

California Department of Tax and Fee Administration

DUTY STATEMENT

☐ CURRENT
☐ PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS Monday – Friday / 8:00am – 5:00pm		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION Analyst II		WORKING TITLE Operations Analyst	
DIVISION/OFFICE/UNIT Financial Management Division/Tax Revenue Branch (TRB)		SPECIFIC LOCATION ASSIGNED TO Sacramento, CA - Headquarters Office	
SEERA DESIGNATION Rank and File	BARGAINING UNIT 01	WORK WEEK GROUP 2	CERTIFICATES REQUIRED None
FINGERPRINTS/BACKGROUND CHECK REQUIRED ☒ Yes ☐ No	BILINGUAL POSITION ☐ Yes ☒ No	SUPERVISION EXERCISED May act as lead	
INCUMBENT		POSITION NUMBER (Agency-Unit-Class-Serial) 291-366-5393-007	
<i>The mission of the California Department of Tax and Fee Administration is to make life better for Californians by fairly and efficiently collecting the revenue that supports our essential public services.</i>			
POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS Under the direction of the Supervisor I, the Analyst II will independently perform the more responsible, varied, and complex analytical and technical staff services assignments and duties related to the Tax Revenue Branch. The Analyst II's responsibilities and duties include, but are not limited to, independently analyzing operational, staffing, and equipment needs of the Tax Revenue Branch; leading teams tasked with identifying operational opportunities and implementing new processes; and analyzing and determining the impact of proposed workflows to the business.			
Candidate must be able to perform the following essential job functions with or without reasonable accommodation.			
PERCENTAGE OF TIME SPENT	DUTIES		
40%	<u>ESSENTIAL JOB FUNCTIONS</u> Independently analyze current processes related to functions performed by the Tax Revenue Branch in support of Board objectives related to business process efficiency and effectiveness. Compile and analyze data from several employee reporting databases such as Daily Activity Database (DAS), Documentum, Check21, etc. to identify staffing, equipment, and operational needs and opportunities for improved effectiveness and efficiency. Conduct workload analyses to assist management in ensuring that they optimize expenditures and allocate resources where appropriate in order to maximize efficiency. Draft issue papers and present proposals to management related to re-engineering business processes to achieve identified cost and time efficiencies. Assist senior management and the Check 21 Project team in conducting studies and surveys for the determination of improved document flows, more efficient workload distribution, and the reengineering of established processes. Facilitate meetings with CDTFA and other state agencies' stakeholders to communicate and achieve business objectives.		
40%	Make recommendations to management regarding the development of efficiencies within current processes of Taxpayer Records Imaging, Check21 and other related automated projects as they relate to the Tax Revenue Branch. Gather and analyze data related to projects such as, but not limited to, Scan at the Front Door and Mass Mail. Continually analyze and evaluate Cashier and Data Entry processing procedures and workflows and make recommendations for improvements. Develop new procedures that support and detail the ever-changing processes in the production environment. Monitor newly implemented processes for effectiveness. Modify procedures to achieve accuracy and effectiveness as necessary. Working knowledge of Microsoft Products such as Word, Excel, Power Point, etc. Act as lead in presenting and implementing new processes.		
15%	Prepare project status reports as requested by management. Review, update, and maintain the procedural manuals and desk reference materials for the Tax Revenue Branch. This process includes gathering, reviewing and analyzing data within the units to update and develop processes and procedures.		

5%

MARGINAL JOB FUNCTIONS

Perform other job-related duties as required.

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

- Position may be located in a high-rise building.
- Office setting with an open floor plan and low partitions.

Physical Abilities:

- Remain in a stationary position for extended periods of time.
- Work on a personal computer (PC) for extended periods of time.
- Consistent travel throughout a high-rise building.

Additional Requirements/Expectations:

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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

HRB Approval Date: 07/23/2026

C&P Analyst Initials: EH