

POSITION STATEMENT

1. POSITION INFORMATION	
CIVIL SERVICE CLASSIFICATION:	WORKING TITLE:
Tax Compliance Representative	<i>Tax Compliance Representative</i>
NAME OF INCUMBENT:	POSITION NUMBER:
	280-732-8695-xxx
OFFICE/SECTION/UNIT:	SUPERVISOR'S NAME:
Benefit Overpayment Collection Section /Collection Groups 1-5	
DIVISION:	SUPERVISOR'S CLASSIFICATION:
Collection Division	Tax Administrator I, EDD
BRANCH:	REVISION DATE:
Tax	5/6/2026
Duties Based on: ☒ FT ☐ PT– Fraction _____ ☐ INT ☐ Temporary – _____ hours	
2. REQUIREMENTS OF POSITION	
Check all that apply: ☐ Conflict of Interest Filing (Form 700) Required ☐ May be Required to Work in Multiple Locations ☐ Requires DMV Pull Notice ☒ Travel May be Required ☐ Call Center/Counter Environment ☒ Requires Fingerprinting & Background Check ☐ Bilingual Fluency (<i>specify below in Description</i>) ☐ 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 to attend meetings or training.	
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 Tax Compliance Representative (TCR) is responsible for the recovery of Unemployment and Disability Insurance Benefit Overpayments. The TCR reviews and analyzes claimant accounts and explains collection and legal action(s). These activities must be in accordance with applicable laws, policies, and procedures. The TCR should possess basic skills in the use of a personal computer including Microsoft Software applications (i.e. Word, Access, Excel) as well as the various automated systems used within Collection Division.	
Percentage of Duties	Essential Functions
30%	Contacts/Responds to claimants in regard to overpaid benefits. Reviews and analyzes claimant accounts and explain collection and legal action(s). Initiates appropriate collection actions such as filing Summary Judgements (SJ), summary judgement renewals and Earnings Withholding Orders (EWO).

25%	Responds to telephone inquiries that are escalated from the Program Technicians and Program Technicians II and negotiates agreements from claimants to pay in full their benefit overpayments. Responds to general inquiries from claimants, courts, sheriff, and marshal offices.
20%	Responds to Claims of Exemption filed by claimants, including the analysis of financial statements, preparation of the opposition, and scheduling court hearings for claimants. Reviews and analyzes bankruptcy accounts, court and EWO rejects.
20%	Responds effectively to claimant or legal correspondence. Negotiates vacates and/or modifications of judgements, EWO modifications, terminations, audit, and reconciliation of account balances. Process rush satisfactions, escrow demands, bankruptcy, and deceased cases. Performs SJ and EWO follow up with the employers, courts, sheriffs and recorders. Update case information on Single Client Database.
Percentage of Duties	Marginal Functions
5%	Performs 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: ☐ High Rise ☐ Cubicle ☐ Warehouse ☐ Outdoors ☒ Other: Hybrid: Telework/Office	
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)	
N/A	
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:	
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:	
Supervisor's Signature:	Date:

Civil Service Classification
Tax Compliance Representative

Position Number
280-732-8695-xxx

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.	JL	6/17/2022

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