California Department of Tax and Fee Administration

DUTY STATEMENT

☐ CURRENT
☐ PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION		WORKING TITLE	
Business Taxes Specialist II		**Business Taxes Specialist II**	
DIVISION/OFFICE/UNIT		SPECIFIC LOCATION ASSIGNED TO	
PPDD/HOB/Refunds Section			
SEERA DESIGNATION	BARGAINING UNIT	WORK WEEK GROUP	CERTIFICATES REQUIRED
Rank & File	**01**	**02**	**None**
FINGERPRINTS/BACKGROUND CHECK REQUIRED	BILINGUAL POSITION	SUPERVISION EXERCISED	
☒ Yes ☐ No	☐ Yes ☒ No	**Act as a lead**	
INCUMBENT		POSITION NUMBER *(Agency-Unit-Class-Serial)*	
		291-461-4379-	

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 supervision of a Supervising Tax Auditor (STA) III, the Business Taxes Specialist (BTS) II serves as the technical resource and operational expert for the Refunds Section (RS). The BTS II analyzes, evaluates, and monitors RS processes using existing and customized data sources, and provides reports, operational data, and recommendations to management and RS supervisors. The BTS II performs in-depth analysis and review of Decisions issued by the Appeals Bureau (Appeals) and coordinates action with field office management to file Requests for Reconsideration (RFR) on behalf of the Processing, Policy, and Data Division (PPDD), coordinates reaudit adjustments based on the Decisions, and responds to RFRs filed by taxpayers. Additional duties include performing or reviewing the most complex assignments, attending meetings with or for the STA III, and working on special projects.

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

PERCENTAGE OF TIME SPENT	DUTIES
	ESSENTIAL JOB FUNCTIONS
50%	Acts as a lead person and subject expert resource providing advice to team members and management on complex assignments, issues, policies, or procedures. Performs research on sensitive/complex cases, creates or reviews custom correspondence for the section supervisor or management signature. Analyzes and evaluates RS incoming claims for refund and identifies trends and other factors that may impact key metrics or goals. Utilizes management reports, system reports, and other data sources to document productivity and efficiency. Provides weekly, monthly, and fiscal yearly reports.
20%	Performs comprehensive analysis of Decisions and supplemental Decisions issued by Appeals, and coordinates action with field office management to file RFRs on behalf of PPDD, coordinates reaudit adjustments based on the Decisions, and responds to RFRs filed by the taxpayers. Reviews Decisions and supplemental Decisions issued by Appeals for significant factual errors, errors in applying established policies and procedures, and errors in applying the laws and regulations to the facts of the case, then recommends to management if a RFR should be filed by the PPDD. Coordinates with the field and other headquarters sections to implement Appeals' Decision.
20%	Reviews, analyzes, and approves summary analyses prepared by RS team members prior to referral to Appeals for conference. Assists RS supervisors in reviewing and approving public record summaries, medical claims refund Field Billing Orders, and return adjustments. This includes providing feedback and direction to other team members and requires utilizing knowledge and experience in complex areas of the applicable tax laws. Attends meetings on system issues, writes system change requests, tests, and troubleshoots ongoing system activities.
	MARGINAL JOB FUNCTIONS
10%	Performs special projects and 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: 11/2/2026	**C&P Analyst Initials: ANS**