

POSITION STATEMENT

1. POSITION INFORMATION	
CIVIL SERVICE CLASSIFICATION:	WORKING TITLE:
Student Assistant	Student Assistant
NAME OF INCUMBENT:	POSITION NUMBER:
<i>Click here to enter text.</i>	280-741-4870-946
OFFICE/SECTION/UNIT:	SUPERVISOR'S NAME:
Audit Program San Bernardino 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	5/5/2026
Duties Based on: ☐ FT ☐ PT– Fraction _____ ☐ INT ☒ Temporary – <1500 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.) <i>Click here to enter text.</i>	
3. DUTIES AND RESPONSIBILITIES OF POSITION	
Summary Statement: (Briefly describe the position's organizational setting and major functions)	
Under close supervision by the Tax Administrator I and with support from other program support staff, the Student Assistant handles the less difficult and sensitive assignments; sets up audit assignments by performing basic Accounting and Compliance Enterprise System (ACES) checks, searches files for closed cases and pulls completed cases. Sets up audit/investigation cases, types appropriate forms and assigns cases on ACES.	
Percentage of Duties	Essential Functions
40%	Sets up audit assignments by performing basic ACES checks, searches files for closed cases and pulls completed cases. Sets up audit/investigation case, types appropriate forms and assigns the case on ACES.

35%	Makes appropriate ACES printouts to be included in the audit case assignment. Downloads ACES information on to disks. Performs personal income tax abatements and recomputations, on-line financial adjustments to accounts, and enters comments on ACES. The incumbent performs basic investigations into the status of accounts and makes appropriate account adjustments, prepares and mails audit notification letters, and contacts employers to confirm or clarify audit appointment issues.
10%	Assists with audit selection processes and compiling audit review statistics.
10%	Performs multiple administrative duties, which include typing general correspondence and ruling letters, searching and/or purging files, and other related support activities in the audit program.
Percentage of Duties	Marginal Functions
5%	Performs other duties as assigned.

4. WORK ENVIRONMENT *(Choose all that apply)*

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:

☐ High Rise ☒ Cubicle ☐ Warehouse ☐ Outdoors ☒ Other: Hybrid Work Schedule- Telework / In-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: *Click here to enter text.*

5. SUPERVISION EXERCISED:

(List total per each classification of staff)

None

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: *Click here to enter text.*

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: *Click here to enter text.*

Supervisor's Signature: _____ Date: _____

Civil Service Classification
Student Assistant

Position Number
280-741-4870-946

7. HRSD USE ONLY

Classification and Pay Unit (CPU) Approval

☒ Duties meet class specification and allocation guidelines.	C&P Analyst Initials	Date Approved
☐ Exceptional allocation, STD-625 on file.	JMB	5/5/2026

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:

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