

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 I		WORKING TITLE Business Taxes Specialist	
DIVISION/OFFICE/UNIT PPDD/TPB/AIS/Audit Support Unit		SPECIFIC LOCATION ASSIGNED TO	
SEERA DESIGNATION Rank & File	BARGAINING UNIT R01	WORK WEEK GROUP 2	CERTIFICATES REQUIRED None
FINGERPRINTS/BACKGROUND CHECK REQUIRED ☒ Yes ☐ No	BILINGUAL POSITION ☐ Yes ☒ No	SUPERVISION EXERCISED May act as a lead	
INCUMBENT		POSITION NUMBER (Agency-Unit-Class-Serial) 291 - 464- 4380 -	
<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 Supervising Tax Auditor II, the Business Taxes Specialist (BTS) I, Audit Support Unit (ASU) is responsible for independently completing assignments that are complex or sensitive in nature as requested by the Section Supervisor, the Tax Policy Bureau (TPB) Chief, and the Deputy Director of the Processing, Policy, and Data Division (PPDD). The BTS I performs specialized and complex tasks which includes researching, evaluating, and providing recommendations to sensitive legal and audit issues. The BTS I may act in a lead capacity and as a highly skilled technical consultant on large complex projects related to various tax and fee programs supported by the ASU. Candidate must be able to perform the following essential job functions with or without reasonable accommodation.			
PERCENTAGE OF TIME SPENT	DUTIES		
40%	<u>ESSENTIAL JOB FUNCTIONS</u> Independently researches and evaluates technical, complex, and sensitive legal and audit issues which California Department of Tax and Fee Administration (CDTFA) Office Administrators or Headquarters managers are unable to resolve. Consults with the Legal Division to resolve complex and unique legal issues. Formulates solutions to these legal and audit issues and prepares reports with recommendations and alternatives for action, as required, to the TPB Chief, or executive management.		
30%	Acts as a highly skilled technical consultant on audit practices, policies, and procedures. Directs, coordinates, and controls complex projects, to include determining the project scope and methodology. These projects may have overlapping audit, compliance, administrative, and legal issues. As a project leader, makes decisions, plans, organizes, and directs the work of others; independently researches and resolves complex and comprehensive tax audit and program issues; interprets policies and assists in establishing or modifying programs or policies; develops and provides written procedures to the statewide audit team members; and provides advice to CDTFA management on proposed statutory, policy, and procedural changes.		
25%	Independently researches and prepares suggested responses to complex legal and audit questions raised by taxpayers, other states, multi-state tax commission, or other groups or associations. Includes preparing requests for guidance from the Legal Division on issues where research does not disclose adequate reference to draw a legally supportable conclusion or recommendation. Responds, verbally and/or in writing, to questions from executive management, CDTFA team members, the media, taxpayers, and others regarding a wide range of law and policy topics.		
5%	<u>MARGINAL JOB FUNCTIONS</u> As directed, represents higher levels of authority at meetings, conferences, and hearings and acts as a PPDD liaison with other agencies. Takes actions, makes recommendations, and prepares reports as necessary because of the meetings and conferences. As needed, performs other job-related duties.		

291 - 464 - 4380 -**WORK ENVIRONMENT OR PHYSICAL ABILITIES REQUIRED FOR THE JOB** *(if applicable):***Work Environment:**

- Depending on your work location, you may be working in a high-rise building.

Physical Abilities:

- Ability to access and use a laptop, office equipment, and/or telephone system daily.
- Ability to remain in a stationary position, consistent with office work, for extended periods of time.

Additional Requirements/Expectations:

- Travel may be required up to five percent (5%) of the time.

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: 2.23.2026**C&P Analyst Initials: JVR**