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 II**	
DIVISION/OFFICE/UNIT		SPECIFIC LOCATION ASSIGNED TO	
FMD/FOB/Local Revenue Branch			
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 - 486 - 4277 -	

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 Business Taxes Administrator (BTA) III, the Supervising Tax Auditor (STA) II supervises team members performing the most difficult and highly specialized audit functions for the Local Revenue Branch (LRB). The STA II oversees through the technical supervisor and team members the processing of scheduled tax returns ensuring allocation and registration compliance within the tight unloading deadlines, and ensuring accurate and timely allocations, and billings. The STA II is responsible for reviewing the most complex scheduled sales and use tax returns and adjustments, questions, and fund transfer approvals above threshold limits. The STA II authorizes District Office investigations of local and district tax issues, providing field audit team members with direction and guidance in both LRB and field audit assignments. The STA II ensures timely allocation, funding, and payments to jurisdictions in the State of California. The STA II reviews legislation for team members resources to implement new legislation and oversees special projects, as required by legislation and/or board regulation. The STA II leads and coordinates programming efforts to modify and enhance mainframe return, EFT, fund allocation, and fund distribution systems to ensure the overall allocation and deallocation of the local and district taxes. The STA II may act as the BTA III in her/his absence.

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

PERCENTAGE OF TIME SPENT	DUTIES
55%	**ESSENTIAL JOB FUNCTIONS** **Return Processing, Billing, Review and Guidance** • Provides guidance to Business Taxes Specialists in the development of formulas and database applications that enable the projection of future revenues to base advances of local and district tax payments to over 600 local jurisdictions. Oversees allocations of local and district tax revenues to minimize over and under payments to jurisdictions while providing stable tax distributions and ensuring internal controls are followed to prevent unauthorized payments. • Reviews local and district tax estimates for new jurisdictions (and works with local jurisdiction representatives) to ensure revenue distribution are timely and accurate. • Establishes programs to notify local jurisdictions of mass refunds and reallocations impacting local taxes, providing notification, and offset (repayment programs) under authorized statutes. • Provides guidance to team members to enable the review and approval or rejection of local government. Resolutions authorizing jurisdictions and third parties access to confidential board records within prescribed limitations. Review and authorize action to discontinue access to confidential board records by third parties when the Resolution no longer meets the statutory requirements. • Directs the audit of local and district tax distributions and billings ensuring compliance with statutes, regulations, and allocation guidelines so that multi-location sales and use tax accounts are accurately& timely processed to ensure proper local government payments. • Establishes formulas for interrogating the database to identify allocation errors for investigation and assignment to LRB team members.

	• Reviews and approves the largest of local and district tax fund transfers and billings. Issues Go-Backs where work does not comply with guidelines or there is insufficient investigation. • Conducts the first level of the appeal process for local and district tax redistributions and initiates reinvestigations as to factual matters making recommendations to audit team members where warranted. Coordinates with local jurisdiction results of appeal investigation and recommends next level in process in unresolved cases. Furnishes copies of confidential documents authorized by statute when requested. • Responds to local jurisdiction inquiries providing copies of confidential file documentation as authorized by statute in support of reallocations performed to identify the factual basis as to the source of the adjustment, often to support whether payment should be made or denied to a consultant.
35%	**Develop and maintain staffing patterns required by new legislation, changes in board regulations, workload, or business requirements** • Conduct workload studies and develop levels of production to measure staffing needs and recommend staffing classifications needed. Review workload impact in response to new or enhanced services requested by local jurisdictions. • Implement new legislation and act as a consultant for programming team members and other units, where the legislation crosses unit boundaries to ensure compliance with statutory provisions. Provides training and procedural guidance for implementation of changes to existing programs which includes the preparation of procedural bulletins to direct unit personnel and coordinates between other units. • Interview and select audit employees for the unit as well as participate in interview panels for Tax Technician series and review matters relative to collective bargaining involving audit team members. Prepares examination questions when requested and sits on QAP panels as needed. • Direct the orientation and training of auditors that are new to the team members. Issue training bulletins on changes necessary to complete workload in an accurate and timely manner. • Represent unit at meetings of local officials, and at Board member sponsored seminars to provide information on the local tax program, upcoming design changes, and proposed changes to allocation procedures whether statutory, regulatory or policy.
5%	**Miscellaneous** • Prepare performance evaluations. • Prepare Budget Change Proposals (BCP) in response to workload growth or new legislation. • Conducts advanced training classes for audit team members and writes materials to aid in training team members on allocation and other related issues. • Coordinates as necessary processing and related activities with other sections or divisions of the Board, including, but not limited to, Return Analysis, Cashiers, Key Data Entry, Audit Review and Refund, and Technology Services. Act as a consultant on new and existing programming functionality to implement desired changes or make enhancements to the Board's system, providing design requirements that meet statutory and regulatory requirements.
5%	**MARGINAL JOB FUNCTIONS** Performs other job-related duties as needed, which may include Providing section supervisory coverage in conjunction with other supervisors within the section to allow employees flexibility in choosing work schedules.

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:

-

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: 10/23/2026	**C&P Analyst Initials: AC**