



OFFICE OF TAX APPEALS

OBJECTIVE. TRANSPARENT. ACCOUNTABLE.

☐ CURRENT
☒ PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS Monday – Friday/8:00AM – 5:00PM			EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION Analyst I			WORKING TITLE Administrative Assistant	
DIVISION/OFFICE/UNIT Executive 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) 292-100-5157-800	
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 supervision of the Chief Deputy Director, the Analyst I performs various basic administrative duties in support of executive operations and departmental programs. The Analyst I exercises a degree of initiative in coordinating administrative activities, maintaining confidential information, and ensuring efficient day-to-day operations of the Executive Office. The incumbent serves as a liaison with internal staff and provides administrative support related to scheduling, travel coordination, human resources liaison activities, and executive correspondence and records management. 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: Schedules and/or coordinates meetings and training sessions for department staff and executive management with Outlook, Teams and Zoom software/platforms. Acts as meeting secretary, including preparing agendas, informational packets, and supporting documentation; setting up meeting and training rooms; and taking and transcribing meeting minutes for assigned meetings utilizing Microsoft Word. Prepares departmental agenda items and meeting packets. Maintains recurring meeting schedules and mailing lists. Coordinates executive team calendars considering scheduling priorities to ensure efficient workflow and timely communication via Outlook. Assists with ticketing and tracking systems for Executive staff and ensures timely follow-up and resolution of assigned items. Maintains an organized archive of completed work products, presentations, and speaking engagements conducted on behalf of Executive staff.		

25%	Coordinates travel arrangements for Executive staff, including conferences, meetings, trainings, and other official business activities using Concur. Prepares travel itineraries and supporting documentation and ensures compliance with departmental travel policies and procedures. Maintains accurate and detailed travel-related records, verifies accuracy of information, researches discrepancies, and records information in appropriate tracking systems. Prepares and remits travel claims on behalf of staff via CalATERS.
25%	Provides basic administrative support to Executive staff, including maintaining confidential files, responding to inquiries, drafting correspondence, monitoring assignments and deadlines, and coordinating administrative projects. Prepares and maintains accurate timekeeping documents for Executive staff utilizing state timesheets and Docusign. Prioritizes assignments in coordination with leadership ensuring timely completion of work products.
15%	Serves as Human Resources liaison for the Executive staff by coordinating and processing personnel-related documents and communications. Coordinates hiring activities from start to finish, including scheduling interviews, maintaining and submitting hiring documentation to Human Resources, conducting reference checks, and coordinating communication with candidates and hiring managers throughout the recruitment process. Maintains accurate and detailed records, verifies accuracy of information, and records information in appropriate databases and tracking systems. Assists staff with HR-related administrative processes and ensures confidentiality of sensitive personnel information.
5%	Marginal Job Functions: Performs other duties as assigned.

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

- Workstation equipped with standard or ergonomic office equipment, as appropriate.
- Travel may be required to 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.
- Proficient in Microsoft Office applications including Word, Excel and Outlook.

Additional Requirements/Expectations:

- Pursuant to California Code of Regulations, Title 2, section 172, all employees shall possess the general qualifications of integrity, honesty, sobriety, dependability, industry, thoroughness, accuracy, good judgment, initiative, resourcefulness, courtesy, ability to work cooperatively with others, willingness and ability to assume the responsibilities and to conform to the conditions of work characteristic of the employment, and a state of health, consistent with the ability to perform the assigned duties of the class.
- Understanding of OTA's policies 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.
- Ability to be tactful and use good judgement.
- Excellent interpersonal skills.
- Ability to carry out assignments without detailed instructions and with inflexible deadlines.
- Demonstrate capacity for assuming increasing responsibility.

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:



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SCHEDULE TO BE WORKED/WORKING HOURS Monday – Friday/8:00AM – 5:00PM			EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION Analyst II			WORKING TITLE Administrative Assistant II	
DIVISION/OFFICE/UNIT Executive Division			SPECIFIC LOCATION ASSIGNED TO 400 R Street, Sacramento, CA 95811	
CBID E97	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) 292-100-5393-001	
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 direction of the Chief Deputy Director, the Analyst II performs a wide variety of complex administrative and clerical duties in support of executive operations and departmental programs. The Analyst II exercises a high degree of initiative, discretion, and independent judgment in coordinating administrative activities, maintaining confidential information, and ensuring efficient day-to-day operations of the Executive Office. The incumbent serves as a liaison with internal staff and external stakeholders and provides administrative support related to scheduling, travel coordination, human resources liaison activities, and executive correspondence and records management.				
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: Schedules and/or coordinates meetings and training sessions for department staff and executive management with Outlook, Teams and Zoom software/platforms. Acts as meeting secretary, including preparing agendas, informational packets, and supporting documentation; setting up meeting and training rooms; and taking and transcribing meeting minutes for assigned meetings utilizing Microsoft Word. Prepares departmental agenda items and meeting packets. Maintains recurring meeting schedules and mailing lists. Manages executive team calendars and coordinates scheduling priorities to ensure efficient workflow and timely communication via Outlook. Manages assigned ticketing and tracking systems for Executive staff and ensures timely follow-up and resolution of assigned items. Maintains an organized archive of completed work products, presentations, and speaking engagements conducted on behalf of Executive staff.			
Mailing Address: P.O. Box 989880, West Sacramento, CA 95798 • ota.ca.gov • 916.492.2635				

25%	Coordinates travel arrangements for Executive staff, including conferences, meetings, trainings, and other official business activities using Concur. Prepares travel itineraries and supporting documentation and ensures compliance with departmental travel policies and procedures. Maintains accurate and detailed travel-related records, verifies accuracy of information, researches discrepancies, and records information in appropriate tracking systems. Prepares and remits travel claims on behalf of staff via CalATERS.
25%	Provides general administrative support to Executive staff, including maintaining confidential files, responding to inquiries, drafting correspondence, monitoring assignments and deadlines, and coordinating administrative projects. Prepares and maintains accurate timekeeping documents for Executive staff utilizing state timesheets and Docusign. Exercises independent judgment in prioritizing assignments and ensuring timely completion of work products.
15%	Serves as Human Resources liaison for the Executive staff by coordinating and processing personnel-related documents and communications. Coordinates hiring activities from start to finish, including scheduling interviews, maintaining and submitting hiring documentation to Human Resources, conducting reference checks, and coordinating communication with candidates and hiring managers throughout the recruitment process. Maintains accurate and detailed records, verifies accuracy of information, and records information in appropriate databases and tracking systems. Assists staff with HR-related administrative processes and ensures confidentiality of sensitive personnel information.
5%	Marginal Job Functions: Performs other duties as assigned.
WORK ENVIRONMENT OR PHYSICAL ABILITIES REQUIRED FOR THE JOB (if applicable):	
Work Environment: • Workstation equipped with standard or ergonomic office equipment, as appropriate. • Travel may be required to 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. • Proficient in Microsoft Office applications including Word, Excel and Outlook.	

Additional Requirements/Expectations:

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EMPLOYEE'S SIGNATURE

DATE

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PRINT SUPERVISOR NAME

SUPERVISOR'S SIGNATURE

DATE

HRO Approval Date:

C&P Analyst Initials: