

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 Headquarters – Sacramento, CA	
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 (TA) series. Under the close supervision of the Supervising Tax Auditor (STA) I, the Tax Auditor, in the Local Revenue Branch (LRB), reviews taxpayer sales and use tax returns, claims for refund, and discusses the application of tax laws with taxpayers and staff. The TA interprets and applies sales and use tax law, transactions tax law, regulations, and annotations to ensure taxpayer compliance. The TA analyzes sales and use tax returns, reviews taxpayer correspondence, communicates with taxpayers and district office staff through verbal and written communication, establishes determinations for additional tax, prepares reallocations of local and district taxes, interest and penalties amounts due, performs return maintenance based on investigation findings, processes relief from penalty cases and makes recommendations, and assists billing and adjustment staff with more complex cases. 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> <u>Billing and Adjusting of Accounts Receivable; Local/District Reallocations; Claims for refund; Delinquency Maintenance; and Return Processing:</u> Reviews proposed transaction and use tax liabilities initiated by LRB staff, makes changes as needed, including, but not limited to local and district reallocations, and issues determinations; resolves unapplied payments; resolves return suspense items; provides assistance to lower level staff; timely completes and processes billings, return review and analysis, reallocations, refunds, performs return maintenance based on investigation findings, processes relief from penalty cases and other assignments.		
40%	<u>Desk Review Activities, Analysis of Questionable Returns, and Taxpayer Correspondence:</u> Analyzes sales and use tax returns and schedules to determine acceptability of deductions, local and district tax reporting/allocation, and proper tax computation. Initiates assignments and investigates cases as assigned. Interprets and applies sales and use tax law, local tax law, transactions tax law, regulations, and annotations to ensure taxpayer compliance and addresses taxpayer inquiries. Resolves identified questionable return problems through telephone contact, written correspondence, including replies and follow-ups to initial correspondence, and issues determinations. Processes return and payment maintenance to establish and adjust taxpayer assessments for tax, interest and/or penalty. Professionally communicates, both orally and in writing, with taxpayers and district office staff to resolve return reporting issues; assists with return preparation and local and district tax reporting; addresses questions relating to the billing, adjustment, analysis, delinquency maintenance, and tax law.		

5%

MARGINAL JOB FUNCTIONS

Other job-related duties:

Performs special assignments and other job-related duties as assigned, including acting as Remote Agent to assist Taxpayer Information Section during high call volume on the application of tax law with taxpayers, assists the Cashiers Section with processing mail received from taxpayers, and assists the STA I and/or 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 high-rise building.
- Standard office environment with artificial lighting and controlled temperature.

Physical Abilities:

- Requires being in a stationary position, consistent with office work, for extended periods of time.
- Daily use of personal computer, office equipment, and/or telephone.

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: 9/8/26

C&P Analyst Initials: AC