Employment Development Department
State of California

☒ Current
☐ Proposed

POSITION STATEMENT

1. POSITION INFORMATION	
CIVIL SERVICE CLASSIFICATION:	WORKING TITLE:
Tax Administrator II, EDD	Office of Taxpayer Rights Advocate, Chief
NAME OF INCUMBENT:	POSITION NUMBER:
Shondala Thomas	280-620-4333-010
OFFICE/SECTION/UNIT:	SUPERVISOR'S NAME:
Tax Advocate Bureau	Randall Ginise
DIVISION:	SUPERVISOR'S CLASSIFICATION:
Tax Support	Tax Administrator III, EDD
BRANCH:	REVISION DATE:
Tax	4/16/2026

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.)

Travel may be required for meetings or training.

3. DUTIES AND RESPONSIBILITIES OF POSITION

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

Under the general direction of the Taxpayer Advocate Bureau Chief, Tax Administrator III, the incumbent is directly responsible for planning, organizing and directing the activities of the Taxpayer Advocate Office, Settlements Group and the Publications and Marketing Services Group. Responsibilities include but not limited to recruitment and selection of staff; fosters staff development, identifies training resources, encourages staff to participate in teambuilding exercises; and approves/denies leave request, evaluates staff performance.

Percentage of Duties	Essential Functions
35%	Responsible for directly overseeing the recruitment and selection of staff; fosters staff development, identifies training resources, encourages staff to participate in teambuilding exercises; approves/denies leave request, evaluates staff performance, and if warranted takes disciplinary action as necessary. Reviews staff workload to ensure assignments are complete deadlines are met, and performance goals are achieved.

25%	Provides oversight to the section and ensures the resolution of the more sensitive and complex taxpayer and claimant complaints in accordance with laws, regulations, policies and equitable standards and, when appropriate, educates the employer on the appropriate laws, rules and regulations to facilitate voluntary compliance. Provides guidance and direction on sensitive and complex written responses to controlled correspondence, ensuring the quality, timeliness and coordinating resolution with the Tax Branch program area, the Governor's Office, elected officials, government agencies, taxpayers or their representatives and claimants. Identifies and resolves the most significant and sensitive issues relating to system and procedural problems and works with management to resolve such issues.
25%	Provides oversight to the Settlements Office and ensures the quality, timeliness and coordination of settlement recommendations with impacted Tax Branch program management and the Department's Legal Office. In accordance with Employment Tax Notice 08-01, reviews and approves settlement offers where the reduction of tax and penalty do not exceed the amount specified in section 1236(a)(3)(A) of the California Unemployment Insurance Code (CUIC). Provides recommendations to the Attorney General's Office for settlement offers where the reduction of tax and penalty exceeds the amount specified in section1236(a)(3)(A) of the CUIC.
10%	Oversee the outreach efforts of staff intended to promote voluntary compliance and education of employers including the Tax Branch sponsored Small Business Employer Advisory Committee. Consults with Tax Branch management, other governmental agencies, elected officials, private payroll agents and other employer organizations regarding Tax Branch website content, forms, publications, programs, policies and procedures. Provides high-level expertise to the Tax Branch Deputy Director on taxpayer issues and recommends changes to Tax Branch policies and procedures.
Percentage of Duties	**Marginal Functions**
5%	Performs other duties as assigned.

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

Standing: Frequently - activity occurs 33% to 66%	Sitting: Frequently - activity occurs 33% to 66%
Walking: Frequently - activity occurs 33% to 66%	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:

5. SUPERVISION EXERCISED:
(List total per each classification of staff)

Directly - 3 Tax Administrator Is

Civil Service Classification	Position Number
Tax Administrator II, EDD	280-620-4333-010

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 (C&P) Approval

	C&P Analyst Initials	Date Approved
☒ Duties meet class specifications and allocation guidelines.	JMB	4/16/2026
☐ Exceptional allocation, STD-625 on file.		

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:

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