

California Department of Tax and Fee Administration

DUTY STATEMENT

☐ CURRENT
☐ PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION Tax Auditor		WORKING TITLE Tax Auditor	
DIVISION/OFFICE/UNIT FMD/FOB/Local Revenue Branch		SPECIFIC LOCATION ASSIGNED TO Sacramento, CA – Headquarters Office	
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 None	
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 This is the recruiting and training level in the Tax Auditor series. Under the general direction of the Supervising Tax Auditor (STA II), in the Local Revenue Branch (LRB), the Tax Auditor (TA) is responsible for analyzing and making recommendations on the petitions filed (reallocations and tax deficiencies) from local and special taxing jurisdictions and consultants for accuracy and completeness. This includes written correspondence or telephone contacts with taxpayers and local jurisdictions and represented consultants. It is the TA responsibility to ensure the inquiries are timely investigated and resolved, including billings and response letters. The TA also trains lower level staff, reviews and approves Tax Technician reallocations and/or redistributions and billings, and evaluates tax distributions that should be investigated. 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> Creates inquiry cases in CROS, investigates and responds to claims (inquiries) of misallocations filed by cities, counties, special taxing jurisdictions, and/or their consultants under the Bradley-Burns Local Sales and Use Tax Law and Transactions and Use Tax Law. If it is determined that a reallocation and/or billing is required, adjustments are made to the account on the CROS system. Investigates and reviews anomalies in reporting by taxpayers to transit district areas and local tax issues. Based on complexity of taxpayer reporting and problems/analysis required, performs analysis and determines proper action if redistributions or deficiencies are warranted based on inquiries filed, which may also include corresponding CDTFA-75 (reallocation of local/district tax cases) assignments. Initiates procedural changes to encompass changes in taxpayer reporting to insure consistency and accuracy in local/district tax allocations/distributions. Prepares billings for cases when warranted of amounts less than \$5,000. Works on special projects as needed caused by changes in laws, regulations, procedures, and other areas impacting local and district taxes.		
30%	Provides technical and procedural guidance, and training, to new Tax Auditors and Tax Technicians for tax return processes, and adjustments as necessary. Oversees completed workload for Tax Technicians, including approval of fund transfers less than \$5000. Prepares go-backs on rejected fund transfers that require further investigation or clarification prior to approving the recommended reallocations/redistributions. Prepares reallocation adjustments (local and district tax) from field staff recommended from Audits.		
10%	Ensures that petitions filed meet the minimum standards required by the regulation. Correspond with jurisdictions and their representatives to perfect unsatisfactory submissions. Respond to petitions based on Branch policies and procedures.		

5%

MARGINAL JOB FUNCTIONS

Performs other duties as assigned including, but not limited to, special projects, system testing as needed, acting as Remote Agent to assist Taxpayer Information Section during high call volume on the application of tax law with taxpayers, and assist the STA II and other California Department of Tax and Fee Administration (CDTFA) units.

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

- May work in a high-rise building.

Physical Abilities:

-

Additional Requirements/Expectations:

-

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: 7/1/2026

C&P Analyst Initials: AC