

# DUTY STATEMENT

SCHEDULE TO BE WORKED/WORKING HOURS <b>Monday - Friday --</b>		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION <b>Business Taxes Specialist I</b>		WORKING TITLE <b>Business Taxes Specialist</b>	
DEPARTMENT/DIVISION/DISTRICT/UNIT <b>Special Taxes and Fees, Audit Examination Branch, 492</b>		SPECIFIC LOCATION ASSIGNED TO <b>Headquarters</b>	
SEERA DESIGNATION <b>Rand and File</b>	BARGAINING UNIT <b>01</b>	WORK WEEK GROUP <b>2</b>	CERTIFICATES REQUIRED <b>None</b>
FINGERPRINTS REQUIRED <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	BILINGUAL POSITION <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	SUPERVISION EXERCISED <b>May act as lead</b>	
INCUMBENT		POSITION NUMBER (Agency-Unit-Class-Serial) <b>290-492-4380-029</b>	

*The mission of the State Board of Equalization is to serve the public through fair, effective and efficient tax administration.*

**POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS**

Under the general supervision of a Supervising Tax Auditor II in the Audit Examination Branch, the Business Taxes Specialist (BTS) I performs the most difficult audits or audit functions and assignments; which includes performing the most complex field audits. The BTS I reviews audit working papers and field billing orders, acts as a lead auditor for field and desk audit staff, and trains auditors. This position may be required to travel up to 50% of the time, both in-state and out-of-state, including overnight travel.

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

PERCENTAGE OF TIME SPENT	DUTIES
70%	<p><b><u>ESSENTIAL JOB FUNCTIONS</u></b></p> <p>Perform complex field and desk audits of the largest companies. Review audit working papers and field billing orders prepared by auditors in the Audit Examination Branch. Act as the lead auditor for field and desk audit staff.</p>
20%	<p>Resolve issues that may require phone calls or correspondence with taxpayers, Board members, or other BOE staff. Issue resolution may involve analyzing or developing documentation, reports, tax law, legislation, or referrals to outside agencies.</p> <p>Use third party information and investigative and verification techniques to determine whether the correct amount of tax/fee was reported and paid. Compare various sources of data for audit selection purposes.</p> <p>Provide reports for internal and external use, as well as advisory services to taxpayers and BOE staff on a statewide basis.</p>
5%	<p><b><u>MARGINAL JOB FUNCTIONS</u></b></p> <p>Provide input on or prepare draft regulations, operations memos, notices to taxpayers, and other guidelines.</p> <p>As lead person, train auditors on audit techniques and working paper preparation for programs administered by the Special Taxes Audit and Carrier Division.</p>
5%	<p>Other job related duties as required; may fill in for the supervisor during the supervisor's absence.</p>

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

**290-492-4380-029**

## Work Environment:

- Position is located in a High Rise Building

## Physical Abilities:

- Transport a laptop and peripheral equipment to an alternate worksite (approximately 20 lbs.).

## Additional Requirements/Expectations:

- In-state and out-of-state travel may be required up to 50% 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 EMPLOYEE NAME

EMPLOYEE'S SIGNATURE

DATE

HRD Approval date: 11/23/2015

C&amp;P Analyst Initials: ADL