

POSITION STATEMENT

1. POSITION INFORMATION	
CIVIL SERVICE CLASSIFICATION:	WORKING TITLE:
Tax Administrator I, EDD	<i>Field Audit Manager</i>
NAME OF INCUMBENT:	POSITION NUMBER:
<i>Click here to enter text.</i>	280-744-4332-xxx
OFFICE/SECTION/UNIT:	SUPERVISOR'S NAME:
Audit Program San Jose Area Audit Office San Jose Audit Crew 2	
DIVISION:	SUPERVISOR'S CLASSIFICATION:
Field Audit and Compliance	Tax Administrator II, EDD
BRANCH:	REVISION DATE:
Tax	5/5/2026
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.)	
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	
Summary Statement: (Briefly describe the position's organizational setting and major functions)	
Under the direction of a Tax Administrator (TA) II, the TA I supervises, plans, organizes, and directs the efforts of an audit crew engaged in conducting payroll tax audits and broad compliance and customer service activities. In addition, provides leadership for staff addressing petitions and hearings, outreach activities, and audit lead development. Coaches and mentors staff to promote an atmosphere where creativity, leadership, and ingenuity flourish. Identifies performance problems early and formulates appropriate plans to improve the performance of the unit. Communicates job expectations and provides ongoing, constructive feedback.	
Percentage of Duties	Essential Functions
40%	Promotes and models the Vision and Employment Development Department Core Values. Supports the Branch and Division goals. Uses timely and effective communication techniques to continually reinforce job expectations and provides ongoing, constructive feedback to the staff and management. Acts as the primary coach and mentor for the audit crew.

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	Provides appropriate training needs, evaluates the training needs of subordinate audit staff with input from the Staff Tax Auditors (STA). Keeps audit staff informed of new and changed audit procedure and policy. Models continuous learning and development by accompanying staff on field calls to observe their skills and techniques, and to assist them in resolving complex issues. Conducts pre- and post-assessment conferences with employers. In addition, provides leadership for staff addressing petitions and hearings, outreach activities, and audit lead development.
30%	Utilizes the New Auditor Training plan as a tool for on-the-job training for new audit staff. Manages the development and workloads of new audit staff throughout their probationary period. Provides guidance to the STAs in their training activities regarding benefit and tax hearings. Creates an environment of continuous growth and development.
20%	Serves as an essential member of the Area Audit Program Management team. Works closely with the Program Manager to plan, monitor and prioritize workflow within the Area Audit Office. Maintains overall responsibility for the review of audit and obstructed claims. Participates in the selection, hiring and training of staff. Works closely with internal and external customers and fosters new partnerships as needed. Monitors and tracks audit crew production, and collects relevant data to prepare the audit office monthly reports.
Percentage of Duties	Marginal Functions
5%	Acts as the TA II in their absence.
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: 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:	
5. SUPERVISION EXERCISED:	
<i>(List total per each classification of staff)</i>	
1-3 Staff Tax Auditors, 1-10 Associate Tax Auditors/Tax Auditors.	
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>	

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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:
7. HRSD USE ONLY		
Classification and Pay Unit (CPU) Approval		
☒ Duties meet class specification and allocation guidelines.	CPU Analyst Initials	Date Approved
☐ Exceptional allocation, STD-625 on file.	JMB	5/5/2026
Reasonable Accommodation Unit use ONLY <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