



Office of Tax Appeals

DUTY STATEMENT

☐ CURRENT
☒ PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS Monday – Friday 8:00AM – 4:30PM			EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION Senior Legal Typist			WORKING TITLE Senior Legal Typist	
DIVISION/OFFICE/UNIT Foundations Division			SPECIFIC LOCATION ASSIGNED TO 400 R Street, Sacramento, CA 95811	
CBID R04	DESIGNATED COI ☐ Yes ☒ No	PROBATION PERIOD 12 MONTHS	WORK WEEK GROUP 2	CERTIFICATES REQUIRED Typing (45 WPM)
FINGERPRINTS REQUIRED ☐ Yes ☒ No		BILINGUAL POSITION ☐ Yes ☒ No	SUPERVISION EXERCISED None	
INCUMBENT VACANT			POSITION NUMBER (Agency-Unit Class Serial) 292-502-3224-xxx	
The mission of the Office of Tax Appeals is to provide a fair, objective and timely process for appeals from California taxpayers.				
POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS				
Under the general supervision of the Staff Services Manager II in the Foundations Division, the Senior Legal Typist is responsible for legal administrative duties for four or more attorneys. The Foundation Division is responsible for all legal and administrative support for the agency's Administrative Law Judges. The incumbent performs legal typing and clerical work that may involve performing related office work required in preparing and processing a variety of legal documents The duties of the senior legal typist include, but are not limited to, the following: 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: Handles clerical procedures concerning activities under the supervision of the Staff Services Manager II, Administrative Law Judges, and Tax Counsels. Prioritizes and processes incoming and outgoing correspondence and legal documents in accordance with established procedures, legal requirements and timeframes. Performs redaction activities in accordance with established procedures.			
30%	Types, edits, revises, reformats and proofreads a variety of legal correspondence, petitions, legal brief documents, pleadings and legal opinions in accordance with legal requirements, timeframes, established procedures and office standards. Reviews and verifies the accuracy of case citations, quotations and other authorities against the original source document.			
15%	Maintains legal, confidential, discovery, and administrative files for Tax Counsels' files for opening and closing cases and any accompanying correspondence. Maintains case related information in the Case Management System, including uploading documents, updating the parties' information, entering the dates legal documents are filed in court and closing case files in compliance with Department procedures.			
10%	Screens incoming correspondence related to Tax Counsels' case files and established follow-up dates to ensure deadlines are met. Screens a variety of visitors and incoming phone calls and makes appropriate referrals.			
5%	MARGINAL JOB FUNCTIONS: May assist in the training of new Senior Legal Typists and may be asked to create and provide training to staff. Act as liaison with court clerks, process servers and court reporters. Other duties as assigned by supervisor within the skills and knowledge of a Senior Legal Typist classification.			

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

The following is template language, but additional information may be added if necessary for the job. List environmental conditions of the job or work hazards.

- The workstation is equipped with standard or ergonomic office equipment, as appropriate.
- Travel may be required to attend meetings or training classes.

Physical Abilities:

The following is template language, but additional information may be added if necessary for the job. List physical requirements for the position.

- Requires daily use of a personal computer and related software applications at a workstation.
- Requires ability to complete tasks that require making repetitive hand movements in the performance of daily duties.
- Requires prolonged sitting and or standing at a workstation for 6.5 to 7 hours per day.
- Requires dependability and excellent attendance records.

Additional Requirements/Expectations:

List any additional requirements/expectations for the position in this section.

- Must maintain regular and acceptable attendance at such level as is determined at the Department's sole discretion.
- Must be regularly available and willing to work the hours the Department determines are necessary or desirable to meet its business needs.
- Must be able to shift priorities and objectively handle assignments that may change throughout the day.
- Must be able to effectively carry out assigned with minimal supervision, be able to work independently or in a team environment, have strong communication skills and work well under pressure when meeting short deadlines.

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

HRO Approval Date:

C&P Analyst Initials: