California Department of Tax and Fee Administration

DUTY STATEMENT

☐ CURRENT
☐ PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION		WORKING TITLE	
Supervisor I		**Supervisor, Document Management Unit**	
DIVISION/OFFICE/UNIT		SPECIFIC LOCATION ASSIGNED TO	
EAD/Forms and Publication Section		**Sacramento - Headquarters**	
SEERA DESIGNATION	BARGAINING UNIT	WORK WEEK GROUP	CERTIFICATES REQUIRED
Supervisory	**01**	**E**	**None**
FINGERPRINTS/BACKGROUND CHECK REQUIRED	BILINGUAL POSITION	SUPERVISION EXERCISED	
☐ Yes ☒ No	☐ Yes ☒ No	**Yes**	
INCUMBENT		POSITION NUMBER *(Agency-Unit-Class-Serial)*	
		291-317-4800- XXX	

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.

POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS

Under the general direction of the Supervisor II, Forms & Publications Section, the Supervisor I, Document Management Unit, plans, organizes, supervises, and directs the administration of the California Department of Tax and Fee Administration's (CDTFA) and the Board of Equalization's (BOE) forms intake and management program. The Supervisor I also performs professional duties to plan, develop, evaluate, and disseminate critical tax forms and information to the public, registered taxpayers, and government entities.

Candidate must be able to perform the following essential job functions with or without reasonable accommodation.

PERCENTAGE OF TIME SPENT	DUTIES
	ESSENTIAL JOB FUNCTIONS
45%	Manages and directs the activities of team members engaged in conducting the department's forms management program. Oversees the review, production, editing, design, and distribution of critical tax forms and other written materials; the management of the centralized system to track, calendar, and schedule all jobs; the application of form and department standards; and the provision of technical support for electronic forms development. Hires and trains new team members; prepares annual performance evaluations and training development plans; recommends merit salary adjustments and promotions; creates and reviews assignments; provides review and approval for time off, travel claims, overtime; and handles disciplinary actions, adverse actions, and grievances.
40%	Initiates and conducts analytical studies and develops department-wide policies and practices related to forms intake, content, design, production, distribution, supply, and printing. Evaluates the changing technological environment and plans for the utilization of new technologies to ensure department forms are scheduled and produced in a cost-effective, timely, and accurate manner, as well as professional and readable in content and design. Develops, establishes, and maintains department standards for forms design. Reviews, analyzes, and evaluates the impact of policy and legislative changes as they relate to the forms management program. Develops program plans and budget change proposals related to forms management functions. Researches best practices for managing team members remotely and develops tools to ensure productivity and standards are met.
10%	Edits and reviews forms. Consults with and provides writing, editing, design, and production advisory services to department management and program staff in connection with all phases of the forms intake and management program.

5%	**MARGINAL JOB FUNCTIONS** Assists the section Supervisor II with special projects as needed. Provides back-up in their absence and performs other job-related duties as required.

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

Work Environment:

- May work in high-rise building

Physical Abilities:

- Ability to access and use a personal computer, office equipment and/or telephone daily.
- Ability to remain in a stationary position, consistent with office work, for extended periods of time

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: 10/27/2026	**C&P Analyst Initials: JB**