

POSITION STATEMENT

1. POSITION INFORMATION	
CIVIL SERVICE CLASSIFICATION:	WORKING TITLE:
Tax Administrator I	Tax Administrator I
NAME OF INCUMBENT:	POSITION NUMBER:
	280-735-4332-001
OFFICE/SECTION/UNIT:	SUPERVISOR'S NAME:
Special Procedures Section/Special Procedures Group	Francisco Aguilung
DIVISION:	SUPERVISOR'S CLASSIFICATION:
Collection Division	Tax Administrator II
BRANCH:	REVISION DATE:
Tax	5/7/2026
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 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 is required for training or meetings, which may require overnight stays.	
3. DUTIES AND RESPONSIBILITIES OF POSITION	
Summary Statement: (Briefly describe the position's organizational setting and major functions)	
<p>Under the general direction of the Section Chief, a Tax Administrator (TA) II, the TA I plans, organizes and evaluates the operations and activities of the SPG. The incumbent is responsible for directing subordinate staff engaged in providing aid and advice to division staff, and providing general compliance support for the Collection Division programs. The incumbent carries out the group's mission to perform workloads in a progressive manner to meet our stated goals, while balancing the needs of internal and external customers, staff resources and workload priorities. The incumbent assists the Section Chief with critical functions, workloads and processes. The incumbent actively participates as a leader and contributing member of the Collection Division management team for planning, organizing, and decision-making processes. The incumbent works in collaboration with other members of the Section's management team as well as other divisions, and provides leadership to staff in support of the Section's mission to ensure effective coordination of specialized work activities. The incumbent applies provisions of the Unemployment Insurance Code, Civil Code and other regulations, policies and procedures in the course of managing staff resources, workloads and processes.</p>	

Percentage of Duties	Essential Functions
35%	<p>Plan, organize, and assign SPG workloads to ensure proper utilization of resources. Manage Special Procedure advisory activities to address internal and external customer needs, and to assist program staff with complex, difficult or sensitive cases. Coordinate with the Department's Legal staff or the Attorney General's office to determine best approach for resolving these cases. Advise Division personnel on legal procedures, investigate and refer cases to the State Attorney General's Office for action, research and prepare affidavits for criminal complaint cases for Field Operations and Investigation Division, manage the Offers in Compromise program. Oversee and manage activities pertaining to Lien on Cause, Subordination of Lien, Partial Release of Lien, Claim of Exemption, State Controller Unclaimed Property, Surety Bond, Third party Claim, Interpleader Action, Lien Priority Claim, Summons and Complaint, as well as Criminal Complaint workloads. Monitor and prioritize workflow, production and Operations Plan information to ensure priorities are being met, and identify those items that are outside the normal activities. Oversee inventory levels and workload flow, monitor staff resources, production and activities to ensure progressive actions occur, and determine staff reassignments to manage the more critical workloads. Perform quality reviews to determine if work items are actively worked toward a timely resolution in accordance with workload management goals and expectations. Perform technical reviews of workloads such as Offers in Compromise cases. Select cases for Quality Review discussion with staff, and provide constructive feedback and guidance as well as educate staff on tools and techniques for workload resolution. Review completed work of subordinate staff for accuracy and timeliness. Identify training needs of staff, during the review. Act as a technical advisor and/or consultant in partnership with the other divisions to research, evaluate, analyze and develop resolutions or pursue legal actions relative to complex workload issues. Partner with internal customers, as well as other regulatory agencies, such as Franchise Tax Board, Board of Equalization and Internal Revenue Service. Oversee outreach efforts to educate program management, staff and the employer/claimant community about laws, regulations, and processes.</p>
30%	<p>Manage staff resources and conduct administrative oversight activities to direct, supervise, train, coach and mentor SPG staff. Follow sound personnel practices pursuant to the Supervisor's Handbook, Personnel Management Handbook, other policy/procedural guidelines, and collective bargaining contracts. Communicate policy and procedures, and share information of importance with staff. Manage recruitment and hiring activities such as interviewing, background and reference checks, review of Official Personnel Files, selection of staff, as well as assisting peer managers with hiring panel efforts and/or the bilingual exam process. Review and evaluate subordinate staff to identify and initiate action on conduct and/or performance issues. Coach, counsel and evaluate staff through timely probationary reports, Individual Development Plans, and career development discussion. Create opportunities for teamwork and recognize diversity of each team member. Cultivate a work environment that stimulates learning and encourages growth. Oversee training of new staff through seasoned trainers to build staff capacity in order to ensure staff resources can be directed to different workloads as needed.</p>
20%	<p>Promote and endorse the Balanced Scorecard concepts to achieve balance between collections, customer service, development and culture, and operational effectiveness activities and business results. Manage and be accountable for all components of the Business Results Planning Process (BRPP) that fall within incumbent's area of responsibility. Use the various</p>

