Employment Development Department
State of California

☒ Current
☐ Proposed

POSITION STATEMENT

1. POSITION INFORMATION	
CIVIL SERVICE CLASSIFICATION:	WORKING TITLE:
Senior Tax Compliance Representative (Specialist)	*Senior Tax Compliance Representative (Specialist)*
NAME OF INCUMBENT:	POSITION NUMBER:
	604-8687-XXX
SECTION/UNIT:	SUPERVISOR'S NAME:
Electronic Data Integrity Section (EDIS)/e-File Group (EFG)	
DIVISION:	SUPERVISOR'S CLASSIFICATION:
Tax Processing and Accounting Division	Tax Administrator I, EDD
BRANCH:	REVISION DATE:
Tax	
Duties Based on: ☒ Full Time ☐ Part Time – Fraction _____ ☐ 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.)*:

Click here to enter text.

3. DUTIES AND RESPONSIBILITIES OF POSITION

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

Under the general supervision of a Tax Administrator I, the Senior Tax Compliance Representative (STCR) Specialist performs the most complex, difficult and sensitive tax compliance assignments in the e-File Group. The STCR serves in a lead capacity and independently handles the most complex, difficult, and sensitive tax cases. They apply the provisions of the California Unemployment Insurance Code (CUIC) in reviewing employer tax submissions, ensuring compliance with Departmental regulations, policies, and procedures. This includes the review of electronically submitted New Employee Registry (NER), Independent Contractor Reporting (ICR) and Quarterly Contribution Return and Report of Wage data.

In addition, the STCR monitors the performance of the electronic applications and the workflows, provides training to staff and review staff work. The incumbent responds to the most complex and technical questions from staff, employers, businesses, payroll agents and government entities regarding e-Services for business, NER, ICR, and wage and witholding data.

The STCR utilizes various systems, such as the Accounting and Compliance Enterprise System (ACES), Time Share Option (TSO), Batch Reconciliation and Statistics (BRS) application, Management Interface (MI), NER and ICR databases and InfoImage to perform their daily assignments, including employer tax account maintenance, collection of delinquent tax and wage reporting forms and accuracy of forms submitted in accordance with the NER and ICR regulated process.

Civil Service Classification **Position Number**
Senior Tax Compliance Representative (Specialist) 604-8687-XXX

Percentage of Duties	Essential Functions
40%	As a subject matter expert in the processing of electronically submitted NER, ICR, and Quarterly Contribution Return and Report of Wage data requiring extensive knowledge of the CUIC, Department regulations, policies, and procedures. • Monitors the daily operation of the NER, ICR and the wage and withholding electronic filing programs to ensure that all of the electronic data files are processed and reconciled in an efficient, timely and accurate manner in compliance with the regulations set by the CUIC, Departmental policy and procedures. • Monitors and balances transactions and produces daily statistical reports for the NER, ICR and the wage and withholding programs reported through the various electronic filing programs. • Provides assistance to internal and external customers for issues relating to the electronic filing of the NER, ICR and the wage and withholding data. • Initiates employer and/or agent contacts for the resolution of the most complex, difficult and sensitive issues, including the collection of delinquent tax forms to ensure customers are in compliance with the requirements established by the CUIC. • Enforces and performs compliance activities which include notifications and follow up activities for electronic filers. • Ensures that customer inquiries through correspondence, email and telephone calls are responded to in a timely, accurate and clear manner. • Reviews, analyzes and makes necessary corrections to inaccuracies in employer's files, which may include the record format and/or employer/employee reported information for accuracy in accordance with Departmental policy. • Prepares correspondence to inform businesses, employers and/or agents of errors found, corrections made for successful processing of their electronic file and/or correction and resubmission needed.
25%	• Downloads files from the ACES directories for processing. • Logs files into the appropriate Access inventory database. • Transmits completed files to the mainframe. • Balances transactions and prepares the daily statistical reports regarding payments. • Monitors the performance of e-Services for Business, ACES, NER and ICR for system anomalies and initiates service calls when required to ensure system availability does not impact customer functions for voluntary compliance. • Reports significant processing incidents impacting employer availability to maintain voluntary compliance to Tax Administrator. • Submits modification and system enhancement requests to ACES Incident Report SPOCs.
20%	To assist employers in complying with tax laws and regulations: • Particpates in the development, implementation and maintenance of taxpayer outreach strategies to educate, register customers in the eServices for Business online service encouraging and promoting to our internal and external customers the ability to manage their payroll tax accounts ensuring voluntary compliance, which includes the reporting of NER, ICR, and wage and withholding data electronically. • Partners with the EDIS marketing SPOC, other EDD divisions, outside agencies, payroll agents and/or vendors for taxpayer outreach and education purposes. • Participates in conferences, tax seminars, workshops and/or presentations representing the department with marketing the electronic filing options available to employers and agents to file required tax forms in compliance with statutes established by the CUIC.

10%	• Updates and maintains the Electronic Filing Guides for NER, ICR and the quarterly wage and withholding, related forms and publications, marketing material, Intranet/Internet information, FAQ's and desk procedures. • Participates in special projects involving electronic reporting methods. • Makes changes to processes and procedures based on changes in policy, regulation and/or legislation, as necessary. • Ensures that all procedures and flow processes are maintained and updated for the processing of the NER, ICR and wage and withholding data through various electronic reporting options. • Provides training to staff and presentations on the group's functions and workflows.
Percentage of Duties	**Marginal Functions**
5%	Perfom 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**:**

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

Supervision Exercised*:*

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 & Pay Group (CPG) Approval

Civil Service Classification	**Position Number**
Senior Tax Compliance Representative (Specialist)	604-8687-XXX

☒ Duties meet class specification and allocation guidelines. ☐ Exceptional allocation, 625 on file.	CPG Analyst initials	Date approved
	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