STATE OF CALIFORNIA
Franchise Tax Board

Proposed

HR Date: 10/20/2026

HR Initials: CB

Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
2627-00256	
Classification Title	**Position Number**
Tax Auditor	564-141-4362-990
Working Title	**Bureau and Section**
Auditor	Internal Audit/Political Reform Audit

Our mission is to help taxpayers file timely and accurate tax returns and pay the correct amount to fund services important to Californians. To support this mission, FTB employees strive to develop in CalHR's Core Competencies: Collaboration, Communication, Customer Engagement, Digital Fluency, Diversity and Inclusion, Innovative Mindset, Interpersonal Skills, and Resilience. Core competencies are the knowledge, skills, and behaviors which are foundational to all state employees regardless of classification.

General Statement

Under the close supervision of the Administrator I, Political Reform Audit Section, incumbent will learn all phases of the political reform audit work and conduct the least-to-moderately difficult field audits of books, statements, and records supporting the statements and reports of candidates and their controlled committees, and other committees filed under the Political Reform Act of 1974. Corresponds with filers and/or their representatives, determine compliance with the provisions of the Political Reform Act and related regulations and prepares audit reports for all completed cases.

Essential Functions

Percentage	Description
40%	Perform the preparation work for least-to-moderately difficult field audits of books and records supporting the statements and reports of candidates and committees. This includes electronically accessing Secretary of State or local filing offices for information, downloads, and copies of filed reports and statements. Prepare and populate schedule templates as well as creating schedules for facts unique to the case. Workpapers must be neat, properly crossed referenced and easily understandable by management and external enforcement agencies. You will determine sample selections for examination. Schedule field appointments for travel throughout the state which will include overnight travel.
40%	Conduct the field audit work that includes reviewing source documents sent electronically, paper copies physically maintained, and obtaining through third parties. Analyze and develop facts and evidence to form a technically sound conclusion supported by law, regulation, advice, and source documents. Prepare an Information, Facts, Law, Analysis and Conclusion (IFLAC) work paper to support determinations made. Correct and apply review direction from a team lead on subsequent completed work. Some workloads will require completion within statute. Cases should be submitted in a timely manner. Write audit reports using departmental standards released to the public for findings determined to be material.
10%	Verbally and in writing communicate with filers and/or their representatives including holding preliminary audit discussions and post audit conferences in person and by phone. Attend preliminary and post audit conferences as a team member for development and training and assisting on the more difficult audits.

Marginal Functions

Percentage	Description
10%	Provide assistance to the FPPC staff in the furtherance of purposes of the Political Reform Act. Assist team members on larger audits. Participate in group discussion and at staff meetings for discussion of audit issues, law and regulation changes. On an as needed basis, provide support duties with the least-to-moderately difficult tasks including obtaining audit case materials and preparing and releasing initial contact letters.

Signature Authorization

If I choose to sign this form electronically, I agree that my electronic signature is a legally binding equivalent to my handwritten signature on a paper form.

Employee: I confirm that I have read and understand the described duties and functions of this position.

Name (Print)	Signature	Date

Supervisor: I certify that the above information accurately represents the described duties and functions of this position.

Name (Print)	Signature	Date