **Processing, Policy & Data Division/Technology & Data Analysis Bureau**		SPECIFIC LOCATION ASSIGNED TO **Sacramento HQ**	
SEERA DESIGNATION **Rank & File**	BARGAINING UNIT **01**	WORK WEEK GROUP **E**	CERTIFICATES REQUIRED **None**
FINGERPRINTS/BACKGROUND CHECK REQUIRED ☒ Yes ☐ No	BILINGUAL POSITION ☐ Yes ☒ No	SUPERVISION EXERCISED **May act as a lead**	
INCUMBENT		POSITION NUMBER *(Agency-Unit-Class-Serial)* **291-351-4378-**	

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 Chief of the Technology and Data Analysis Bureau (TDAB), the Business Taxes Specialist (BTS) III acts as a high-level technical resource on matters concerning tax policy issues including the analysis of legislation and corresponding revenue estimates, compiling and distributing data for internal and external customers, and the development of policies and procedures for handling unprecedented tax issues. The Technical Advisor assists and advises the Chief in the development and implementation of strategies for effective and efficient administration of the tax and fee programs and coordinates complex or unprecedented tax and fee projects and activities. The BTS III also coordinates assignment and project planning and tracking on behalf of the Chief, serving as a liaison when needed. This position supports the Chief in evaluating strategic and operational planning to ensure compliance with the Department's mission, goals, strategies, and objectives. The incumbent independently performs duties of the highest technical nature under minimal supervision.

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%	Serves as the highest-level technical specialist and advisor to the TDAB Chief. Develops program plans, practices, and policies; provides consultations and presentations to executives, program, and legal management on the most complex audit and compliance program policies and procedures. Makes recommendations to the Chief and executive management on program policies, procedures, and practices. Prepares or coordinates the preparation of reports on a variety of technical, fiscal, or executive management requested subjects. Independently prepares responses and reviews all TDAB responses related to budgetary hearings, legislature, and other control agencies' inquiries.
30%	Serves as a liaison for the Chief with internal and external divisions, departments or agencies, executive management, and the public. Acts for the Chief, as directed, and represents him/her in meetings, hearings, and conferences. Reviews materials on behalf of the Chief.
15%	Reviews completed assignments submitted by reporting bureaus, makes recommendations, and coordinates tracking and follow-up of assignments on behalf of the Chief to ensure timely completion.
10%	Conducts independent, in-depth research on technical tax applications; consults with legal counsel to resolve complex and unique legal issues; prepares recommendations of proposed action to the Chief.
	MARGINAL JOB FUNCTIONS
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 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, which may include overnight.

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: 11/16/2026	**C&P Analyst Initials: JVR**