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**	
DIVISION/OFFICE/UNIT		SPECIFIC LOCATION ASSIGNED TO	
PPDD/HOB/Consumer Use Tax Section		**Sacramento, 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- 474- **1975**- 005	

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 a Business Taxes Administrator I, the Tax Technician (TT) III performs a variety of the most complex technical duties in the TT series. The TT III incumbent works with little day-to-day supervision performing the following duties: return maintenance, processing, adjusting, and staging billings; reviewing account information, correspondence, maintaining suspended payments, resolving unapplied payments and documents to determine action(s) to be taken. Additionally, the TT III serves as an expert resource responsible for the more sensitive and complex work to apply laws, regulations, policies, and procedures to the return processing and maintenance workload of the unit. Work assignments must be processed in a timely manner and the appropriate detailed comments entered on accounts. The incumbent performs duties pertaining to 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
45%	**Return Processing/Return Analysis/Consumer Use Tax Functions** Initiates and stages billings, return maintenance, and taxpayer assistance activities: Maintains returns and payments on accounts through the analysis and maintenance of related work queues in the system involving work items and payment corrections. This may often require verbal and/or preparation of written communication with taxpayers and California Department of Tax and Fee Administration field offices. These activities include, but are not limited to the following: • Examines returns, reports and schedules to determine errors in computations, partial or non-remittance returns, late charges, and dishonored checks. • Inspects and adjusts liabilities to correct balances based upon additional information received from the taxpayer or field office. • Determines proper disposition of unapplied payments and takes the necessary actions. This may sometimes include the reconstruction of closed accounts. • Examines and reviews prepayment related queues and suspense work items for large amounts to assure accuracy and allocation of claimed payments and initiates correspondence and/or stage billings regarding apparent prepayment problems. • Approves and processes requests for extensions, declarations of timely mailing, and bank error letters received from taxpayers. • Prepares routine correspondence to be issued to taxpayers. • Initiates and stages refunds of overpayments of penalty/interest, overpayments of tax, and erroneous payments.
40%	**Return Processing/Return Analysis/Consumer Use Tax Functions** Account Maintenance Activities: Clears delinquencies and addresses questionable return filings on accounts through the analysis/maintenance of return information, and payments and through verbal and written communication with taxpayers and field

	office team members. These activities include, but are not limited to the following: • Processes account adjustment notice transfers through analysis of account information utilizing the department's system. • Responds to correspondence and telephone inquiries relating to return matters from field office team members and taxpayers verbally and in writing. • Resolves questionable return filings through analysis of account information, telephone calls to taxpayers, and written correspondence to taxpayers and field offices.
10%	**Return Analysis Unit Functions** Answers telephone and written inquiries regarding the Electronic Funds Transfer (EFT) payment processing and related issues including, but not limited to: • EFT reporting methods. • Transmitting, cancelling, and inquiring about EFT payments. • Due dates and settlement dates. • Authorization of taxpayers to make a Fedwire payments to receive timely settlement dates. • Request for relief options, and all other aspects relating to the EFT process. **AND/OR** Provides taxpayer support and assistance on the Customer Service Center telephone system. **OR** **Return Processing Branch Functions** Provides taxpayer support and assistance on the Customer Service Center telephone system. **OR** **Consumer Use Tax Section Functions** Reviews incoming accounts/cases and documents from other units within the department to determine further action and follows up when necessary. Contacts counties and/or taxpayers to verify the purchase price and confirm the location of the vehicle, vessel, or aircraft.
	MARGINAL JOB FUNCTIONS
5%	Assists in training new team members, as needed. 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.

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: 11/17/2026	**C&P Analyst Initials: ANS**