California Department of Tax and Fee Administration

DUTY STATEMENT

☒ CURRENT
☒ PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION		WORKING TITLE	
Executive Assistant		**Executive Assistant**	
DIVISION/OFFICE/UNIT		SPECIFIC LOCATION ASSIGNED TO	
Field Operations Division/ Fresno/Compliance		Fresno, CA	
SEERA DESIGNATION	BARGAINING UNIT	WORK WEEK GROUP	CERTIFICATES REQUIRED
Rank and File	**04**	**2**	
FINGERPRINTS/BACKGROUND CHECK REQUIRED	BILINGUAL POSITION	SUPERVISION EXERCISED	
☒ Yes ☐ No	☐ Yes ☒ No	**None**	
INCUMBENT		POSITION NUMBER *(Agency-Unit-Class-Serial)*	
		291- 043 **-1728-** 001	

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 direction of the Business Taxes Administrator III, the Executive Assistant provides administrative support to the Office Administrator on sensitive departmental and/or program issues by performing a variety of technical, analytical, and clerical tasks relating to the administration of the Field Operations Division. The incumbent performs a wide variety of complex secretarial tasks that require confidentiality and a substantial degree of autonomy, relieving the Office Administrator of routine administrative details. The Executive Assistant may act as the HRB Liaison and supports the office team and the Administrator by organizing, maintaining, and facilitating a variety of office functions. The incumbent may be required to assist other offices with essential job functions and duties as needed. Travel may be required up to 5% of the time for training.

This position is defined as Office-centered, requiring the incumbent to spend most of their time working in the office on a single day (CMAP 1014).

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

PERCENTAGE OF TIME SPENT	DUTIES
	ESSENTIAL JOB FUNCTIONS
30%	Coordinates onboarding activities, including but not limited to, preparation and submission of personnel documentation and orientation support. Maintains employee records, updates timekeeping systems, and ensures team members are properly added to internal communication systems. Provides guidance to employees regarding benefits, payroll inquiries, leave balances, and HR documentation. Administers timekeeping functions, including reviewing timesheets, monitoring leave balances, and resolving discrepancies. Initiates and coordinates personnel transactions, including but not limited to hiring, transfers, promotions, separations, and bilingual pay. Maintains staffing reports, vacancy tracking logs, and interview scheduling processes. Coordinates HR compliance activities, including annual policy certifications and required disclosures. Coordinates employee offboarding processes, which may include recovery of equipment and access credentials. Assists employees with the benefits of enrollment, open enrollment, and dependent recertification. Prepares or reviews payroll dock reports and coordinates payroll-related adjustments with HR personnel. Provides support to team members by addressing HR-related inquiries, offering guidance, and directing staff to appropriate resources and information.
25%	Ensures federal and California labor law notices are current and properly posted. Maintains administrative records and internal control documentation in shared systems such as BOX and SharePoint. Serves as office Receipts Custodian, which may include maintaining receipt logs and preparing reports. Coordinates shipping and receiving services, which may include package preparation, tracking, and distribution. Supports the development of office procedures, manuals, and training materials. Coordinates office events, outreach activities, and team member engagement initiatives. Coordinates conference room scheduling and meeting equipment readiness. Provides comprehensive administrative and operational support to the office by assisting all team members with a wide range of tasks, ensuring efficient workflow and consistent, high-quality service.

20%	Coordinates and manages the Administrator's calendar, meetings, events, and administrative deadlines. May prepare and submit travel claims, or handle other travel-related matters, on behalf of the Administrator. Attends meetings and prepares summaries, minutes, and supporting documentation for leadership review. Screens and routes visitors, calls, and correspondence to the appropriate team member while prioritizing items requiring the Administrator's attention. Maintains reference materials, policy documentation, and administrative resources for leadership use. Research information and prepare memoranda, briefing materials, and administrative justifications. Provides ongoing executive support to the Administrator by assisting with a variety of operational, administrative, and organizational needs as they arise.
20%	Submits and tracks facility repair and maintenance requests and coordinates with vendors and property management. Coordinates building access and security requirements, which may include visitor notifications, badge reconciliation, and suite access documentation. Maintains workstation assignments, system access user Information, and workspace readiness for staff. Ensures compliance with workplace safety requirements, including, but may not be limited to, quarterly inspections and safety equipment logs. Maintains facility records, including remote-worker schedules, key-control logs, and equipment tracking. Coordinates and facilitates the resolution of office facility issues by working with appropriate staff and support units to ensure timely maintenance, repairs, and operational needs are addressed. May process CHP receipts in the FI$CAL system, as well as any other required FI$Cal receipts, for payment. Ensure proper documentation and reconciliation of purchases. Prepares and submits BAS requests for necessary procurement and or contract needs such as office supplies, equipment, outreach materials, and recruitment event services: monitors inventory levels and coordinates receipt of purchased items. Completes Stock Received Reports (SRR) and enters purchase receipt information into FI$CAL. Coordinates procurement communication between team members, the Acquisitions Unit, recruiters, and Accounting to ensure timely payment and processing. Assists with contract processing activities, including BAS requests, Statements of Work (SOW), CDTFA-478 documentation, vendor quotes, cost analysis and required processes and documentation.
	MARGINAL JOB FUNCTIONS
5%	Performs other job-related duties to cover the workload.

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

Work Environment:

- May work in a high-rise building
- Standard office environment
- Parking Varies by location

Physical Abilities:

- Remain in a stationary position for extended periods of time to meet operational needs and critical deadlines
- Use a computer/laptop, office equipment, and telephone daily
- Ability to transfer and transport materials, supplies, and equipment weighing up to thirty (30) pounds with or without reasonable accommodation

Additional Requirements/Expectations:

- Travel may be required to meet training requirements, which may include overnight.
- Must be flexible and willing to adjust to changing work schedules, if required, for operational needs.

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: 04/13/2026	**C&P Analyst Initials: DF**