

# DUTY STATEMENT

SCHEDULE TO BE WORKED/WORKING HOURS <b>Monday-Friday 8:15 am-5:15 pm</b>		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION <b>Business Taxes Representative</b>		WORKING TITLE <b>Business Taxes Representative</b>	
DEPARTMENT/DIVISION/DISTRICT/UNIT <b>External Affairs: Customer Service Center</b>		SPECIFIC LOCATION ASSIGNED TO <b>Sacramento California</b>	
SEERA DESIGNATION <b>Rank and File</b>	BARGAINING UNIT <b>01</b>	WORK WEEK GROUP <b>2</b>	CERTIFICATES REQUIRED <b>No</b>
FINGERPRINTS REQUIRED <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	BILINGUAL POSITION <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	SUPERVISION EXERCISED <b>None</b>	
INCUMBENT		POSITION NUMBER (Agency-Unit-Class-Serial) <b>290-316-8690-005</b>	

*The mission of the State Board of Equalization is to serve the public through fair, effective and efficient tax administration.*

**POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS**

Under the close supervision of a Business Taxes Administrator I, the Business Taxes Representative learns all phases of tax compliance, licensing and law, rule and regulation administration. The incumbent provides advisory service to the employees, public and taxpayers concerning the various tax programs administered by the BOE. The duties include but are not limited to, providing training to existing and new employees, reviewing work processed for accuracy and ensures compliance with sales and use tax laws, mobile telephone surcharge laws, rules and guidelines provided by the BOE. Handles the questions concerning online services or other account specific questions and prepares written response to the public or other government agencies via e-mail or other means. Works with IT staff with troubleshooting PC/Phone issues.

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

PERCENTAGE OF TIME SPENT	DUTIES
50%	<p><b><u>ESSENTIAL JOB FUNCTIONS</u></b></p> <p>Responsible for delivery of new employee tax technician trainings; instructs employees and taxpayers regarding the interpretation and application of the sales and use tax laws and mobile telephone surcharge laws, rules, regulations and statutes. Assigns, reviews and tracks non call work provided to new employees receiving training, including review of closeouts, account maintenance, tax area code assignment, and other non-call work assigned to tax technicians; assists tax technicians with account maintenance, online services and analyzing account information to determine what action is necessary. Serves as the internal representative responsible for contacting Investigations or Internal Security and Audit Division concerning accounts that have been flagged.</p>
25%	<p>Provides advisory service and educates new employees and taxpayers on the various programs administered by the BOE, including new programs such as the mobile telephone surcharge requiring regulatory charges; assists with the preparation of sales and use tax returns and applicable reporting forms and schedules; reviews existing call center procedures to ensure compliance with disclosure requirements for release of information.</p>
20%	<p>Prepares written correspondence and analysis for management or other Board staff in response to inquiries made to elected officials, executive management and the public. Serves as a backup to the Business Taxes Compliance Specialist in call monitoring of new tax technicians and answering internet e-mails from the public. Works with IT staff with troubleshooting PC/Phone issues.</p>
5%	<p><b><u>MARGINAL JOB FUNCTIONS</u></b></p> <p>Other job-related duties as needed.</p>

**WORK ENVIRONMENT OR PHYSICAL ABILITIES REQUIRED FOR THE JOB (if applicable):**

**Work Environment:**

- Be able to work in a high rise building
- Work in an office setting with an open floor plan

**Physical Abilities:**

- 

**Additional Requirements/Expectations:**

- Travel, including some overnight stays

***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

**HRD Approval Date:****C&P Analyst Initials:**