

DUTY STATEMENT

SCHEDULE TO BE WORKED/WORKING HOURS Monday through Friday 8:00 am - 5:00 pm		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION Tax Auditor (BOE)		WORKING TITLE Property Auditor Appraiser, Unitary Valuation and Audit Section	
DEPARTMENT/DIVISION/DISTRICT/UNIT State-Assessed Properties Division		SPECIFIC LOCATION ASSIGNED TO Sacramento	
SEERA DESIGNATION Rank and File	BARGAINING UNIT 01	WORK WEEK GROUP 02	CERTIFICATES REQUIRED Property Tax Appraiser
FINGERPRINTS REQUIRED <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	BILINGUAL POSITION <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	SUPERVISION EXERCISED None	
INCUMBENT		POSITION NUMBER (Agency-Unit-Class-Serial) 290-312-4267-018	

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 close supervision of a Business Tax Administrator II, the Tax Auditor in the Unitary Valuation and Audit Section assists on audits and audits the records of state assessees to ensure compliance with reporting instructions; prepares unitary value indicators and value recommendations to be submitted to the Board; assists on a variety of financial analyses and studies relating to the valuation and assessment of state-assessed property. The Tax Auditor performs one or more of the tasks relating to oversight and advisory functions on a rotational basis based on the division's operational needs. Travel throughout the state up to 50 percent of the time by automobile and airplane.

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

PERCENTAGE OF TIME SPENT	DUTIES
55%	<u>ESSENTIAL JOB FUNCTIONS</u> Under the guidance and leadership of the Senior Specialist Property Auditor Appraiser, the Tax Auditor will conduct the least-to-moderately difficult audits of accounting books and records of fixed assets of state assessees. As a team member, assists on the more complex audits of financial records and fixed assets of state assessees. This position may require up to 50 percent travel.
30%	Conducts the least complex appraisals related to smaller sized companies' financial information of one or more industry groups such as Energy, Transportation, Local Telephone, Wireless, etc. Processes detailed financial data into appropriate value indicators and correlates the value indicators into a value recommendation to be submitted to the Board. Assists in the appraisal of the more complex state-assessed properties.
10%	Assists in the research and preparation of written and verbal reports on special topics affecting valuations in utility appraisal work, such as obsolescence, service lives, possessory interests, court interpretations, legislation, etc. May appear at Board hearings regarding unitary valuations. Assists with developing and updating department desk procedures and internal policies. Prepares written communications of BOE policy or department advisory opinion in several formats.
5%	<u>MARGINAL JOB FUNCTIONS</u> As necessary, performs other appraisal or audit duties to cover the workload.

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

Work Environment:

- Communicate effectively, both orally and in writing.
- Create and maintain cooperative working relationships.

Physical Abilities:

- Evaluate data and draw sound conclusions.
- Analyze and evaluate routine appraisal or audit situations accurately and take effective action.
- Prepare clear, complete, and concise reports.
- Plan and organize workload, and set priorities.
- Work under pressure and meet deadlines.
- Flexibility and willingness to adjust to changing assignments and priorities.
- Operate a variety of office equipment (e.g., personal computer, fax machine, calculator, scanner, and copier).
- Utilize Microsoft Office applications (e.g., Outlook, Word, Excel, and PowerPoint).
- Proficiency in using a personal computer, including various software packages such as word processing, spreadsheets, and relational database programs for report writing and data analysis.
- Remain in a stationary position for extended periods of time

Additional Requirements/Expectations:

- Knowledge of California property tax laws; rules and regulations administered by the Board of Equalization (BOE); and related legal opinions and court decisions.
- Basic appraisal principles and standards.
- Audit techniques and procedures; basic accounting principles used in appraisal.
- Organization and functions of the BOE and Property Tax Department.
- Experience in property assessment procedures utilized in county assessors' offices.
- Attain a BOE appraiser certification within one year after qualifying for the certification examination.
- Travel throughout the state up to 50 percent of the time by automobile and airplane.
- Possess a valid California driver's license.

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
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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
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HRD Approval Date:	C&P Analyst Initials:
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