Employment Development Department
State of California

☒ Current
☐ Proposed

POSITION STATEMENT

1. POSITION INFORMATION

CIVIL SERVICE CLASSIFICATION:	WORKING TITLE:
Accountant I Specialist	*Accountant I Specialist*
NAME OF INCUMBENT:	POSITION NUMBER:
	280-653-4177-XXX
OFFICE/SECTION/UNIT:	SUPERVISOR'S NAME:
Benefit Services Section/Call Center Unit	
DIVISION:	SUPERVISOR'S CLASSIFICATION:
Integrity and Accounting Division	Sr. Accounting Officer Supervisor
BRANCH:	REVISION DATE:
Unemployment Insurance	5/23/2024

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.)

Must pass a bilingual Spanish fluency exam.

3. DUTIES AND RESPONSIBILITIES OF POSITION

Summary Statement:
(Briefly describe the position's organizational setting and major functions)

Under the direct supervision of the Senior Accounting Officer (Supervisor), the Accountant I performs routine and complex semi-professional accounting work and account maintenance functions related to the Claims Processing and Benefit Payment Control activities that include fraud prevention and detection, establishment of overpayments, employer and claimant assistance and maintenance of employer and claimant accounts to ensure the integrity of the Unemployment Insurance (UI) Trust Fund.

The incumbent makes more difficult monetary eligibility determinations and adjustments as they relate to the various Claims Processing and Benefit Payment control workload processes, and utilizes a variety of databases, analyzes information obtained from a variety of Federal, State and Departmental sources in determining the appropriate action to take as it relates to the Unemployment Insurance (UI) and Disability Insurance (DI) programs.

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The incumbent needs to be flexible and adaptable to frequent workload changes based on organizational workload priorities.

Percentage of Duties	**Essential Functions**
40%	Analyzes and reviews wage information for routine case assignments for accuracy and completeness, identifies irregular wage items and process required wage adjustments, elevates cases where appropriate, makes decisions based on available wage information and through accurate interpretation and application of the information provided, and takes appropriate action. Reviews reporting documents received from employers and claimants to determine monetary eligibility, calculates and processes wage adjustments in the recomputation of UI and DI claims, and establishes UI fraud overpayments due to improper benefit payments.
30%	Researches, follows up, and resolves customer inquiries. Advises customers of changes to the process, investigates missing payments and wage credits to determine if reported information is correct and takes action to update and maintain employer and claimant accounts as needed. Investigates questionable or fraudulent documentation and makes logical determinations based on the information provided. Elevates calls from irate customers.
15%	Trains staff, answers questions. Provides input to management by identifying, documenting, and making recommendations to system and procedural problems. Develops and writes procedures, creates test scenarios and prepares reports as necessary.
10%	Participates on special projects or assignments, working independently or in a team environment, to improve quality services to our customers and to improve processes. Provides feedback to the project leader and manager on a continuous basis regarding status of assignments.

Percentage of Duties	**Marginal Functions**
5%	Performs other duties as assigned.

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

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%
Lifting: Occasionally - activity occurs < 33%	Bending/Stooping: Occasionally - activity occurs < 33%
Other: *Click here to enter text.*	

Type of Environment:

☐ High Rise ☒ Cubicle ☐ Warehouse ☐ Outdoors ☐ Other**:**

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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:

(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:

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:

Supervisor's Signature: Date:

7. HRSD USE ONLY

Classification and Pay Group (CPG) Approval

	CPG Analyst Initials	Date Approved
☒ Duties meet class specification and allocation guidelines.	KV	5/23/2024
☐ Exceptional allocation, STD-625 on file.		

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