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:
Click here to enter text.	280-642-8695-xxx
OFFICE/SECTION/UNIT:	SUPERVISOR'S NAME:
Benefit and Rate Section Rate Management Group	Stacy Vierra
DIVISION:	SUPERVISOR'S CLASSIFICATION:
Tax Processing and Accounting	Tax Administrator I, EDD
BRANCH:	REVISION DATE:
Tax	4/17/2025

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.)

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 close supervision of the Tax Administrator I, the Tax Compliance Representative (TCR) in the Tax Processing and Accounting Division's, Rate Management Group (RMG), performs a mixture of routine, complex, difficult, and sensitive compliance functions pertaining to Division 1, Part 1, Chapter 4, Articles 3, 4, and 5 of the California Unemployment Insurance Code (CUIC) as it applies to the maintenance and transfers of the Unemployment Insurance (UI) Reserve accounts as well as answering employers' protests to their UI tax rate as required by Sections 1034 and 1035 of the CUIC. Use of good judgment and knowledge of the CUIC, Title 22 of the California Code of Regulations, precedent decisions of the California Unemployment Insurance Appeals Board (CUIAB), Department regulations, applicable statutes, rules and policies is required to properly, within statutory authority, analyze and process the UI Reserve account transfers, rate correspondence from internal/external customers, and protests to employers' UI rates. Processing these requests involves contact with the employer or the employer's representative by telephone or in writing. The RMG administers the annual program that ensures that employers are assigned the correct UI tax rate, and the TCR may be asked to assist with this process. The TCR also participates on special assignments/projects.

Civil Service Classification
Tax Compliance Representative

Position Number
280-642-8695-xxx

Percentage of Duties	Essential Functions
35%	Administers UI tax rate program: • Verifies the accuracy of UI contributions and wages in the Accounting and Compliance Enterprise System (ACES) and makes any necessary adjustments to the UI Reserve account for the rate and reserve charges to occur correctly and to ensure the employer receives the correct UI Rate before a reserve account transfer is processed. • Determines taxable wages and paid contributions in collaboration with the Audit Program to ensure the UI rate transfer is processed correctly. • Reviews UI Reserve Account Transfer requests to make determinations concerning benefit charges and transfers of reserve accounts for multiple accounts and multiple years based on established guidelines by the CUIC, and based on transfer ratio when multiple accounts are involved. • Processes UI rate-related work items referred by Tax Branch organizations or system-generated work items requiring a UI rate review, recalculation of UI rate, or a complete re-rating, ensuring employers are charged at the appropriate rate in alignment with the CUIC.
35%	Assists employers in maintaining compliance with the CUIC and applicable tax laws: • Analyzes and evaluates employers' protests to computations of reserve account balances and makes determinations based on findings of research conducted. • Ensures employers are educated of their administrative rights as required by Section 1222 of the CUIC and issues determination letters to notify them of the Department's determination of their protest. • Analyzes and processes correspondence regarding UI rates, reserve account transfers, and determinations on rate protests from internal and external customers. • Communicates effectively with employers, their agents, and other Department staff to provide technical assistance regarding the effect of employer account reinstatements on UI reserve accounts and UI tax rates.
15%	Reviews and processes partial/complete UI Reserve Account Transfer requests: • Initiated by the employer and/or the Audit Program within the Tax Branch ensuring compliance with the criteria set forth by Division 1, Part 1, Chapter 4, Article 5 of the CUIC. • Involving Horizontal Unity of Enterprise cases, Motion Picture Payroll Services Company transfer, and Predecessor-Successor. • For duplicate, split-offs and complex cases to re-compute reserve account balances, ratios, and UI tax rates when two or more employers are erroneously filing as a single employer and to ensure the UI tax rates for entities in question are accurate. • Denies requests for UI Reserve Account Transfers when they fail to meet the established criteria for transfer. • Communicates effectively with employers, their agents, and other Department staff to provide technical assistance and information relating to the transfer and effects of the reserve accounts and UI tax rates ensuring employers and staff are educated on Departmental regulations and in compliance with the CUIC.

10%	• Assists lead trainers by providing on-the-job training for new or less-experienced staff; ensures staff follow all Departmental policies, procedures, guidelines, and legal authorities ensuring compliance with all tax regulations. • Reviews technical procedures, standard letters and forms, and revises or develops letters and forms as needed. • Assists with the Department Notice for the Annual Rating process to ensure employers are charged the correct UI tax rate. This includes the preparation of Incident Reports, reviewing and validating all required reports in ACES, and participating in the review and validation of the accounts used as part of the rating test sample. • Assist other program areas and/or EDD Branches as needed and participates in special projects and assignments.
Percentage of Duties	**Marginal Functions**
5%	Performs other duties as assigned.

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

Standing: Occasionally - activity occurs < 33%	Sitting: Occasionally - activity occurs < 33%
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:*Click here to enter text.*

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:

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

7. HRSD USE ONLY		
Personnel Management Group (PMG) Approval		
☒ Duties meet class specification and allocation guidelines. ☐ Exceptional allocation, STD-625 on file.	C&P Analyst Initials JMB	Date Approved 4/23/2025
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