

POSITION STATEMENT

1. POSITION INFORMATION	
CIVIL SERVICE CLASSIFICATION: Tax Compliance Representative	WORKING TITLE: <i>Tax Compliance Representative</i>
NAME OF INCUMBENT: <i>Click here to enter text.</i>	POSITION NUMBER: 280-778-8695-xxx
OFFICE/SECTION/UNIT: Analysis Resolution and Correspondence Organization	SUPERVISOR'S NAME: <i>Click here to enter text.</i>
DIVISION: Tax Processing and Accounting	SUPERVISOR'S CLASSIFICATION: Tax Administrator I, EDD
BRANCH: Tax	REVISION DATE: 2/20/2019
Duties Based on: <input checked="" type="checkbox"/> FT <input type="checkbox"/> PT– Fraction _____ <input type="checkbox"/> INT <input type="checkbox"/> Temporary – _____ hours	
2. REQUIREMENTS OF POSITION	
Check all that apply: <input checked="" type="checkbox"/> Conflict of Interest Filing (Form 700) Required <input type="checkbox"/> Call Center/Counter Environment <input type="checkbox"/> May be Required to Work in Multiple Locations <input checked="" type="checkbox"/> Requires Fingerprinting & Background Check <input type="checkbox"/> Requires DMV Pull Notice <input type="checkbox"/> Bilingual Fluency (<i>specify below in Description</i>) <input type="checkbox"/> Travel May be Required <input type="checkbox"/> Other (<i>specify below in Description</i>)	
Description of Position Requirements: (e.g., qualified Veteran, Class C driver's license, bilingual, frequent travel, graveyard/swing shift, etc.) <i>Click here to enter text.</i>	
3. DUTIES AND RESPONSIBILITIES OF POSITION	
Summary Statement: (Briefly describe the position's organizational setting and major functions)	
<p>Under the close supervision of a Tax Administrator I, the Tax Compliance Representative (TCR) has two primary responsibilities: 1) the production of Client Work Manager (CWM) and Accounting & Compliance Enterprise System (ACES) work items; and 2) the review of the Analysis Resolution and Correspondence Organization (ARCO) staff's production. This involves processing and reviewing adjustments including the creation and approval of refunds; clearing estimated assessments; and the completion of penalty waiver requests, registration of specialized accounts, and the determinations of Vertical Unity of Enterprise (VUE). It is preferred that the incumbent has experience and knowledge of applying tax laws in order to efficiently and accurately respond to correspondence.</p>	

Percentage of Duties	Essential Functions
40%	Processes correspondence from CWM queues, ACES Task queues, and manually received requests from other areas including the Taxpayer Advocate's Office. The TCR makes determinations regarding VUE, processes Specialized Coverage registrations, maintains Disability Insurance Elective Coverage accounts, reviews Sole Shareholder exemption requests, and processes Penalty Waiver Request exceptions. The TCR also works employer correspondence transferred from Program Technician IIIs (PT IIIs) that are considered too complex for the PT III classification.
35%	In accordance with established procedures, reviews the work completed by PT IIIs and other TCRs in ARCO for accuracy and completeness. This requires working proficiently in the CWM and ACES, along with the ability to communicate effectively with staff and management.
15%	Acts as a mentor/coach to staff and provides updates to management on staff's progress and training needs. The TCR may act as a back-up lead for the Senior Tax Compliance Representatives (STCRs) and assist the STCR in training sessions.
5%	Participates on Special Projects, serves on various committees and process improvement groups. The TCR is also required to assist in answering telephone calls from the general public.
Percentage of Duties	Marginal Functions
5%	Performs other duties as assigned.

4. WORK ENVIRONMENT *(Choose all that apply)*

Standing: Occasionally - activity occurs < 33%	Sitting: Continuously - activity occurs > 66%
Walking: Occasionally - activity occurs < 33%	Temperature: Temperature Controlled Office Environment
Lighting: Artificial Lighting	Pushing/Pulling: Not Applicable - activity does not exist
Lifting: Occasionally - activity occurs < 33%	Bending/Stooping: Occasionally - activity occurs < 33%
Other: <i>Click here to enter text.</i>	

Type of Environment:

High Rise Cubicle Warehouse Outdoors Other:

Interaction with Customers:

Required to work in the lobby Required to work at a public counter
 Required to assist customers on the phone Required to assist customers in person
 Other:

5. SUPERVISION EXERCISED:

(List total per each classification of staff)

Click here to enter text.

6. SIGNATURES

Employee's Statement:

I have reviewed and discussed the duties and responsibilities of this position with my supervisor and have received a copy of the Position Statement.

Employee's Name: *Click here to enter text.*

Civil Service Classification
Tax Compliance Representative

Position Number
280-778-8695-xxx

Employee's Signature:		Date:	
Supervisor's Statement: <i>I have reviewed the duties and responsibilities of this position and have provided a copy of the Position Statement to the employee.</i>			
Supervisor's Name: <i>Click here to enter text.</i>			
Supervisor's Signature:		Date:	
7. HRSD USE ONLY			
Personnel Management Group (PMG) Approval			
<input checked="" type="checkbox"/> Duties meet class specification and allocation guidelines.	PMG Analyst Initials	Date Approved	
<input type="checkbox"/> Exceptional allocation, STD-625 on file.	HV	8/23/2021	
Reasonable Accommodation Unit use ONLY <i>(completed after appointment, if needed)</i> <i>If a Reasonable Accommodation is necessary, please complete a Request for Reasonable Accommodation (DE 8421) form and submit to Human Resource Services Division (HRSD), Reasonable Accommodation Coordinator.</i>			
List any Reasonable Accommodations made: <i>Click here to enter text.</i>			

Supervisor: After signatures are obtained, make 2 copies:

- Send a copy to HRSD (via your Attendance Clerk) to file in the employee's Official Personnel File (OPF)
- Provide a copy to the employee
- File original in the supervisor's drop file