

POSITION STATEMENT

1. POSITION INFORMATION	
CIVIL SERVICE CLASSIFICATION:	WORKING TITLE:
Program Technician II	Program Technician II
NAME OF INCUMBENT:	POSITION NUMBER:
<i>Click here to enter text.</i>	280-750-9928-xxx
OFFICE/SECTION/UNIT:	SUPERVISOR'S NAME:
Audit Program San Diego Area Audit Office Technical Audit & Outreach Group	<i>Click here to enter text.</i>
DIVISION:	SUPERVISOR'S CLASSIFICATION:
Field Audit and Compliance	Tax Administrator I, EDD
BRANCH:	REVISION DATE:
Tax	6/1/2024
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 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 checked="" 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.) Occasional travel may be required. Any travel will be related to training or attending meetings.	
3. DUTIES AND RESPONSIBILITIES OF POSITION	
Summary Statement: (Briefly describe the position's organizational setting and major functions)	
Under the general supervision of the Tax Administrator I, the Program Technician II (PT II) is responsible for responding to audit related inquiries and processing routine and the more difficult correspondence in regard to employment tax issues. The PT II ensures compliance with the laws and voluntary compliance with employment taxes. Duties consist of information gathering, account analysis, and processing forms received to generate required account adjustments within the audit program using the Accounting and Compliance Enterprise System (ACES). These functions require interaction with employers regarding the more difficult employment tax issues and providing sensitive and detailed program information and/or direction to the public or employees.	

Percentage of Duties	Essential Functions
30%	<p>AUDIT SUPPORT Para-Professional</p> <p>Conducts pre-audit work involving skip-tracing, account analysis, and Internet searches. Contacts employers to schedule audit appointments, updates case notes and to answer basic questions about the audit process. Creates audit cases on ACES. Provides case support to field auditors that include information gathering, scheduling, copying, mailing, documenting, and setting up of questionable items interview appointments. Records, calendars, and processes incoming Notice of Benefit/Tax Hearings, updates case notes, corresponds with California Unemployment Insurance Appeals Board to send or receive exhibits, notifies auditors and managers of hearing date, time and place, and attaches Notice of Benefit/Tax Hearing notices and all case related documents to ACES. Completes non-status wage verifications on obstructed claims and ensures timely updates to the base wage file. Conducts basic level investigations on obstructed claim follow-up cases. Performs Personal Income Tax abatements (which result in adjustments to tax assessments) and related ACES adjustments.</p>
20%	<p>CUSTOMER SERVICE Para-Professional</p> <p>Performs detailed review of accounts on ACES and researches appropriate processing methods. Obtains necessary information from employers to resolve employment tax issues and makes detailed on-line account adjustments necessary to correct the account. Assists customers in the more difficult advisories, which requires research and application of law unique to the employer's situation. Provides assistance to employers in the areas of wages, employment, tax rates, billing statements and the unemployment insurance reserve account system. Tracks and reports counter contacts. Performs basic level Employer Completed Audits by preparing manual assessments, monitoring the 10 day letter responses and completing the cases. Assists with ACES data entry work and/or general ACES clearance work. Assists customers with payment inquiries, liens, financial adjustments and provides status of lien release letters. Responds to inquiries from the general public over the telephone and in person at the public counter.</p>
15%	<p>ESCROWS Para-Professional</p> <p>Processes escrow calls/correspondence for receiving and reviewing requests for clearances. Works closely with escrow companies in resolving employer account issues in order to perform timely releases.</p>
10%	<p>AUDIT SUPPORT Administrative</p> <p>Files and retrieves related electronic and paper documents as needed. Uploads and attaches documents to ACES as required. Generates audit inquiry letters (Inquiry Regarding Records DE 996L, Inquiry Regarding Records DE 996) and handles follow-up phone calls to non-respondents. Creates audit assignments, investigations and obstructed claims in ACES. Prepares and mails Forwarding Address Locator (DE 23) and Employment Relationship Questionnaire (DE 1870F) forms to workers. Processes and completes School Employees Fund (SEF) obstructed claims, sends SEF Request for Wages (DE6586) to school districts, contacts school districts for follow-ups, attaches DE 6586 and all case related documents to ACES. Processes Disability Insurance Elective Coverage applications.</p>

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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		
Classification and Pay Unit (CPU) Approval		
<input checked="" type="checkbox"/> Duties meet class specification and allocation guidelines.	CPU Analyst Initials	Date Approved
<input type="checkbox"/> Exceptional allocation, STD-625 on file.	NSW	4/29/2026
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

