

## POSITION STATEMENT

1. POSITION INFORMATION	
CIVIL SERVICE CLASSIFICATION:	WORKING TITLE:
Program Technician III	<i>Program Technician III</i>
NAME OF INCUMBENT:	POSITION NUMBER:
<i>Click here to enter text.</i>	280-730-9929-xxx
OFFICE/SECTION/UNIT:	SUPERVISOR'S NAME:
Audit Program Sacramento Area Audit Office Technical Audit & Outreach Group	<i>Click here to enter text.</i>
DIVISION:	SUPERVISOR'S CLASSIFICATION:
Field Audit and Compliance Division	Tax Administrator I, EDD
BRANCH:	REVISION DATE:
Tax	5/5/2026
<b>Duties Based on:</b> <input checked="" type="checkbox"/> FT <input type="checkbox"/> PT– Fraction _____ <input type="checkbox"/> INT <input type="checkbox"/> Temporary – _____ hours	
2. REQUIREMENTS OF POSITION	
<b>Check all that apply:</b> <input type="checkbox"/> Conflict of Interest Filing (Form 700) Required <input type="checkbox"/> Call Center/Counter Environment <input checked="" type="checkbox"/> May be Required to Work in Multiple Locations <input checked="" type="checkbox"/> Requires Fingerprinting & Background Check <input checked="" 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 checked="" type="checkbox"/> Other ( <i>specify below in Description</i> )	
<b>Description of Position Requirements:</b> (e.g., qualified Veteran, Class C driver's license, bilingual, frequent travel, graveyard/swing shift, etc.)	
The incumbent may be required to work in an outstation setting which requires a higher level of independence and self-motivation.	
3. DUTIES AND RESPONSIBILITIES OF POSITION	
<b>Summary Statement:</b> (Briefly describe the position's organizational setting and major functions)	
<p>Under the general direction of the Tax Administrator I (TA I), the Program Technician (PT III) will be primarily responsible for responding to audit related inquiries and processing the most complex support work on difficult or multifaceted issues in regard to employment taxes in an out-stationed office, or in a headquarters setting. Ensures compliance with laws, regulations, and policies and assists the taxpayer in complying with the laws. Also ensures voluntary compliance with employment taxes using the Accounting and Compliance Enterprise System (ACES). The PT III is the lead over the program technician support staff with guidance and support from the TA I.</p>	
<b>Percentage of Duties</b>	<b>Essential Functions</b>
25%	As an expert staff resource, conducts pre-audit work involving the most sensitive and complex skip-tracing, account analysis, and Internet searches. Provides consultation to employers on

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	<p>the audit process; and updates case notes. Completes non-status obstructed claims and ensures timely updates to the base wage file. Completes investigations to clear delinquent problems and other minor reporting errors on employers' accounts. Performs Personal Income Tax (PIT) abatements (which result in adjustments to tax assessments) and related ACES adjustments. Reviews PIT abatements. Enters complex account adjustments on ACES. Assigns, coordinates, and reviews the work of the Audit Program Support Unit as the lead. Processes and completes School Employees Fund (SEF) obstructed claims, sends SEF Request for Wages (DE 6586) 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. May be required to work in an outstation setting which requires a higher level of independence and self-motivation.</p>
25%	<p>Acts as a lead person over a program support unit comprised of Program Technicians and Student Assistants. In collaboration with the management team, develops and implements effective work plans to ensure that the various office support functions are efficiently carried out. The PT III will be a working member of this unit. May also act as a facilitator to other workgroups and may be called upon to train staff in any of the duties within their expertise.</p>
15%	<p>Performs detailed analysis of accounts on ACES and researches appropriate processing procedures. Obtains necessary information from employers to resolve complex tax issues and makes detailed on-line account adjustments necessary to correct the account. Provides clear explanations to the employer regarding the status of the account, for example, current employer unemployment insurance tax rate, account balances due, refunds pending, transactions, payment applications and liabilities. Performs account updates, such as ceasing employer accounts, clearing delinquencies and updating employer addresses. Processes ACES updates and adjustments and/or general ACES clearance work and handles converted PIT abatement processing. Performs the most difficult level employer completed audits by preparing manual assessments, monitoring the 10 day letter responses and completing the cases. Assists customers with payment inquiries, liens, financial adjustments and provides status of lien release letters.</p>
15%	<p>Processes escrow calls/correspondence for receiving and reviewing requests for clearances. Works closely with escrow companies in resolving the more complex and sensitive employer account problems to ensure timely releases.</p>
10%	<p>Conducts or assists management in processing inventories, safety inspections and related site duties. May assist PT IIs with service of office machines and computers. Monitors office supply inventories and prepares orders. Performs a wide range of general and clerical duties including cashiering functions, mail duties and processing invoices for payment. Assists in setting up and taking down of equipment, chairs, tables and signage for Tax Branch events at the Area Audit Offices. (i.e. Management visits, training).</p>
5%	<p>Performs or assists staff in the most complex and sensitive advisories. This includes advisories, which require 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. Acts in a lead capacity to ensure customers obtain the correct forms and publications for proper reporting. Answers reporting questions from employers, such as tax rate information, taxable wage limits and other facts that require knowledge of tax laws and procedures. Informs employers of pending workshops and seminars. Assists and educates employers in completing their state payroll tax forms.</p>

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<b>Percentage of Duties</b>	<b>Marginal Functions</b>	
5%	Performs other duties as assigned.	
<b>4. WORK ENVIRONMENT</b> <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>		
<b>Type of Environment:</b> <input type="checkbox"/> High Rise <input checked="" type="checkbox"/> Cubicle <input type="checkbox"/> Warehouse <input type="checkbox"/> Outdoors <input checked="" type="checkbox"/> Other: Hybrid Work Schedule- Telework / In-Office		
<b>Interaction with Customers:</b> <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>		
<b>5. SUPERVISION EXERCISED:</b> <i>(List total per each classification of staff)</i>		
None, may act as lead.		
<b>6. SIGNATURES</b>		
<b>Employee's Statement:</b> <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:	
<b>Supervisor's Statement:</b> <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:	
<b>7. HRSD USE ONLY</b>		
<b>Classification and Pay Unit (CPU) Approval</b>		
<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.	FNB	6/15/2026
<b>Reasonable Accommodation Unit use ONLY</b> <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:		

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*Click here to enter text.*

**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