Employment Development Department
State of California

☒ Current
☐ Proposed

POSITION STATEMENT

1. POSITION INFORMATION	
CIVIL SERVICE CLASSIFICATION:	WORKING TITLE:
Tax Compliance Representative	*Tax Compliance Representative*
NAME OF INCUMBENT:	POSITION NUMBER:
Click here to enter text.	280-759-8695-xxx
OFFICE/SECTION/UNIT:	SUPERVISOR'S NAME:
Sacramento Area Collection Office	*Click here to enter text.*
DIVISION:	SUPERVISOR'S CLASSIFICATION:
Collection	Tax Administrator I, EDD
BRANCH:	REVISION DATE:
Tax	5/7/2026

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 *(specify below in Description)*
☐ Other *(specify below in Description)*

Description of Position Requirements:
(e.g., qualified Veteran, Class C driver's license, bilingual, frequent travel, graveyard/swing shift, etc.)

Occasional travel is required for Field Calls, which on rare occasions includes an overnight stay.
Rare travel may be required for training or meetings, which rarely may require overnight stays.

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) performs a mixture of routine and complex compliance assignments. Use of judgment and knowledge of statutes, regulations, and compliance procedures is required to resolve delinquent tax liabilities and/or delinquent tax returns. Resolving case assignments may involve contact with the employer or the employer's representative by telephone, written correspondence, field calls or utilization of other collection tools such as 1733/1735 investigations, issuance of warrants, etc. The TCR should possess basic skills in the use of a personal computer or laptop with Microsoft Software applications (i.e., Word, Outlook, Excel), as well as the various automated systems used within Collection Division. The tasks to be performed include but may not be limited to the following:

Percentage of Duties	Essential Functions
40%	Resolves a mixture of routine and complex employer account cases in a timely, progressive, and substantive manner. These cases require initiative, analytical ability, judgment, and investigative skills. Uses various methods and tools to locate individuals and assets. Prepares

	facts, gathers evidence, and applies knowledge of interviewing techniques and methods used by violators to evade tax liability.
20%	Conducts field calls to assist the employer in achieving compliance by providing education and outreach, obtains additional asset and business information in cases where involuntary collection action may be necessary, and secures information from available sources in order to make accurate estimated assessments when warranted.
15%	Works cases that may include multi-entity employers with a recurring history of non-compliance; routine to complex California Unemployment Insurance Code, Section 1733 and 1735 investigation cases; cases involving Section 1128 fraud penalty, assessed liabilities with non-concurrence; and cases involving a mix of routine to complex legal issues, (i.e., third party claims, subordination of liens).
15%	Analyzes financial information; negotiates and considers installment agreements from employers to liquidate delinquent tax liabilities, uses a broad spectrum of collection tools, and effective case management techniques to collect and resolve accounts. Makes adjustments to employer accounts to ensure accuracy of the account information and liability. Process large cash payments received at Field Offices, includes all activities related to processing and securing cash payments and properly applying payments to employer's accounts.
5%	Attends and actively participate in meetings. Participates on special projects in a team environment to improve the quality of service to our customers and foster career growth.
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: Not Applicable - activity does not exist
Lifting: Not Applicable - activity does not exist	Bending/Stooping: Not Applicable - activity does not exist

Other: *Click here to enter text.*

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: May occasionally be required to work at a public counter or assist customers in person.

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.

Civil Service Classification	**Position Number**
Tax Compliance Representative	280-759-8695-xxx

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:

7. HRSD USE ONLY

Classification and Pay Group (CPG) Approval

☒ Duties meet class specification and allocation guidelines. ☐ Exceptional allocation, STD-625 on file.	CPG Analyst Initials	Date Approved
	JMB	8/22/2024

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