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Program Technician	Program Technician
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<i>Click here to enter text.</i>	280-750-9927-xxx
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Description of Position Requirements: (e.g., qualified Veteran, Class C driver's license, bilingual, frequent travel, graveyard/swing shift, etc.) Occasional travel may be required. Any travel will be related to training or attending meetings.	
3. DUTIES AND RESPONSIBILITIES OF POSITION	
Summary Statement: (Briefly describe the position's organizational setting and major functions)	
Under the close supervision of the Tax Administrator I, the Program Technician is responsible for the less difficult program specialist work and responds to employment tax-related telephone/counter inquiries and processes routine correspondence; ensures compliance with laws, regulations, and policies; assists the taxpayer in complying with the laws; and ensures voluntary compliance with employment taxes. Duties consist of information gathering, account analysis, and processing forms received using the Accounting and Compliance Enterprise System (ACES).	
Percentage of Duties	Essential Functions
35%	AUDIT SUPPORT Para-Professional Conducts basic pre-audit work involving skip-tracing, account analysis, and Internet searches. Contacts employers to schedule audit appointments, update case notes and to answer basic

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	<p>questions about the audit process. Performs basic account updates on ACES such as updating bank account information and taxpayer attributes. Provides case support to field auditors: copying, mailing, and attaching files/records. Attaches benefit/tax hearing notices and all case-related documents to ACES. Prepares and mails Forwarding Address Locator (DE 23) and Employment Relationship Questionnaire (DE 1870F) forms to questionable workers.</p>
20%	<p>CUSTOMER SERVICE Para-Professional</p> <p>Performs basic account adjustments on ACES using knowledge of appropriate processing procedures. Assists customers with routine advisories entailing observance of applicable laws, policies, and procedures. This includes advisories which require research, basic reporting and payment knowledge, and application of law unique to the employer's situation. Obtains necessary information from employers to resolve basic tax issues and makes the less difficult on-line adjustments necessary to correct the account. Provides clear explanations to the employer regarding the status of the account, for example, explaining report delinquencies, payment applications and liabilities. Provides assistance to employers in the areas of wages, employment, tax rates, billing statements and the unemployment insurance reserve account system. Tracks and report counter contacts. Respond to inquiries from the general public over the telephone and in person at the public counter.</p>
15%	<p>ESCROWS Para-Professional</p> <p>Processes escrow calls/correspondence for receiving and reviewing requests for clearances. Works closely with escrow companies in processing employer accounts in order to perform timely releases.</p>
15%	<p>CUSTOMER SERVICE Administrative</p> <p>Ensures customers obtain the correct forms and publications for proper reporting. Accesses information on ACES, interprets routine information and provides it to the taxpayers. Answers reporting questions from taxpayers such as tax rate information. Provides taxable wage limits and other facts that require knowledge of tax laws and procedures. Assists and educates employers in completing state payroll tax forms. Informs employers of pending workshops and seminars. Assists taxpayers on how to navigate within the Department's Internet/website and e-Services.</p>
10%	<p>AUDIT SUPPORT Administrative</p> <p>Files and retrieves related electronic and paper documents as needed. Uploads and attaches documents to ACES as needed. Generates audit inquiry letters (Inquiry Regarding Records DE 996L, Inquiry Regarding Records DE 996) and handles follow-up phone calls to non-respondents. Creates audit assignments, investigations and obstructed claims on ACES. Processes School Employees Fund (SEF) obstructed claims; sends SEF Requests for Wages, (DE 6586) to school districts, contacts school districts for follow-ups, attaches DE 6586 and all case related documents to ACES, on an as needed basis. Processes Disability Insurance Elective Coverage claims as needed.</p>
Percentage of Duties	Marginal Functions
5%	Performs other duties as assigned.

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4. WORK ENVIRONMENT <i>(Choose all that apply)</i>		
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: Occasionally - activity occurs < 33%	
Lifting: Occasionally - activity occurs < 33%	Bending/Stooping: Occasionally - activity occurs < 33%	
Other: <i>Click here to enter text.</i>		
Type of Environment: <input type="checkbox"/> High Rise <input checked="" type="checkbox"/> Cubicle <input type="checkbox"/> Warehouse <input type="checkbox"/> Outdoors <input type="checkbox"/> Other: <i>Click here to enter text.</i>		
Interaction with Customers: <input type="checkbox"/> Required to work in the lobby <input type="checkbox"/> Required to work at a public counter <input checked="" type="checkbox"/> Required to assist customers on the phone <input checked="" type="checkbox"/> Required to assist customers in person <input type="checkbox"/> Other: <i>Click here to enter text.</i>		
5. SUPERVISION EXERCISED: <i>(List total per each classification of staff)</i>		
None		
6. SIGNATURES		
Employee's Statement: <i>I have reviewed and discussed the duties and responsibilities of this position with my supervisor and have received a copy of the Position Statement.</i>		
Employee's Name: <i>Click here to enter text.</i>		
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:	
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- Provide a copy to the employee
- File original in the supervisor's drop file