

California Department of Tax and Fee Administration

DUTY STATEMENT

☐ CURRENT
☐ PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION Supervising Tax Auditor III		WORKING TITLE Revenue & Jurisdiction Services Program Supervisor	
DIVISION/OFFICE/UNIT CDTFA / FMD / FOB / Local Revenue Branch		SPECIFIC LOCATION ASSIGNED TO Sacramento HQ	
SEERA DESIGNATION Supervisory	BARGAINING UNIT	WORK WEEK GROUP E	CERTIFICATES REQUIRED None
FINGERPRINTS/BACKGROUND CHECK REQUIRED ☒ Yes ☐ No	BILINGUAL POSITION ☐ Yes ☒ No	SUPERVISION EXERCISED Full-Time	
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 direction of the Business Taxes Administrator III, the Supervising Tax Auditor III (STA III) is responsible for statewide leadership of the Revenue & Jurisdiction Services Program within the Local Revenue Branch. The incumbent oversees statewide allocation, distribution, reconciliation, and fiscal governance functions supporting more than \$26 billion in annual local tax distributions across 1,000+ jurisdictions. The STA III serves as CDTFA's statewide authority for allocation policy, CROS system governance, legislative implementation, cross-divisional coordination, and resolution of complex statewide allocation issues. 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> STATEWIDE PROGRAM LEADERSHIP, POLICY AUTHORITY & SYSTEM GOVERNANCE Provides statewide program leadership ensuring uniform statewide application of statutes, ordinances, and policies. Oversees statewide distribution exceeding \$26B annually, ensuring fiscal accuracy and compliance. Directs statewide reconciliation of Revenue and Disbursement Ledgers. Leads resolution of systemic allocation anomalies, ordinance defects, and CROS mispostings. Designs and governs CROS allocation logic and disbursement ledger. Develops and approves statewide system corrections (SQRs). Leads statewide implementation of local tax legislation. Provides executive-level fiscal and allocation reporting.		
30%	SUPERVISORY LEADERSHIP, STAFF DEVELOPMENT & OPERATIONAL OVERSIGHT Supervises subordinate supervisors, specialists, and professional staff. Develops staffing patterns and directs hiring, training, and performance evaluations. Oversees statewide workload metrics, reconciliation output, system work items. Ensures cross-divisional coordination with Legal, Technology Services, Audit, and Executive.		
10%	EXECUTIVE ADVISORY FUNCTIONS, STAKEHOLDER ENGAGEMENT & ISSUE RESOLUTION Advises Executive Management on allocation statutes, fiscal impacts, and systemic discrepancies.		
5%	<u>MARGINAL JOB FUNCTIONS</u> Performs other job-related duties as required including hiring panels, statewide trainings, and technical analysis. Ensures staff access to appropriate manuals, tools, and system documentation. Immediately addresses staff health and safety concerns.		
WORK ENVIRONMENT OR PHYSICAL ABILITIES REQUIRED FOR THE JOB (if applicable):			
Work Environment: High Rise Building.			

Physical Abilities:

- Ability to use computer and office equipment.
- Ability to remain in a stationary position for extended periods.

Additional Requirements/Expectations:

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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: 7/22/26

C&P Analyst Initials: AC