

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 II	
DIVISION/OFFICE/UNIT PPDD/TDAB/Business Analytics Section		SPECIFIC LOCATION ASSIGNED TO	
SEERA DESIGNATION Rank and file	BARGAINING UNIT	WORK WEEK GROUP 2	CERTIFICATES REQUIRED None
FINGERPRINTS/BACKGROUND CHECK REQUIRED ☒ Yes ☐ No	BILINGUAL POSITION ☐ Yes ☒ No	SUPERVISION EXERCISED May act as lead	
INCUMBENT		POSITION NUMBER (Agency-Unit-Class-Serial) 291-442-4379-	
<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 Supervising Tax Auditor (STA) III, Business Analytics Section (BAS), the Business Taxes Specialist (BTS) II serves as the technical lead on more complex business analytics, operational policy, and business rule development projects. The incumbent researches, develops, implements, and maintains business rules and operational processes used to identify taxpayer reporting issues and improve voluntary compliance. The BTS II leads technical assignments, provides guidance to team members, reviews analytical work products, and serves as a subject matter expert on return analytics, account selection methodologies, and compliance initiatives. The BTS II collaborates with internal and external stakeholders to identify opportunities for process improvements, assists with operational policy development, and researches more complex tax issues across various tax and fee programs, and other program areas, as needed. The BTS II reviews field billing orders (FBOs) generated within BAS and issues related billings for various tax and fee programs, ensuring accuracy and consistency with established audit procedures. The BTS II has full authority to return FBOs for additional clarification or for correction, and works with the Petitions Section and other petitions-related program areas on relevant petition items by reviewing supporting documentation, validating billing and audit information, and providing technical input to support accurate and timely petition resolutions. The BTS II also provides technical updates and recommendations to the STA III regarding ongoing projects, workload trends, and emerging compliance issues. Candidate must be able to perform the following essential job functions with or without reasonable accommodation.			
PERCENTAGE OF TIME SPENT	DUTIES		
60%	<u>ESSENTIAL JOB FUNCTIONS</u> Serves as the technical lead on more complex business analytics, operational policy, and business rule development projects. Researches, develops, implements, and maintains business rules and operational processes used to identify taxpayer reporting issues and improve voluntary compliance. Leads technical assignments, provides guidance to team members, reviews analytical work products, and serves as a subject matter expert on return analytics, account selection methods, and compliance initiatives. Works with internal and external stakeholders across various tax and fee programs, and other program areas, to identify opportunities for process improvements, supports operational policy development, and researches complex or emerging tax issues.		
20%	Reviews FBO documents to ensure they are accurate, complete, and follows California Department of Tax and Fee Administration (CDTFA) policies and procedures. Prepares, reviews, and approves billings to ensure they are correct and meet all established requirements. Works with team members, management, and petitions-related program areas to resolve issues, verify supporting documentation, and confirm that adjustments and billings are properly supported. Provides clear feedback when corrections are needed and helps maintain consistency and accuracy across all billing and FBO processes.		
15%	Supports section operations through coordination with other CDTFA program areas, participates in meetings or workgroups, develops reference materials, and assists with training or process improvement efforts. Provides updates and technical recommendations to the STA III on project status, workload trends, and emerging compliance issues.		

5%

MARGINAL JOB FUNCTIONS

Performs other job-related duties as required.

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: 8.10.2026

C&P Analyst Initials: JVR