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 III		**Technical Advisor for Field Operations**	
DIVISION/OFFICE/UNIT		SPECIFIC LOCATION ASSIGNED TO	
Field Operations Division / Administration		**Statewide**	
SEERA DESIGNATION	BARGAINING UNIT	WORK WEEK GROUP	CERTIFICATES REQUIRED
Rank and File	**01**	**E**	**None**
FINGERPRINTS/BACKGROUND CHECK REQUIRED	BILINGUAL POSITION	SUPERVISION EXERCISED	
☒ Yes ☐ No	☐ Yes ☒ No	**Acts as a Lead**	
INCUMBENT		POSITION NUMBER *(Agency-Unit-Class-Serial)*	
		291-440-4378-002	

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, the Technical Advisor acts as the highest level specialist and technical resource to departmental management and legal staff on matters concerning the largest and most difficult taxpayers and those of the most sensitive and complex nature regarding audit and other related tax issues. The Technical Advisor conducts in-depth research, provides expert consultation and advice, and prepares written reports to executive management in the recommendation of audit policies and procedures for handling unprecedented tax issues. The Technical Advisor serves as the liaison for the Assistant Deputy Director and works directly with elected officials, the Director's office, or other program managers regarding taxpayer inquires, complaints, and allegations relating to audit activities or issues, such as employee misconduct, illegal or unjustified audit practices, security, and requests for the abatement of penalties or interest. The Technical Advisor acts as the highest-level tax program advisor (lead) in conducting in-depth research and investigation into the taxpayer's account and the actions taken by CDTFA staff. The Technical Advisor will work closely with field office management and headquarters staff to facilitate and develop a resolution to the inquiry, complaint or allegation. The Technical Advisor will negotiate with taxpayers or their representatives on issues involving audits or audit practices. In cases involving allegations of discrimination or harassment, the Technical Advisor works closely with the Diversity and Inclusion Office and the Internal Affairs Section to ensure taxpayers are treated fairly and the laws and regulations are applied uniformly and consistently statewide. The Technical Advisor works toward facilitating a better communication and eliminating potential misunderstanding between the taxpayer, Legislator's offices and executive management. The Technical Advisor prepares written correspondence on the recommended resolution and provides such communication to the respective taxpayer, Legislator, and executive manager. The Technical Advisor for Field Operations provides guidance and assistance to the field offices throughout the state. The Technical Advisor provides consultation and advice on tax programs and administrative issues relative to the operations of field offices; develops and makes recommendations on sales and use tax policies and procedures, and reviews and evaluates program effectiveness and operational efficiency. The Technical Advisor assists in the development and implementation of strategies for effective and efficient administration of the sales and use tax program and coordinates field operation projects and activities with other intradepartmental and interdepartmental functions. Travel is required of this position up to twenty-five (25%) percent of the time.

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

PERCENTAGE OF TIME SPENT	DUTIES
40%	**ESSENTIAL JOB FUNCTIONS** Serves as the highest level technical resource to departmental management on matters concerning audit, tax, or fee policy issues. Personally, conducts in-depth research, analysis, evaluation, and presentation of unique legal issues, unprecedented tax issues, highly complex audit and administrative issues, as well as extremely sensitive tax or technical issues as requested by the Deputy Director or Assistant Deputy Director of Field Operations to Executive Management.

	Briefs the Assistant Deputy Director on emerging issues within the Department or public sector that may affect tax or fee program areas. Independently identifies emerging issues and recommends appropriate action. Provides expert consultation, assistance, and evaluation in the development of policy and procedures for handling unprecedented tax or fee issues, politically sensitive administrative investigations and the implementation of legislation affecting tax or fee programs within the Field Operations Division.
	Provides advice and consultation in formulating statewide operating and administrative policies and procedures for field operations and reviews and makes recommendations on budgetary, personnel, and other matters relative to coordinating the management of field operations, including organizational changes, workload determinations and staffing requirements, and training. Develops and makes recommendations on sales and use tax policies and procedures to improve program effectiveness and operational efficiency, assists in developing and implementing strategies for effective and efficient administration of the Sales and Use Tax Program, provides guidance and assistance to the field offices, Serves as the liaison for Field Operations in coordinating activities among intradepartmental and interdepartmental management and their staff, taxpayer and industry groups.
25%	Serves as liaison for the Assistant Deputy Director of Field Operations and works directly with elected officials, the Director's office, the Deputy Director, or other program managers regarding taxpayer inquires, complaints, and allegations relating to audit activities or issues, such as employee misconduct, illegal or inappropriate audit activities, security, and requests for the abatement of penalties or interest. Acts as the highest level tax program advisor (lead) in conducting in-depth research and investigation into the taxpayer's account and the actions taken by CDTFA staff. Works with field office management and headquarters staff to facilitate and develop a resolution to the inquiry, complaint or allegation. Proposes departmental audit policy changes based on findings of the investigation. Works closely with the Taxpayer Rights Advocate and the Internal Affairs Section to ensure taxpayers are treated fairly and the laws and regulations are applied uniformly and consistently by staff statewide. Prepares the written correspondence (response) on the recommended resolution to the taxpayer and to the elected officials, and executive management.
10%	Performs the final management review of all technical manuals and policy documents issued by the division. Reviews, evaluates and edits all policy and directive memorandums, publications, notices and reports for consistency with existing policy, administrative trends and legislation. Creates issue papers and Operational Memos on topics affecting the Field Operations Division with specific emphasis on topics affecting audit policies and procedures.
10%	Performs the review, analysis, and investigation into the responses received from taxpayers to the customer service surveys, such as the How Are We Doing (audit survey). Prepares correspondence and conducts discussion with field office management regarding the appropriate action to be taken based on the investigation into the survey responses.
5%	Represents and advocates the Department's position on matters related to the Field Operations Division to elected officials.
	MARGINAL JOB FUNCTIONS
5%	Acts independently or part of a project team to prepare or coordinate the preparation of reports on a variety of technical, budgetary, and executive management requested subjects. Provides technical data for the preparation of the reports and reviews the Field Operations Division's report for budgetary hearings, such as with the Department of Finance; Legislature, and other control agency inquires.
5%	Coordinates the preparation of suggested responses to the more complex audit questions raised by other states, the Multistate Tax Commission and other groups or associations, and taxpayers, for executive management, and other elected officials. Coordinates staff activity with respect to interagency projects, assists and/or represents the Assistant Deputy Director Field Operations on committees or joint efforts with multi-governmental agencies to explore opportunities for improved interagency coordination, process simplification, and better communication between the State and business taxpayers, and performs other duties of a highly technical and politically sensitive nature.

	Follows up on internal audits of field operations and audits by other outside agencies to ensure compliance with recommendations. Reviews the results, addresses issues, and recommends corrective action in response to findings from internal audits, compliance evaluations, and other examinations by control agencies relative to field operations. Acts for the Assistant Deputy Director of Field Operations as directed and represents him/her in meetings, hearings, and conferences. Performs other job-related duties as required.

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

Work Environment:

- May work in a high-rise building

Physical Abilities:

- Ability to access and use a personal computer, office equipment, and/or telephone daily

Additional Requirements/Expectations:

- Travel to work away from the office to other office locations throughout California and other states up to twenty-five (25%) 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: 12/18/2020	**C&P Analyst Initials: AB**