California Department of Tax and Fee Administration

DUTY STATEMENT

☒ CURRENT
☐ PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION **Business Taxes Compliance Specialist**		WORKING TITLE **Business Taxes Compliance Specialist**	
DIVISION/OFFICE/UNIT **PPDD/HOB/Consumer Use Tax Section**		SPECIFIC LOCATION ASSIGNED TO **Sacramento, CA**	
SEERA DESIGNATION **Rank & File**	BARGAINING UNIT **01**	WORK WEEK GROUP **02**	CERTIFICATES REQUIRED **None**
FINGERPRINTS/BACKGROUND CHECK REQUIRED ☒ Yes ☐ No	BILINGUAL POSITION ☐ Yes ☒ No	SUPERVISION EXERCISED **May act as lead**	
INCUMBENT		POSITION NUMBER *(Agency-Unit-Class-Serial)* **291-474-8694-**007	

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 difficult reviews of compliance and technical duties related to the administration of use tax on vehicles, vessels, aircraft, and mobile homes purchased from non-dealers for use in California. Reviews and analyzes cases, provides technical guidance, and acts as lead to journey-level team members.

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%	Performs in-depth research on the more difficult and complex cases requiring experience working with and knowledge of the tax laws and regulations. Reviews and analyzes source information and evidence submitted to document exemptions claimed on use tax return filings. Initiates verbal or written communication with taxpayers and public officials under conditions requiring the utmost tact and good judgement. Serves as technical resource to team members on special projects and areas regarding the application of various tax law, regulations, and policies.
25%	Reviews, reconciles, and validates system generated reports to ensure completion of online activity related to registration, tax return filings, payments, case follow-ups, and account closures. Prepares, reviews, and approves summary analyses of disputed case issues and actions taken by team members, makes recommendations to the BTA I on the handling of such scenarios.
10%	Performs reviews to ensure that cases are completed timely within established guidelines and advises taxpayers and/or their representative of any further requirements. Reviews, approves or denies requests for cancellation or adjustments to billings.
10%	Prepares correspondence and reports on difficult and sensitive tax matters for the section supervisor. Provides guidance to team members on the required course of action to be taken.
10%	Acts as lead person and provides on-the-job training to team members. Identifies process improvements and develops workflows. Creates and maintains written procedures on new and existing processes.
	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: 7/10/2026	**C&P Analyst Initials: ANS**