



Office of Tax Appeals

DUTY STATEMENT

☐ CURRENT
☒ PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS Monday – Friday/8:30AM – 5:00PM			EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION Information Technology Specialist I			WORKING TITLE Salesforce Developer	
DIVISION/OFFICE/UNIT Administration Division			SPECIFIC LOCATION ASSIGNED TO 400 R Street, Sacramento, CA 95811	
CBID R01	DESIGNATED COI ☐ Yes ☒ No	PROBATION PERIOD 12 MONTHS	WORK WEEK GROUP 2	CERTIFICATES REQUIRED None
FINGERPRINTS REQUIRED ☐ Yes ☒ No		BILINGUAL POSITION ☐ Yes ☒ No	SUPERVISION EXERCISED None	
INCUMBENT VACANT			POSITION NUMBER (Agency-Unit Class Serial) 292-200-1402-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 direction of the Information Technology Manager I (IT Manager I), the Information Technology Specialist I (ITS I) serves as a well-versed Salesforce developer tasked with analyzing the Office of Tax Appeals (OTA) case management processes, ensuring the Salesforce workflows are meeting the customers business needs, and providing custom solutions when those business needs are not met. This position also serves as back-up for our Servicedesk Support and Salesforce Administrator as needed. Candidate must be able to perform the following essential job functions with or without reasonable accommodation.				
PERCENTAGE OF TIME SPENT		DUTIES		
45%		The duties of this position will include, but will not be limited to the following: Salesforce Developer Analyzes the as-is case management processes and Salesforce workflows to ensure customer business needs are being met, consults with customers to determine if business processes are current, provides custom solutions to Salesforce to meet the business requirements. Assists in facilitating customer workshops to provide functional analysis and feasibility options, ensures appropriate stakeholders are part of discussions that involves development from testing to maintenance, creates various timelines noting development goals, documents solutions and any updated workflows, tests and troubleshoots solutions, and addresses any bugs or glitches in the system.		
30%		Works in concert with OTA's Salesforce Administrator, in training end users on Salesforce on how to efficiently manage tasks, maintaining user roles, monitoring Salesforce updates, and consulting with customer on a regular basis to understand their requirements to generate prompt solutions.		
20%		Servicedesk Support Provides prompt, professional, and courtesy customer service to all end users; this includes but is not limited to; analyzing, interpreting, and responding to user inquiries and problems, troubleshooting, documenting solutions, and partnering with other staff in the Information Technology Unit as needed to resolve IT issues.		

5%

Assist users with various equipment; such as but not limited to, laptops, scanners, projectors, telecommunication devices.
Assist IT Associates, as needed, with the most complex servicedesk tasks and provide training as appropriate.

Marginal

Serves as back-up to the Salesforce Administrator.

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

- The duties of this position are performed indoors and is equipped with standard or ergonomic office equipment, as appropriate. Travel may be required to support remote locations, attend meetings or training classes.
- May be allowed to participate in OTA's Telework Program.

Physical Abilities:

- Ability to operate a computer with a keyboard and other office equipment, such as a telephone, copier and fax machine.
- Ability to lift up to 35 lbs., with or without assistance.

Additional Requirements/Expectations:

- Willingness to adhere to OTA's Code of Conduct.
- Requires the ability to work under pressure to meet deadlines.
- Must have strong communication skills, both orally and written.
- Be able to work independently as well as in a team environment.
- Maintain normal and consistent work hours, averaging 40 hours per week. Work weeks exceeding 40 hours per week, including travel to OTA satellite offices, is expected when necessary to complete assignments in a timely manner.
- Exercise a high degree of initiative, independence of action, and originality.
- Demonstrate tact and a high degree of good independent judgment; communicate effectively.
- Must maintain regular and acceptable attendance at such level as is determined at OTA's sole discretion.
- Must be regularly available and willing to work the hours OTA determines are necessary or desirable to meet its business needs.
- Must be able to organize and prioritize under deadline situations.
- This position may require state-wide travel via airplane and automobile up to 10% 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 SUPERVISOR NAME

SUPERVISOR'S SIGNATURE

DATE

HRO Approval Date:

C&P Analyst Initials: