Employment Development Department
State of California

☒ Current
☐ Proposed

POSITION STATEMENT

1. POSITION INFORMATION	
CIVIL SERVICE CLASSIFICATION:	WORKING TITLE:
Tax Compliance Representative	*Tax Compliance Representative*
NAME OF INCUMBENT:	POSITION NUMBER:
	280-642-8695-xxx
OFFICE/SECTION/UNIT:	SUPERVISOR'S NAME:
Reimbursable Accounting Group	
DIVISION:	SUPERVISOR'S CLASSIFICATION:
Tax Processing and Accounting Division	Tax Administrator I
BRANCH:	REVISION DATE:
Tax	9/14/2020

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.)

3. DUTIES AND RESPONSIBILITIES OF POSITION

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

Under the close supervision of a Tax Administrator I, the Tax Compliance Representative (TCR) in the Tax Processing and Accounting Division's (TPAD), Reimbursable Accounting Group (RAG), performs a mixture of routine to more complex, difficult, and sensitive assignments involving Unemployment Insurance (UI) benefit claims and payment issues resulting from erroneous benefit payments and system failures. The TCR uses good judgment and knowledge of the California Unemployment Insurance Code (CUIC), the US Department of Labor Employment Training Handbook (ETH), and complies with Departmental regulations, rules, policies and procedures to resolve the benefit charges issues impacting Reimbursable, Tax Rated, or Combined Wage accounts and the UI benefit charges made to determine if charges were made correctly, or if a manual proration is required. The TCR is also responsible for the timely generation of various reports specific to Reimbursable and/or Combined Wage UI claims for upper management and various organizations within Tax Branch, Administration Branch, and the US Department of Labor.

Civil Service Classification
Tax Compliance Representative

Position Number
280-642-8695-xxx

Percentage of Duties	Essential Functions
45%	• Investigates, analyzes, identifies, and takes appropriate action when conducting adjusting entries to reflect the correct charges to a UI claim or employer account on the Single Client Data Base (SCDB) or the Accounting and Compliance Enterprise System (ACES). • Responds to employer correspondence and telephone inquiries regarding employer accounts and analyzes inquiries related the status of UI claims, liabilities on Reimbursable accounts, and the collection of reimbursable benefit charges. • Access the ACES, SCDB, Billing and Chargeback System and InfoImage to analyze and determine why the employer is protesting their quarterly UI charges and or determine the validity of benefit charges. • Contacts other State agencies to explain and collect payments on outstanding account liabilities.
35%	• Reconciles any discrepancies in the Unemployment Insurance (UI) benefit claims activities resulting from system Failed Prorations and/or Code 26. • Reconciles and posts adjustments, including penalties applicable per the CUIC relating to Reimbursable employers; initiates requests for employer refunds; and maintains accurate records of actions taken in each case.
15%	• Answers questions on sub-unit's functions, responsibilities, and continued compliance with the CUIC resulting from modifications to the SCDB, changes to Departmental regulations, policies and procedures, legislation, technological advancements or new programs. • Assists in the preparation of various fiscal reports for management, for the Fiscal Programs Division of the Administration Branch, and other departmental areas. • Authorize Fiscal Programs Division to electronically transfer funds to other states for California's share of claimants' UI charges. • Prepares weekly and monthly inventory and production reports.

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:

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:

Civil Service Classification	**Position Number**
Tax Compliance Representative	280-642-8695-xxx

5. SUPERVISION EXERCISED:

(List total per each classification of staff)

Click here to enter text.

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

Personnel Management Group (PMG) Approval

	PMG Analyst Initials	Date Approved
☒ Duties meet class specification and allocation guidelines. ☐ Exceptional allocation, STD-625 on file.	JL	9/14/2020

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