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		**Technical Advisor**	
DIVISION/OFFICE/UNIT		SPECIFIC LOCATION ASSIGNED TO	
Field Operations Division/Administration		TBD	
SEERA DESIGNATION	BARGAINING UNIT	WORK WEEK GROUP	CERTIFICATES REQUIRED
Rank and File	**01**	**2**	**None**
FINGERPRINTS/BACKGROUND CHECK REQUIRED	BILINGUAL POSITION	SUPERVISION EXERCISED	
☒ Yes ☐ No	☐ Yes ☒ No	**May act as Lead**	
INCUMBENT		POSITION NUMBER *(Agency-Unit-Class-Serial)*	
		291- 440 **-4379-** XXX	

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 Assistant Deputy Director for Audit in the Field Operations Division (FOD), the Business Taxes Specialist II (Technical Advisor) serves as a highly skilled technical expert on audit policies, procedures, and information systems, including the Centralized Revenue Opportunity System (CROS). The incumbent evaluates the effectiveness of the audit program, identifies operational issues, recommends improvements, and assists in developing policies, procedures, training, and system enhancements. In addition to the core Technical Advisor duties, the BTS II provides analytical and technical support, which includes research, documentation, case summarization, and procedural guidance to ensure consistency and accuracy across FOD, to BTS III on appeals, petitioned audits, investigation case reviews, seizure packages, citations, and OTA hearing preparation. Travel may be required up to twenty-five (25%) of the time, including overnight.

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

PERCENTAGE OF TIME SPENT	DUTIES
60%	**ESSENTIAL JOB FUNCTIONS** Applies advanced knowledge of audit program policies, procedures, and CROS functionality to independently identify, evaluate, and recommend improvements to audit operations. Initiates, coordinates, and tests CROS system enhancements and corrections, and serves as the division's liaison with CROS project teams and field staff to ensure effective implementation and communication of system changes. Independently researches, analyzes, and resolves highly technical issues affecting the statewide audit program, and recommends policy or procedural modifications to improve consistency, accuracy, and effectiveness. Leads and participates in intra- and interdepartmental projects and collaborates with units such as Technical Advisors, Audit Information Section, Data Analysis Section, and the FOD Deputy Director's Office to support audit systems, policies, procedures, and statewide audit objectives. Coordinates field office projects and activities, providing guidance and consultation on audit processes, requirements, and best practices. Independently analyzes, organizes, tracks, and assesses audit program activities; researches and synthesizes complex data; and prepares, presents, and explains detailed analytical reports that support CDTFA and FOD goals and identify emerging trends impacting program metrics. Identifies, develops, and coordinates data queries and custom reporting tools to support planning, monitoring, and evaluation of division audit activities. Independently plans, coordinates, and leads meetings, workgroups, or focus groups involving auditors, reviewers, supervisors, principals, and administrators to gather input, address issues, and improve audit program outcomes. Assists in the review, analysis, and clearance of technical manuals, policy documents, and audit-related guidance to ensure accuracy and statewide consistency.

20%	Assists the BTS III in reviewing and analyzing petitioned cases, including audit workpapers, field billing orders, investigation reports, seizure packages, and citations. Independently prepares and presents case summaries, issue analyses, and supporting documentation for appeals conferences and hearings. Drafts preliminary responses for Petitions for Release of Property Seized under the Cigarette and Tobacco Products (CTP) Licensing Act. Independently conducts technical research on legal, regulatory, and procedural issues impacting appeals outcomes and provides findings and recommendations. Compiles, organizes, and maintains case files, briefing materials, and reference documents required for appeals processing. Identifies patterns, recurring issues, and trends in appeals and petitions, and prepares summarized findings for management to support statewide audit program improvements.
15%	Independently reviews and evaluates high-level Taxpayers' Rights Advocate (TRA) inquiries and upper-management requests, coordinating with field staff and program areas to resolve complex taxpayer concerns. Identifies potentially controversial, novel, or precedent-setting audit or legal issues; evaluates their implications for statewide audit policy and consults with management and CDTFA Legal for guidance and interpretation. Provides subject matter expertise to management on emerging technical, legal, or procedural issues that may affect statewide audit practices or program consistency. Analyzes sensitive or high-visibility matters involving taxpayer complaints, field audit practices, or statutory interpretation, and prepares clear, concise summaries and recommendations to support management decision-making. Represents division management at meetings, workgroups, and inter-unit discussions to communicate audit program priorities, clarify policies, and address technical concerns. Monitors and evaluates trends arising from escalated inquiries, TRA cases, and Legal consultations, and advises management on potential program risks, training needs, or necessary policy updates.
	MARGINAL JOB FUNCTIONS
5%	Performs other job-related duties to cover the workload to meet operational needs.

WORK ENVIRONMENT OR PHYSICAL ABILITIES REQUIRED FOR THE JOB *(checked if applicable)*:

Work Environment:

- May work in a high-rise building
- Standard office environment
- Parking varies by location

Physical Abilities:

- Remain in a stationary position for extended periods of time to meet operational needs and critical deadlines.
- Use a computer/laptop, office equipment, and telephone daily.
- Ability to transfer and transport materials, supplies, and equipment weighing up to thirty (30) pounds with or without reasonable accommodation.

Additional Requirements/Expectations:

- Travel may be required to meet training requirements, which may include overnight.
- Must be flexible and willing to adjust to changing work schedules, if required, for operational needs.

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: 04/15/2026	**C&P Analyst Initials: DF**