

California Department of Tax and Fee Administration

DUTY STATEMENT

☐ CURRENT
☐ PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION Business Taxes Specialist II		WORKING TITLE Business Taxes Specialist	
DIVISION/OFFICE/UNIT BTFD/ACB/Audit Examination Branch		SPECIFIC LOCATION ASSIGNED TO Sacramento, CA – Headquarters	
SEERA DESIGNATION Rank and File	BARGAINING UNIT 01	WORK WEEK GROUP 2	CERTIFICATES REQUIRED None
FINGERPRINTS/BACKGROUND CHECK REQUIRED ☒ Yes ☐ No	BILINGUAL POSITION ☐ Yes ☒ No	SUPERVISION EXERCISED Act as lead	
INCUMBENT		POSITION NUMBER (Agency-Unit-Class-Serial)	
<i>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.</i>			
POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS Under the general supervision of a Business Taxes Administrator III, the incumbent is responsible for coordinating, monitoring, and evaluating multiple tax and fee programs for both the Internal Revenue Service (IRS) and the California Department of Tax and Fee Administration (CDTFA). The Business Taxes Specialist II (BTS II) organizes, coordinates, and oversees the largest and most complex multi-tax and fee programs involving field audits performed by multiple audit teams. The BTS II provides training to audit team members and discusses the application of tax and fee laws with taxpayers. The BTS II collaborates with the Internal Revenue Service (IRS), CDTFA management and team members, as well as accountants, tax managers, accounting firms, attorneys, and corporate officers representing large and complex companies. The BTS II serves as a liaison with the CDTFA, IRS, and other Joint Operations Center (JOC)-participating states. The BTS II develops anomalies used to generate audit leads received from the JOC. In-state and out-of-state travel may be required up to 75% of the time. Candidate must be able to perform the following essential job functions with or without reasonable accommodation.			
PERCENTAGE OF TIME SPENT	DUTIES		
55%	<u>ESSENTIAL JOB FUNCTIONS</u> Serves as lead over a team of experienced auditors in performing the most complex field audits of sophisticated national and international companies located throughout the United States. Audit assignments include conducting concurrent field audits of multiple tax and fee programs. These multi-program audits require the examination of highly sophisticated, interrelated companies, including large publicly traded international corporations. Audit procedures include interpreting and analyzing business records such as multiple sales agreements, complex legal documents, and electronic financial records. Reviews and analyzes electronic data received from taxpayers and other governmental agencies through the system. Provides overall management and coordination of multiple audits to ensure timely and efficient completion. Reviews the work of auditors in Audit Examination Branch (AEB) to ensure adherence to departmental policies and procedures and to confirm that all audits progress in a timely manner for all programs administered by CDTFA.		
10%	Acts as a liaison with other state agencies and the IRS in preparing joint audits. Resolves issues requiring telephone or written correspondence, including analyzing documentation relevant to both CDTFA and IRS program requirements.		
10%	Uses third party information and investigative and verification techniques to determine whether the correct amount of tax or fee was reported and paid. Compares various data sources for audit selection purposes using various methods and analytical software tools.		
10%	Recommends statutory, regulatory, policy, or procedural changes as needed, following established departmental guidelines. Drafts regulations, legislation, and proposed policy updates. Investigates problem areas in existing policies and procedures and proposes and implements recommended improvements. Prepares or assists in the preparation of Budget Change Proposals (BCPs). Establishes and reviews contracts for data and information with outside agencies. Conducts 10-day discussions on non-concurred audits, refunds, and petitioned cases.		

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5%	Develops and coordinates the preparation of reports to management regarding the status of new and existing policies and procedures. Drafts issue papers on matters affecting programs administered by the CDTFA.	
5%	<u>MARGINAL JOB FUNCTIONS</u> Participates on a variety of task forces addressing issues related to organizational functions, tax program administration, policies and procedures, and customer service.	
5%	Performs other job-related duties as assigned.	
WORK ENVIRONMENT OR PHYSICAL ABILITIES REQUIRED FOR THE JOB <i>(if applicable):</i>		
Work Environment: Depending on your work location, you may be working in a high-rise building.		
Physical Abilities: - Ability to transport materials weighing up to twenty (20) pounds with or without reasonable accommodation. - Ability to access and use a laptop, office equipment, and/or telephone system daily. - Ability to work long and irregular hours, both in and out of the office at various locations statewide and outside of California.		
Additional Requirements/Expectations: - Travel may be required in-state and out-of-state up to seventy-five percent (75%) of the time, and may include evenings, weekends, and/or overnight travel. - The position may be called to testify in administrative hearing matters and criminal court proceedings.		
<i>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.</i>		
PRINT EMPLOYEE NAME	EMPLOYEE'S SIGNATURE	DATE
<i>I certify that the above accurately represents the duties of the position and that I have reviewed these duties with the above-named employee.</i>		
PRINT SUPERVISOR NAME	SUPERVISOR'S SIGNATURE	DATE
HRB Approval Date: 07/13/2026	C&P Analyst Initials: LLM	