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 Auditor		**Tax Auditor**	
DIVISION/OFFICE/UNIT		SPECIFIC LOCATION ASSIGNED TO	
FOD/		**, CA**	
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	**None**	
INCUMBENT		POSITION NUMBER *(Agency-Unit-Class-Serial)*	
		291-xxx -4267-xxx	

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 close supervision of the Supervising Tax Auditor, the Tax Auditor (TA) conducts the least to moderately difficult field audits. The TA audits accounts, attends basic tax law and audit training classes, makes audit appointments, meets with taxpayers and their representatives, explains the audit findings, and prepares appropriate audit reports. This position is designated as "Mobile Worker" per California Department of Tax and Fee Administration (CDTFA) Telework Policy and Guidelines and requires travel, which may include overnight.

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

PERCENTAGE OF TIME SPENT	DUTIES
	ESSENTIAL JOB FUNCTIONS
75%	Makes preliminary preparations such as reviewing the prior audit and the taxpayer's file, makes the audit appointment, and reviews the laws, regulations and rulings pertinent to the assignment. The TA also develops the audit program and determines the appropriate audit procedures to be performed and the scope of testing. Performs audit procedures such as observing the taxpayer's operations, examines the books and records, conducts specialized tests and sampling of transcripts, examines supporting detail, and prepares schedules and verification comments. Promptly informs the taxpayer of the need for any additional support, explains what the deficiencies are, and the type of support needed, establishes deadlines for obtaining the data, and examines the supporting documentation obtained. Explains the audit findings to the taxpayer and their representatives, provides copies of the audit work papers, explains the application of the law and the audit procedures used, and prepares a report of discussion when appropriate.
10%	Attends training classes in Sales and Use Tax Law and auditing procedures relative to tax auditing. Prepares weekly and monthly time sheets accounting for all assignments and work performed, audit status reports for all work in process, a variety of forms to process work, and other reports designated by management.
5%	Monitors, inputs, and retrieves information from CDTFA network and information systems. Items may include audit leads, data upload/download, statute dates, resale verification, and Local Area Network back up of working papers.
5%	Attends supervisors' and appeals conferences involving non-concurred audits and participates in other general training classes.
	MARGINAL JOB FUNCTIONS
5%	Performs other job-related duties, supporting the audit program activities as required.

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

Work Environment:

- May work in a high-rise building

Physical Abilities:

- Ability to transport materials weighing up to thirty (30) pounds
- Work long irregular hours, both in and out of the office in various locations statewide
- Ability to access and use a personal computer, office equipment, calculator, and other electronic equipment

Additional Requirements/Expectations:

- Travel, which may include overnight
- Travel to complete training requirements, which may include overnight

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: 09/10/20	**C&P Analyst Initials: AS**