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 Compliance Specialist		**Tax Compliance Specialist**	
DIVISION/OFFICE/UNIT		SPECIFIC LOCATION ASSIGNED TO	
BTFD/PCB/RRPB/Return Processing Section		**Sacramento, CA - Headquarters**	
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	**May act as lead**	
INCUMBENT		POSITION NUMBER *(Agency-Unit-Class-Serial)*	
		291 - 517 - 8694 - 019	

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 supervision of the Business Taxes Administrator (BTA) I, the Business Taxes Compliance Specialist (BTCS) independently performs the more complex activities including the review and approval of assignments, working the more difficult cases, and being a technical resource for team members. Additional duties include special projects that impact the department, division, or branch. Develops policies or procedures related to compliance or administrative issues and trains other team members in various areas. The incumbent also handles special assignments and other duties as required.

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

PERCENTAGE OF TIME SPENT	DUTIES
	ESSENTIAL JOB FUNCTIONS
35%	Serves as the lead team member and expert resource responsible for providing technical advice to team members. Reviews and approves team members' work, assignments, and adjustments made in the system. Acts as the liaison with governmental, private, and other agencies and entities to effectively resolve complex issues and ensure proper application of the tax laws.
20%	Works the more difficult and complex assignments and other selected cases requiring a high level of expertise. Acts as team liaison with other sections in the agency. Handles cases involving legal issues and those requiring interagency coordination.
20%	Coordinates special projects for the section. Recommends, develops, and implements procedures for the tax and fee programs mandated by legislation. Analyzes new legislation as to its effect on branch functional areas. Revises/originates pamphlets, special notices, return forms and other informational releases to the public and department team members.
10%	Prepares sensitive correspondence and/or reports for executive management and elected officials on technical issues pertaining to the various programs administered by the agency. Provides advisory services and assistance to field offices and the public on technical matters when needed.
10%	Trains new team members on tax law application and program policies and procedures.
	MARGINAL JOB FUNCTIONS
5%	Performs other job-related duties, as required. Acts as the BTA I in their absence.

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.

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: 02/26/2026	**C&P Analyst Initials: LLM**