

POSITION STATEMENT

1. POSITION INFORMATION	
CIVIL SERVICE CLASSIFICATION:	WORKING TITLE:
Senior Tax Compliance Representative	Tax Technical and Project Specialist
NAME OF INCUMBENT:	POSITION NUMBER:
<i>Click here to enter text.</i>	280-620-8687-xxx
OFFICE/SECTION/UNIT:	SUPERVISOR'S NAME:
Technology Management Section Projects & Application Support Group	Kimberly Bucchioni
DIVISION:	SUPERVISOR'S CLASSIFICATION:
Tax Support	Tax Administrator I, EDD
BRANCH:	REVISION DATE:
Tax	4/25/2026
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.)	
Minimal travel may be required for training and meetings; working in other locations may be required.	
3. DUTIES AND RESPONSIBILITIES OF POSITION	
Summary Statement: (Briefly describe the position's organizational setting and major functions)	
Under general supervision of the Projects & Application Support Group Manager, Tax Administrator I, the Senior Tax Compliance Representative acts as the Tax Technical and Project Specialist and is responsible for independently serving as an expert tax compliance resource. The incumbent demonstrates a high degree of judgement with extensive tax program or technical knowledge to assure adherence to the California Unemployment Insurance Code (CUIC), Code of Regulations, Policies, or Standards to lead or provide project oversight on Information Technology (IT)-related projects. The incumbent utilizes project management methodologies, as defined by Tax Branch or the IT Branch (ITB). The incumbent will be required to develop material utilizing web applications for tax-related information to be utilized by the Branch on Tax Branch's intranet website on SharePoint. The incumbent will serve as a subject matter expert and provide tax expertise in the full range of service and support for Tax Branch databases, systems, and applications, such as the Infolmage application's Tax Domain. The incumbent will serve as a systems and technical support liaison performing the most complex and independent analytical support functions for the Infolmage application's Tax Domain. Infolmage provides long term storage, work queues, and access to documents submitted by the customers across the Department.	

Percentage of Duties	Essential Functions
30%	Acts as a Project Lead serving as the tax expert compliance resource on a variety of the most complex project and application support assignments, such as system enhancements, application upgrades, or new system implementations impacting the Tax Branch. Provides complex analysis and critical support to the Tax Branch and the ITB on IT projects, such as planning, budgeting, scheduling, and economic analysis. Participates in the development of business objectives, functional business requirements, testing, and implementation to ensure the Tax Branch's program needs are met. Prepares project documentation, artifacts, deliverables, and updates, as needed, for project sponsor, steering committee, and other interested parties.
30%	Acts as a liaison between program area and the ITB for problem resolution, maintenance and enhancements, internal and external data requests through the IT Work Intake Process. Serves as a compliance expert liaison and facilitator with Tax Branch on all IT infrastructure, projects, hardware- and software-related services and activities. Develops material utilizing web applications for tax-related information to be utilized by the Branch on Tax Branch's intranet website on SharePoint. Leads regular reviews of content management, as it relates to tax technical information on SharePoint and Sharefolders, including tax and benefit information related to the CUIC.
20%	Utilizes knowledge of Tax compliance and accounting functions to perform the most complex and independent analytical support functions for the Tax document workflow and archive system within the Infolmage application's Tax Domain. Establishes and maintains user's profiles/access to the Infolmage application and its associated reporting tool, Tax Infolmage Reports, in order for Tax Branch to be able to meet program objectives, complete workloads supporting Tax's internal and external customers, and ensure oversight of program data integrity. Responds to user requests via phone or email to troubleshoot access problems (i.e. help users gain access to the necessary documents they wish to view). Makes recommendations to management, when appropriate, regarding issues with data within Infolmage.
15%	Facilitates the development and testing of new Tax business processes; assists technical leads, business users, and the Infolmage Business Administrator with the analytical review of existing business processes, development of business rules, and process flows to achieve results within the Infolmage system. Assists technical leads, business users, and the Infolmage Business Administrators in developing and providing user procedures; facilitates one-on-one and classroom training, as needed. Acts as a liaison between Tax Branch and the Administration Branch's Document & Information Management Center, in regards to Tax document and remittance scanning and processing issues. Acts as liaison between business users and IT staff by providing Infolmage program and administrative support functions.
Percentage of Duties	Marginal Functions
5%	Performs other duties as assigned.
4. WORK ENVIRONMENT <i>(Choose all that apply)</i>	
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%

Civil Service Classification
Senior Tax Compliance Representative

Position Number
280-620-8687-xxx

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:

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:

7. HRSD USE ONLY

Classification & Pay (CPG) Approval

☒ Duties meet class specification and allocation guidelines.	CPG Analyst Initials	Date Approved
☐ Exceptional allocation, STD-625 on file.	JMB	10/14/2026

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