



OFFICE OF TAX APPEALS

OBJECTIVE. TRANSPARENT. ACCOUNTABLE.

☐ CURRENT
☒ PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS Monday – Friday/8:00AM – 4:30PM			EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION Office Technician (Typing)			WORKING TITLE Office Technician (Typing)	
DIVISION/OFFICE/UNIT Case Management Division			SPECIFIC LOCATION ASSIGNED TO 400 R Street, Sacramento, CA 95811	
CBID R04	DESIGNATED COI ☐ Yes ☒ No	PROBATION PERIOD N/A	WORK WEEK GROUP 2	CERTIFICATES REQUIRED None
FINGERPRINTS REQUIRED ☐ Yes ☒ No		BILINGUAL POSITION ☐ Yes ☒ No	SUPERVISION EXERCISED None	
INCUMBENT			POSITION NUMBER (Agency-Unit Class Serial) 292-400-1139-002	
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 Staff Services Manager I, the Office Technician (Typing) in the Business Tax Appeals & Hearings Support Section of the Case Management Division, performs a wide range of the most difficult clerical functions in support of the division. The Case Management Division is responsible for the administration of the tax appeals program overseen by the Office of Tax Appeals. In this role, the incumbent provides document management and support services, mail distribution, and various administrative services tasks for division staff.				
Candidate must be able to perform the following essential job functions with or without reasonable accommodation.				
PERCENTAGE OF TIME SPENT		DUTIES		
35%		The duties of this position will include, but will not be limited to the following: Essential Job Functions: Prepares and scans all appeal material for Franchise and Income Tax (FIT) Appeals, Business Tax (BT) Appeals, and other appeal matters that are scheduled to be decided by the Office of Tax Appeals using Adobe Acrobat Pro and a high-quality scanner. Responsible for determining where bookmarks should be placed, how they are labeled, and where separator pages are to be inserted within the material. Performs quality review to ensure that the proper documents have been scanned correctly and successfully. Using the Office of Tax Appeals (OTA) case management system (iOTA), uploads all scanned material to the corresponding appeals case file.		
25%		Using Adobe Acrobat Pro and files uploaded into OTA's case management system, electronically update previously scanned files with additional material provided during the additional briefing process or the petition for rehearing process. Determine where additional bookmarks		

15%	should be placed and how they are labeled. Upload updated scanned files to corresponding case files. In coordination with the Hearings Analyst and Appeals Analysts in the division, the incumbent assists with drafting correspondence to appellants, their representatives and other agencies regarding their appeals case and/or upcoming scheduled hearing. Assist the analysts with filing and maintaining of physical and electronic appeals case files.
15%	Creates cases, accounts and contacts using the OTA's case management system for appeals received from taxpayers and uploads all case documents into the system. Reviews appeal documentation to assign cases to appropriate analyst. Creates physical files for all appeals. In coordination with the Appeals Analysts in the division, the incumbent assists with the processing, filing, and maintaining of physical files of appeal cases during the appeal process.
5%	Perform redaction requests for innocent spouse relief appeals that are being handled in the Case Management Division. Redactions of these types of appeals is necessary to ensure that the personal identifying information of one spouse is not provided to the other spouse.
5%	Marginal Job Functions: Serves as back-up for other Office Technicians within Case Management Division. Performs special assignments as assigned by supervisor within the skills and knowledge of an Office Technician classification.

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

- The workstation is equipped with standard or ergonomic office equipment, as appropriate.
- Travel by car may be required to attend meetings or training classes.
- This position is in-office and may be eligible for telework.

Physical Abilities:

- Knowledge and ability to operate a computer with a keyboard and other office equipment, such as a telephone, copier and scanning machine.
- Knowledge of Adobe, Microsoft office suites, Outlook, Excel, Word, and Zoom
- Requires prolonged sitting and or standing at a workstation for 6.5 to 7 hours per day. Telework schedule may be considered.
- Requires ability to complete tasks that require making repetitive hand movements in the performance of daily duties.

Additional Requirements/Expectations:

- Understanding of OTA's goals and willingness to adhere to OTA's Code of Conduct.
- 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 assignments with minimal supervision.
- Must be able to work independently or in a team environment.
- Must have strong communication skills and work well under pressure when meeting short deadlines.
- Must exercise a high degree of initiative, demonstrate independent judgement, and discretion.
- Ability to plan, organize and prioritize workload.
- Ability to type at a minimum speed of 45 words per minute.
- Ability to provide effective customer service to internal and external customers and take appropriate action.

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: