Employment Development Department
State of California

☒ Current
☐ Proposed

POSITION STATEMENT

1. POSITION INFORMATION	
CIVIL SERVICE CLASSIFICATION:	WORKING TITLE:
Tax Auditor, EDD	Field Tax Auditor
NAME OF INCUMBENT:	POSITION NUMBER:
Click here to enter text.	280-730-4336-xxx
OFFICE/SECTION/UNIT:	SUPERVISOR'S NAME:
Audit Program Sacramento Area Audit Office Audit Crew	*Click here to enter text.*
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 – _____ 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.)

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 supervision of the Tax Administrator I, the Tax Auditor performs the least to moderately difficult tax audits, investigations, and examinations of employers' books and records for the purpose of determining status and/or liability under the provisions of the California Unemployment Insurance Code (CUIC). Other duties include, but are not limited to participation in Branch and Division sponsored training, advising employers and/or representatives in the application of the CUIC, and preparation for Tax and Benefit Hearings. Incumbents may also be responsible for determining subject wage information in completing Benefit Program assignments; and may serve as a member of an audit team on more difficult audits.

Percentage of Duties	Essential Functions
35%	Conducts the least to moderately difficult audits to difficult investigations. Examines employer books, records and other documents and conducts interviews for the purpose of determining employment status and/or tax liability under the provisions of the CUIC. Applies Department policies and procedures as stated in Employment Tax Notices, Field Audit and Compliance Notices, the Audit Procedure Handbook, and other informational publications and resources.

	Makes detailed analysis of entities, business operations and accounting records, types of services performed and the status of the services under the CUIC.
35%	Analyzes employer books, records, and documents for all needed information to complete an audit. Conducts entrance and exit interviews with employers and their designated representatives. Prepares detailed, organized, and accurate audit reports which will support the audit findings and recommendations for tax assessments. Uses all automated programs utilized by Department employees, including but not limited to, the Accounting and Compliance Enterprise System, Single Client Database, Franchise Tax Board, Secretary of State, Department of Motor Vehicles, State Contractors Licensing Board, Email, and more. Travel and work away from the office is required. May also be required to travel overnight or out of state to conduct audits involving employers with less than 250 employees but greater than 100 employees. May be required to work in an outstation setting which requires a higher level of independence and self-motivation.
15%	Investigates and completes assigned obstructed claims investigations to determine the employment status and wage credits of claimants. Prepares detailed and accurate investigation reports in support of their investigation findings and recommendations.
10%	Prepares cases for formal hearings, obtains necessary witnesses and develops evidence; assists in presenting the case for the Department. Advises employers and/or their representatives in the application of the CUIC and Department procedures.
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: *Click here to enter text.*

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

Civil Service Classification	Position Number
Tax Auditor, EDD	280-730-4336-xxx

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:

7. HRSD USE ONLY

Classification and Pay Unit (CPU) Approval

	CPU Analyst Initials	Date Approved
☒ Duties meet class specification and allocation guidelines. ☐ 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

Employment Development Department
State of California

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POSITION STATEMENT

1. POSITION INFORMATION	
CIVIL SERVICE CLASSIFICATION:	WORKING TITLE:
Associate Tax Auditor	Associate Tax Auditor
NAME OF INCUMBENT:	POSITION NUMBER:
Click here to enter text.	280-730-4339-xxx
OFFICE/SECTION/UNIT:	SUPERVISOR'S NAME:
Audit Program Sacramento Area Audit Office Audit Crews	*Click here to enter text.*
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 – _____ hours

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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 the Tax Administrator I, the Associate Tax Auditor (ATA) conducts highly difficult and complex audits and investigations of employer accounts with status issues and computerized accounting systems. The ATA serves as the Department's audit and compliance representative in an out-stationed office, or in a headquarters setting; develops guidelines, training courses, and formulates policy and procedures to assist management in the administration of the Employment Tax Program.

Percentage of Duties	Essential Functions
40%	Performs highly difficult and complex audits and investigations on all types of business entities of a highly technical and complex nature. Makes employment status determinations involving both common law and statutory law and is proficient in cases involving sensitive industry issues and entity issues that require account consolidations. Must be familiar with relevant court cases, California Unemployment Insurance Appeals Board decisions, related regulations and Department policies and procedures. Must be able to interpret and apply the California Unemployment Insurance Code when addressing assignments involving vertical unity of

	enterprise (i.e., continuity of control during acquisition or organizational changes of a business entity), underground economy leads, ruling letters, and the liability of employers located outside of California.
35%	Analyzes employer books, records, and other documents for all needed information. Conducts entrance and exit interviews with employers and their representatives, and prepares detailed and accurate audit reports and related recommendations which support the audit findings and tax assessments. Uses all automated programs utilized by the Department including: Email, Single Client Data Base, Franchise Tax Board data base, Accounting and Compliance Enterprise System, Department of Motor Vehicle access, Contractors Licensing Board, and Secretary of State access. Travel and work away from the office is required. May also be required to travel overnight or out of state to conduct audits involving employers with less than 250 employees but greater than 100 employees. May be required to work in an outstation setting which requires a higher level of independence and self-motivation.
10%	Prepares petitioned cases for hearings including interviewing and subpoenaing witnesses. Conducts benefit hearings on their own obstructed (OB) claim petitions and may assist a Staff Tax Auditor (STA) with tax hearing representation or conduct tax hearings where the issues are less complex and/or when the STA Hearing Officer has a conflict with other hearing assignments. An ATA assigned to an outstationed office may also independently conduct tax hearings. May act as lead auditor in conducting more difficult audits. Assists in training new auditors.
10%	Investigates and completes assigned OB claim investigations to determine the employment status and wage credits of claimants. Prepares detailed and accurate investigation reports in support of their findings and recommendations. Makes customized presentations to business organizations or tax professionals on payroll tax topics and the Department's e-Services for Business. Participates in outreach activities to ensure that industry groups have the information to properly report taxes.
Percentage of Duties	**Marginal Functions**
5%	Performs other duties as assigned.

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

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Civil Service Classification	Position Number
Associate Tax Auditor	280-730-4339-xxx

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5. SUPERVISION EXERCISED:

(List total per each classification of staff)

None, may act as lead.

6. SIGNATURES

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