

California Department of Tax and Fee Administration

DUTY STATEMENT

☐ CURRENT
☐ PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION Supervising Tax Auditor II		WORKING TITLE Supervising Tax Auditor II	
DIVISION/OFFICE/UNIT PPDD/HOB/Refunds Section		SPECIFIC LOCATION ASSIGNED TO	
SEERA DESIGNATION Supervisory	BARGAINING UNIT S01	WORK WEEK GROUP E	CERTIFICATES REQUIRED None
FINGERPRINTS/BACKGROUND CHECK REQUIRED ☒ Yes ☐ No	BILINGUAL POSITION ☐ Yes ☒ No	SUPERVISION EXERCISED Yes	
INCUMBENT		POSITION NUMBER (Agency-Unit-Class-Serial) 291-461-4277-	
<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, the STA II supervises a group of auditors performing the most difficult and highly specialized audit and refund functions for the Refunds Section. Ensures that claims for refund are properly and accurately acknowledged, controlled, and processed. Approves on-line refunds under the applicable tax law and adjustments to account liabilities over established thresholds including refunds resulting from stipulated court judgements and cases evaluated and approved by the Department's Settlement Section. The STA II reviews and approves public record refunds summaries prepared for the Deputy Director's approval; reviews and approves recommendations on claims; and oversees and approves claims filed by vehicle manufacturers under the applicable law. The STA II will be actively involved in creating and sustaining a great culture, developing annual goals, and working with peers and management to achieve them. Candidate must be able to perform the following essential job functions with or without reasonable accommodation.			
PERCENTAGE OF TIME SPENT	DUTIES		
40%	<u>ESSENTIAL JOB FUNCTIONS</u> Plans, organizes, and directs the timely processing of claims for refund. Directly supervises audit team members to resolve questions and issues related to the various tax laws, regulations, audit procedures, and administrative policies. Provides guidance and timely feedback to team members to ensure timely completion of assigned tasks and duties.		
40%	Reviews and approves refunds and adjustments to accounts receivable over established thresholds and performs a cursory periodic random test of refunds processed for less than those thresholds; reviews and approves summaries for public record refunds; and reviews memoranda for approval by the Deputy Director for over established thresholds resulting from erroneous or duplicate electronic fund transfer payments. Reviews Decisions by the Department's Appeals Section resulting from claims for refund and ensures readit adjustments comply with the recommendation.		
10%	Develops and maintains staffing patterns consistent with workload requirements. Fills vacant positions timely by reviewing employment applications, conducting interviews, determining, and selecting the most qualified candidate; makes recommendations regarding promotions and other personnel actions; identifies training needs and provides input on the Annual Training Plan for the Section. Conducts monthly team meetings, weekly 1:1 meetings with team members, individual counseling, timely probationary reports, and annual performance appraisal summaries.		
10%	<u>MARGINAL JOB FUNCTIONS</u> Acts as interim section supervisor during the absence of the STA III. Performs other job-related duties and projects as required by management.		
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.			

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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>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.</i>		
PRINT EMPLOYEE NAME	EMPLOYEE'S SIGNATURE	DATE
<i>I certify that the above accurately represents the duties of the position and that I have reviewed these duties with the above-named employee.</i>		
PRINT SUPERVISOR NAME	SUPERVISOR'S SIGNATURE	DATE
HRB Approval Date: 10/21/2026	C&P Analyst Initials: ANS	