

California Department of Tax and Fee Administration DUTY STATEMENT

CURRENT
 PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION Tax Auditor		WORKING TITLE Tax Auditor	
DIVISION/OFFICE/UNIT FOD / Out-of-State /		SPECIFIC LOCATION ASSIGNED TO	
SEERA DESIGNATION Rank and File	BARGAINING UNIT 01	WORK WEEK GROUP 2	CERTIFICATES REQUIRED None
FINGERPRINTS/BACKGROUND CHECK REQUIRED <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	BILINGUAL POSITION <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	SUPERVISION EXERCISED None	
INCUMBENT	POSITION NUMBER (Agency-Unit-Class-Serial) 291- -4267-		
<i>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.</i>			
<p>POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS</p> <p>Under close supervision of the Supervising Tax Auditor, the Tax Auditor (TA) conducts the least to moderately difficult field audits. The TA audits accounts, attends basic tax law and audit training classes, makes audit appointments, meets with taxpayers and their representatives, explains the audit findings, and prepares appropriate audit reports and written correspondence to taxpayers. Travel required at least 50% of the time, out-of-state, which includes overnight travel.</p> <p>This position is designated as "Mobile Worker" per California Department of Tax and Fee Administration (CDTFA) Telework Policy and Guidelines.</p> <p>Candidate must be able to perform the following essential job functions with or without reasonable accommodation.</p>			
PERCENTAGE OF TIME SPENT	DUTIES		
75%	<p><u>ESSENTIAL JOB FUNCTIONS</u></p> <p>Makes preliminary preparations such as reviewing the prior audit and the taxpayer's file, makes the audit appointment, and reviews the laws, regulations and rulings pertinent to the assignment. The TA also develops the audit program and determines the appropriate audit procedures to be performed and the scope of testing.</p> <p>Performs audit procedures such as observing the taxpayer's operations, examines the books and records, conducts specialized tests and sampling of transcripts, examines supporting detail, and prepares schedules and verification comments.</p> <p>Promptly informs the taxpayer of the need for any additional support, explains what the deficiencies are, and the type of support needed, establishes deadlines for obtaining the data, and examines the supporting documentation obtained.</p> <p>Explains the audit findings to the taxpayer and their representatives, provides copies of the audit work papers, explains the application of the law and the audit procedures used, and prepares a report of discussion when appropriate.</p>		
10%	<p>Attends training classes in Sales and Use Tax Law and auditing procedures relative to tax auditing. Prepares weekly and monthly time sheets accounting for all assignments and work performed, audit status reports for all work in process, a variety of forms to process work, and other reports designated by management.</p>		
5%	<p>Monitors, inputs, and retrieves information from CDTFA network and information systems. Items may include audit leads, data upload/download, statute dates, resale verification, and the backup of audit work papers.</p>		
5%	<p>Attends supervisors' and appeals conferences involving non-concurred audits and participates in other general training classes.</p>		
5%	<p><u>MARGINAL JOB FUNCTIONS</u></p> <p>Performs other job-related duties, supporting the audit program activities as required.</p>		

291- -4267-**WORK ENVIRONMENT OR PHYSICAL ABILITIES REQUIRED FOR THE JOB** *(if applicable):***Work Environment:**

- May work in a high-rise building

Physical Abilities:

- Ability to transport materials weighing up to thirty (30) pounds, with or without reasonable accommodations
- Work long irregular hours, both in and out of the office in various locations and states
- Ability to access and use a personal computer, office equipment, and other electronic devices

Additional Requirements/Expectations:

- Travel, which may include overnight
- Travel to complete training requirements, which may include overnight

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: 9/29/2020**C&P Analyst Initials: JF**