



Proposed

HR Date: 05/24/2022

HR Initials: jcs

Duty Statement

Request for Personnel Action (RPA) Number 2122-03870 through 2122-03879	Effective Date
Classification Title Tax Auditor	Position Number 564-371-4362-990
Working Title Tax Auditor	Bureau and Section National Business Audit Bureau

Our mission is to help taxpayers file timely and accurate tax returns, and pay the correct amount to fund services important to Californians. In order to support this mission, FTB employees strive to develop in CalHR's Core Competencies: Collaboration, Communication, Customer Engagement, Digital Fluency, Diversity and Inclusion, Innovative Mindset, Interpersonal Skills, and Resilience. Core competencies are the knowledge, skills, and behaviors which are foundational to all state employees regardless of classification.

General Statement

Under supervision of an FTB Administrator, the incumbent is responsible for learning all phases of tax audit work while conducting the least-to-moderately difficult audits or assisting in the more difficult audits of taxpayers to determine the correct amount of tax liability in accordance with the Federal & California Tax Laws, audit standards, Audit Regulations, Taxpayer Bill of Rights, resource considerations, policies, and procedures.

Essential Functions

Percentage	Description
45%	Conduct field audits of taxpayer's books and records using a variety of FTB resources and a Personal Computer. Plan, organize, and manage audit inventory to ensure the audits are completed within the time frames indicated in the Audit Regulations and the Taxpayer Bill of Rights. Gather substantiation and prepare audit reports, documenting the information developed during the audit. Record audit progress in PASS (Professional Audit Support System). Analyze facts and make appropriate audit determinations based on research and application of the tax laws, Board of Equalization and tax court decisions, legal memoranda and opinions, department policy and other applicable authority.
45%	Confer with taxpayers and/or their legal representatives to request and discuss pertinent information by mail, telephone, or in person. Communicate audit findings to the taxpayer and/or their legal representative, both in writing and verbally.

Marginal Functions

Percentage	Description
10%	Participate in special audit-related assignments and projects. Attend tax related seminars as a representative of the FTB, and training sessions that are provided in house or off-site to continue to develop knowledge and skills.

Employee: I confirm that I have read and understand the described duties and functions of this position.

Name (Print)

Signature

Date

Supervisor: I certify that the above information accurately represents the described duties and functions of this position.

Name (Print)

Signature

Date