

# DUTY STATEMENT

SCHEDULE TO BE WORKED/WORKING HOURS <b>Monday - Friday 8:15-5:15 pm</b>		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION <b>Tax Technician I</b>		WORKING TITLE <b>Tax Technician I</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>4</b>	WORK WEEK GROUP <b>2</b>	CERTIFICATES REQUIRED <b>N</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>290-316-1973-XXX</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 the Business Taxes Administrator, the Tax Technician I learns and performs the less difficult and complex technical work. The incumbent responds to the most routine toll-free number telephone inquiries regarding tax laws, regulations, procedures, policies, and general Board information. The incumbent may be eligible to receive additional compensation each month for public contact through the telephone per Pay Differential # 186.

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

PERCENTAGE OF TIME SPENT	DUTIES
85%	<p><b><u>ESSENTIAL JOB FUNCTIONS</u></b></p> <p>Responds to general information calls at the BOE's toll-free number; responds to basic, routine tax program inquiries that do not require knowledge of auditing standards and regulatory interpretation/debate; clarifies program requirements on a variety of tax program procedures and operations; prints, reviews, faxes and/or mails out duplicate tax returns to taxpayers upon request; utilizes desk reference manual and official Board publications in responding to inquiries; handles the less complex calls from the general public, taxpayers, and private and governmental entities.</p>
10%	<p>Performs basic permit registration, account maintenance, and permit closeout duties. Performs fax duties and mail distribution; answers incoming office phone lines; performs back up clerical functions.</p>
5%	<p><b><u>MARGINAL JOB FUNCTIONS</u></b></p> <p>Documents telephone and written inquiries for which standard responses have not been developed or included in the Desktop Reference Electronic Access Manual (DREAM), refers to these questions to program management or follow-up with tax program staff; and as needed, performs other job-related duties to cover workload.</p>

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

**Work Environment:**

-

**Physical Abilities:**

- 

**Additional Requirements/Expectations:**

- 5% Incidental travel required
- Perform other job-related duties as required

***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:**