California Department of Tax and Fee Administration

DUTY STATEMENT

☐ CURRENT
☒ PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION		WORKING TITLE	
Supervising Tax Auditor II		**Supervising Tax Auditor**	
DIVISION/OFFICE/UNIT		SPECIFIC LOCATION ASSIGNED TO	
Field Operations Division/		Riverside, CA	
SEERA DESIGNATION	BARGAINING UNIT	WORK WEEK GROUP	CERTIFICATES REQUIRED
Supervisory	**01**	**E**	**None**
FINGERPRINTS/BACKGROUND CHECK REQUIRED	BILINGUAL POSITION	SUPERVISION EXERCISED	
☒ Yes ☐ No	☐ Yes ☒ No	**Yes**	
INCUMBENT		POSITION NUMBER *(Agency-Unit-Class-Serial)*	
		291- 053 **-4277-** 901	

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.

POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS

Under the general direction of the Supervising Tax Auditor (STA) III, Audit Principal, the Supervising Tax Auditor (STA) II supervises an audit team conducting the most difficult audits within the unit, including specialized civil tax fraud audits relating to the various taxes administered by the California Department of Tax and Fee Administration (CDTFA). The STA II participates in the hiring process, trains staff, plans, assigns and evaluates the work performed by these auditors, and communicates with taxpayers regarding issues, solutions, tax laws, and the appeal process. The STA II also serves as Audit Selector and attends Petition Hearings and Appeals conferences. The STA II may act for the Audit Principal and handle special projects as needed.

Positions within California require the incumbent to travel up to 50% of the time, which includes overnight travel.

Positions outside of California require the incumbent to travel up to 50% of the time out of state, which includes overnight travel.

Candidate must be able to perform the following essential job functions with or without reasonable accommodation.

PERCENTAGE OF TIME SPENT	DUTIES
	ESSENTIAL JOB FUNCTIONS
40%	Supervises an audit team comprised of Business Taxes Specialist I/II, Associate Tax Auditor and Tax Auditor level staff. Organizes teams of auditors. Plans, assigns, and evaluates the workload for the auditors. Confers with auditors regarding audit problems encountered, and tracks progress of assignments in the field in order to recognize unnecessary delays in completion of audits.
20%	Performs preliminary cursory review of audit reports and other work products submitted by auditors. Prepares correspondence and communicates with taxpayers on Sales and Use Tax matters and civil audit issues including fraud.
10%	Functions as audit selector. Coordinates annual selection and maintains systems throughout the year. Monitors audits selected to refine process.
10%	Participates in the hiring of new personnel; reviews training needs and provides input into the annual training plan for the section; trains new personnel and instructs others on current changes in the law; prepares employee probationary and annual performance appraisal reports and addresses personnel issues for the staff. Maintains an audits-in-process file for each auditor in the crew, maintains a monthly record of absences charged by auditor, reviews, and approves time reports, absence requests and expense claims.
5%	Acts on behalf of Principal Auditor, as delegated or in their absence. Holds office discussions and write up recommendations and reports.
5%	Prepares for and attends 10-day Office Discussions, Petition Hearings and Appeals Conferences; may be required to testify in court on tax fraud audit findings. Plans and conducts crew meetings; fill in for other supervisors in their absence.

	MARGINAL JOB FUNCTIONS
5%	Monitors, inputs, and retrieves information from CDTFA's network and information systems. Items may include verifying audit leads, audit selection, statute dates, upload/download of data, various reports and advance audit lifecycles.
5%	Manages special projects assigned by the Audit Principal or Administrator that may be sensitive or critical in nature. Performs other job-related duties as required.

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

Work Environment:

☒ May work in a high-rise building.

☐ Exposure to cannabis, nicotine, and other related products deemed potentially hazardous.

Physical Abilities:

☒ Ability to transport materials up to thirty (30) pounds, with or without reasonable accommodation.

☒ Remain in a stationary position for extended periods of time to meet operational needs and critical deadlines.

☒ Work long and irregular hours, both in and out of the office, in various locations.

Additional Requirements/Expectations:

☒ For in-state positions: Travel to and work at assigned field sites, up to 50% of the time, which may include evenings, weekends, and/or overnight travel in various locations statewide.

☒ For out-of-state positions: Travel to and work at assigned field sites, up to 50% of the time, which may include evenings, weekends, and/or overnight travel in various locations and states.

☒ The position may be called to testify in administrative hearing matters and criminal court proceedings.

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: 08/27/2025	**C&P Analyst Initials: DF**