California Department of Tax and Fee Administration

DUTY STATEMENT

☐ CURRENT
☐ PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION		WORKING TITLE	
Tax Auditor		**Tax Auditor**	
DIVISION/OFFICE/UNIT		SPECIFIC LOCATION ASSIGNED TO	
BTFD/ACB/ADAB/Appeals Section			
SEERA DESIGNATION	BARGAINING UNIT	WORK WEEK GROUP	CERTIFICATES REQUIRED
Rank & File	**01**	**2**	**None**
FINGERPRINTS/BACKGROUND CHECK REQUIRED	BILINGUAL POSITION	SUPERVISION EXERCISED	
☒ Yes ☐ No	☐ Yes ☒ No	**None**	
INCUMBENT		POSITION NUMBER *(Agency-Unit-Class-Serial)*	
		291-494-4267-	

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 close supervision of the Supervising Tax Auditor II (STA II), the Tax Auditor (TA) performs duties of the least to moderate difficulty. The incumbent will be responsible for appeals cases and a variation of duties in the area of appeals and communicating with taxpayers and their representatives. The incumbent will work in all special programs both independently and in small groups. The incumbent will utilize California Department of Tax and Fee Administration's (CDTFA) computer systems to complete tasks and duties required of the position.

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

PERCENTAGE OF TIME SPENT	DUTIES
	ESSENTIAL JOB FUNCTIONS
45%	Analyzes and takes appropriate steps in processing taxpayers' claims for refund and information received which may indicate taxpayer underpaid liabilities. This may be resolved by phone, correspondence or field visits and involve analysis of documentation in accordance with the law. Investigations may result in refund or determination of significant amount of tax. Assignments may include consideration of relief from penalty and/or interest cases.
45%	Reviews and evaluates petitions and administrative protests received from taxpayers and communicates with them to resolve special taxes appeals cases. Resolutions may involve referrals for additional field work as required, attending appeals conferences, and the preparation of re-audits or adjusted field billing orders. Assignments may include consideration of relief from penalty and/or interest cases.
5%	Provides advisory services to taxpayers on a statewide basis.
	MARGINAL JOB FUNCTIONS
5%	Performs 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 remain in a stationary position, consistent with office work, for extended periods of time.
- Ability to access and use a laptop, office equipment, and/or telephone system daily.

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: 6/19/2026	**C&P Analyst Initials: JVR**