10%	<p>BRPP tools and processes as well as technology to manage business operations. Use automated processes and a diverse set of tools to carry out the responsibility of monitoring and evaluating the effectiveness of the program, to conduct broader workload management activities, statistical data comparison and trend analysis, prepare operational reports and management information reports on the activities of staff and other administrative tasks. Use Key Performance Indicators (KPI) to measure the effectiveness of the business operations to strategically plan and address economic change. Review, analyze and evaluate processes based on KPI data. Conduct monthly meetings with staff to share KPI business results for discussion as a team, and engage staff in discussing and understanding future performance goals. Prepare reports for management that discuss the KPI findings, trends identified and factors affecting those trends. Meet with higher-level management to discuss KPIs and business results relative to area of responsibility, plan and strategies for the coming year. Oversee staff efforts to determine business process improvement opportunities, and to solicit and incorporate ideas for improving processes. Cultivate an environment that ensures consistent quality service to the employer and claimant community and other internal/external customers. Conduct technical reviews to ensure proper internal control mechanisms are in place. Perform a review of operations to self-certify the level of compliance with regulations, policies, and procedures, through the Validation and Review Process.</p> <p>Assist higher-level management in planning, organizing, directing, and evaluating business operations and activities of staff engaged in compliance activities and support processes. Assist management with budget planning and report preparation concerning program activities. Review and analyze legislation and major policy changes to determine the impact on the organization. Recommend legislation and policy to address the needs of the Division. Recommend proposed revisions to notices, manuals and forms. Build and maintain strong partnerships with other entities throughout the department and other venues. Serve on committees and task forces.</p>
Percentage of Duties	Marginal Functions
5%	Lead and/or participate on special projects or assignments that have programmatic or department-wide impact, working both independently and in a team environment. Act as Section Chief when necessary. Perform other duties as assigned.
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: Not Applicable - activity does not exist
Lifting: Not Applicable - activity does not exist	Bending/Stooping: Not Applicable - activity does not exist
Other: <i>Click here to enter text.</i>	
Type of Environment:	
<input type="checkbox"/> High Rise <input type="checkbox"/> Cubicle <input type="checkbox"/> Warehouse <input type="checkbox"/> Outdoors <input checked="" type="checkbox"/> Other: Hybrid: Telework/Office	
Interaction with Customers:	
<input type="checkbox"/> Required to work in the lobby <input type="checkbox"/> Required to work at a public counter <input type="checkbox"/> Required to assist customers on the phone <input type="checkbox"/> Required to assist customers in person <input checked="" type="checkbox"/> Other: N/A	
5. SUPERVISION EXERCISED:	
<i>(List total per each classification of staff)</i>	

Civil Service Classification
Tax Administrator I

Position Number
280-735-4332-001

Directly – 5 Senior Tax Compliance Representatives, 3 Tax Compliance Representatives

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:

Employee's Signature:

Date:

Supervisor's Statement:

I have reviewed the duties and responsibilities of this position and have provided a copy of the Position Statement to the employee.

Supervisor's Name:

Supervisor's Signature:

Date:

7. HRSD USE ONLY

Classification and Pay Group (CPG) Approval

Duties meet class specification and allocation guidelines.

CPG Analyst Initials

Date Approved

Exceptional allocation, STD-625 on file.

JMB

8/22/2023

Reasonable Accommodation Unit use ONLY *(completed after appointment, if needed)*

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.

List any Reasonable Accommodations made:

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