

## POSITION STATEMENT

1. POSITION INFORMATION	
CIVIL SERVICE CLASSIFICATION: Tax Administrator II, EDD	WORKING TITLE: <i>Area Program Manager</i>
NAME OF INCUMBENT:	POSITION NUMBER: 280-742-4333-002
OFFICE/SECTION/UNIT: Audit Program Area Audit Office	SUPERVISOR'S NAME:
DIVISION: Field Audit and Compliance	SUPERVISOR'S CLASSIFICATION: Tax Administrator III, EDD
BRANCH: Tax	REVISION DATE: 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 checked="" 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 checked="" type="checkbox"/> Travel May be Required <input 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 is required to travel, which may include overnight and/or out of state; work out of the office and/or 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) Under the general direction of the Tax Administrator (TA) III, the TA II Area Audit Program Manager leads and directs the functions of the Area Audit Office, and oversees the California Unemployment Insurance Tax Audit and Personal Income Tax Withholding Programs within an assigned area. Represents the Division and Program on project teams.  The Area Audit Program Manager instills commitment and positive working relationships with other program areas and within the Management Team towards fulfilling the Department's vision, mission, and strategic goals.	
Percentage of Duties	Essential Functions
30%	Plans, organizes, directs, evaluates and manages through subordinate managers or directly, the operations and activities of the Area/Section within the Division's guidelines. Models the vision and values of the Employment Development Department. Coaches and mentors subordinate managers in developing their leadership abilities through regular one-on-

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	one meetings or management team meetings. Works through subordinate managers to promote staff engagement and development by fostering an atmosphere where creativity, leadership, and ingenuity flourish. Provides guidance to subordinate managers to ensure health, safety, and security measures are properly followed. Identifies performance problems early and formulates appropriate plans to improve the performance of the unit.
25%	Leads the Area/Section Management Team. Develops and implements Area/Section policies. Oversees budgets and develops long range plans. Monitors all aspects of personnel issues that impact the Area/Section. Meets and confers with Group/Branch Area Audit Office Managers and their staff to improve the Audit Program. Communicates job expectations to subordinates in a positive, active, and open forum. Ensures the completion of the Leadership Competency Development plan by subordinate supervisors. Assists the Program Manager in addressing administrative, and sensitive issues.
20%	Provides aid, advice, and assistance to Field Audit & Compliance Division management on the most difficult and complex collection and compliance matters. Investigates and answers sensitive or controlled correspondence, while resolving customer concerns. Reviews and resolves all Taxpayer Advocate Office and Settlement offers. Maintains uniform application of audit and compliance policies on a Division-wide basis. Works with Area/Section Management Team to develop and implement a systematic approach to improving all processes. Ensures that appropriate measurements are in place to link customer requirements to key processes. Encourages process improvement suggestions and evaluates the potential impact of improvements on stakeholders. Reviews notices, manuals, and forms for content, accuracy and impact and proposes revisions when appropriate. Recommends legislation and major policy changes and determines the potential impact to the organization. Completes special projects.
15%	Provides necessary assistance, support, and guidance to subordinate managers to ensure they correctly follow and administer personnel policies, including but not limited to the following: Maintain accurate position statements for staff. Ensures staff are properly trained and perform functions within their classifications. Provides on-going constructive feedback to staff through regular one-on-one meetings and timely completion of probationary reports and annual performance appraisals. Establishes and communicates clear job expectations with staff and follow the progressive disciplinary process by identifying performance issues early. Formulate appropriate corrective action plans to improve the performance of staff members and take the appropriate disciplinary action in a timely and appropriate manner. Provides assistance, support, and guidance to subordinate managers to ensure the hiring process is administered properly.
<b>Percentage of Duties</b>	<b>Marginal Functions</b>
5%	Acts as backup for the TA III, in their absence.
5%	Performs other duties as assigned.
<b>4. WORK ENVIRONMENT</b> <i>(Choose all that apply)</i>	
Standing: Occasionally - activity occurs < 33%	Sitting: Frequently - activity occurs 33% to 66%
Walking: Occasionally - activity occurs < 33%	Temperature: Temperature Controlled Office Environment
Lighting: Artificial Lighting	Pushing/Pulling: Occasionally - activity occurs < 33%

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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 type="checkbox"/> Required to assist customers on the phone <input type="checkbox"/> Required to assist customers in person <input checked="" type="checkbox"/> Other: Minimal interaction with customers		
<b>5. SUPERVISION EXERCISED:</b> (List total per each classification of staff)		
Directly - 3-4 TA I's		
<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:		
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:		
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. <input type="checkbox"/> Exceptional allocation, STD-625 on file.	CPU Analyst Initials	Date Approved
	FNB	6/16/2026
<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:		

**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