



## Duty Statement

Request for Personnel Action (RPA) Number 2324-02072	Effective Date
Classification Title Legal Secretary	Position Number 564-410-1282-XXX
Working Title Legal Support Secretary	Bureau and Section Technical Resources Bureau, Legal Administrative Support Team

Our mission is to help taxpayers file timely and accurate tax returns and pay the correct amount to fund services important to Californians. To support this mission, FTB employees strive to develop in CalHR's Core Competencies: Collaboration, Communication, Customer Engagement, Digital Fluency, Diversity and Inclusion, Innovative Mindset, Interpersonal Skills, and Resilience. Core competencies are the knowledge, skills, and behaviors which are foundational to all state employees regardless of classification.

### General Statement

Under general supervision of the Administrator I, the Legal Support Secretary-Legal Secretary (LS) performs the full range of the most complex legal secretarial tasks and complex clerical work. with minimum instructions. The LS is assigned to two or more senior level attorneys and professional staff; to process a variety of legal correspondence, and various legal notices and forms. The LS provides secretarial support for the resolution of tax disputes and the Legal Division's general business processes.

### Essential Functions

Percentage	Description
45%	Proactively work with assigned attorneys and specialists in the preparing and processing of legal appeal briefs and other correspondences. Format, proofread, correct spelling, grammar and punctuation, make necessary corrections and recommend edits to attorneys and specialist. Scan and redact confidential or sensitive information in exhibits. Package briefs and other correspondence in accordance with established Legal Division procedures and the California Style Manual. Submit completed briefs to the Office of Tax Appeals (OTA) timely, using the Secure Web Internet File Transfer (SWIFT) and mailed copies to the appropriate taxpayer or representative. Work independently from general directions, while paying attention to details.
30%	Prepare docketed protest, settlement letters and other legal correspondences, from handwritten and typed copy. Format, proofread, correct spelling, grammar and punctuation, make necessary corrections and recommend edits. Format, copy, scan, email and mail related correspondences; upload correspondences and make updates to the case management system PASS. Provides customer service while performing secretarial, clerical, or research activities. Retrieve and provide monthly time reports for assigned staff, to ensure accurate divisional reporting of time in Timeportal.
10%	Schedule protest hearings, settlement conferences and Interested Parties Meetings (IPM) when requested. This includes registering visitors, reserving the conference room and necessary equipment and arranging for conference calls.
10%	Functions as the Division's pay master and answer telephone calls for general and Legal Division assistance. Provide back-up assistance to other secretaries or support functions; such as preparing and submitting travel reimbursements to CalAters for assigned attorneys and specialists.

## Marginal Functions

Percentage	Description
5%	Perform other administrative secretarial duties as directed.

### Signature Authorization

If I choose to sign this form electronically, I agree that my electronic signature is a legally binding equivalent to my handwritten signature on a paper form.

**Employee:** I confirm that I have read and understand the described duties and functions of this position.

\_\_\_\_\_  
Name (Print)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

**Supervisor:** I certify that the above information accurately represents the described duties and functions of this position.

\_\_\_\_\_  
Name (Print)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date



## Duty Statement

Request for Personnel Action (RPA) Number <b>2324-02072</b>	Effective Date
Classification Title <b>Senior Legal Typist</b>	Position Number <b>564-410-3224-xxx</b>
Working Title <b>Legal Support Secretary</b>	Bureau and Section <b>Technical Resources Bureau, Legal Administrative Support Team</b>

Our mission is to help taxpayers file timely and accurate tax returns and pay the correct amount to fund services important to Californians. To support this mission, FTB employees strive to develop in CalHR's Core Competencies: Collaboration, Communication, Customer Engagement, Digital Fluency, Diversity and Inclusion, Innovative Mindset, Interpersonal Skills, and Resilience. Core competencies are the knowledge, skills, and behaviors which are foundational to all state employees regardless of classification.

### General Statement

Under general supervision of the Administrator I, the Legal Support Secretary-Senior Legal Typist (SLT) performs the less complex legal secretarial and difficult clerical work. The SLT is assigned to one or more attorneys and specialists; to process a variety of legal correspondence, and various legal notices and forms. The SLT provides secretarial support for the resolution of tax disputes and the Legal Division's general business processes.

### Essential Functions

Percentage	Description
45%	Work with assigned attorneys and specialists in the preparing and processing of legal appeal briefs and other correspondences. Format, proofread, correct spelling, grammar and punctuation, make necessary corrections and recommend edits to attorneys and specialist. Scan and redact confidential or sensitive information in exhibits. Package briefs and other correspondence in accordance with established Legal Division procedures and the California Style Manual. Submit completed briefs to the Office of Tax Appeals (OTA) timely, using the Secure Web Internet File Transfer (SWIFT) and mailed copies to the appropriate taxpayer or representative. Work independently from general directions, while paying attention to details.
30%	Prepare docketed protest, settlement letters and other legal correspondences, from handwritten and typed copy. Format, proofread, correct spelling, grammar and punctuation, make necessary corrections and recommend edits. Format, copy, scan, email and mail related correspondences; upload correspondences and make updates to the case management system PASS. Provides customer service while performing secretarial, clerical, or research activities. Retrieve and provide monthly time reports for assigned staff, to ensure accurate divisional reporting of time in Timeportal.
10%	Schedule protest hearings, settlement conferences and Interested Parties Meetings (IPM) when requested. This includes registering visitors, reserving the conference room and necessary equipment and arranging for conference calls.
10%	Functions as the Division's pay master and answer telephone calls for general and Legal Division assistance. Provide back-up assistance to other secretaries or support functions; such as preparing and submitting travel reimbursements to CalAters for assigned attorneys and specialists.

## Marginal Functions

Percentage	Description
5%	Perform other administrative secretarial duties as directed.

### Signature Authorization

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**Employee:** I confirm that I have read and understand the described duties and functions of this position.

\_\_\_\_\_  
Name (Print)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

**Supervisor:** I certify that the above information accurately represents the described duties and functions of this position.

\_\_\_\_\_  
Name (Print)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date