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 Contribution Rate Group/Units 1, 2 & 3	*Click here to enter text.*
DIVISION:	SUPERVISOR'S CLASSIFICATION:
Tax Processing and Accounting	Tax Administrator I, EDD
BRANCH:	REVISION DATE:
Tax	9/5/2025

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 a Tax Administrator I, the Tax Compliance Representative (TCR) in the Tax Processing and Accounting Division's, Contribution Rate Group, performs a mixture of routine to more complex, difficult, and sensitive assignments in the processing of employer protests to the Statement of Charges to Reserve Account, DE 428T, and employers' petitions to the Department's determination to their Unemployment Insurance (UI) benefit charges. The TCR uses good judgment and knowledge of the California Unemployment Insurance Code (CUIC), Title 22 of the California Code of Regulations (CCR), precedent decisions of the California Unemployment Insurance Appeals Board (CUIAB), Department's policies, and procedures in addressing and responding to the benefit charge protests, and petitions, representing the Department in Administrative Law Judge (ALJ) hearings and making necessary updates/adjustments to the Department's Accounting and Compliance Enterprise System (ACES), Single Client Data Base (SCDB), and InfoImage.

The TCR is proficient in a full range of tasks performed within the group and based on the degree of experience, may function as trainer for less-experienced employees and participate in special projects.

Civil Service Classification
Tax Compliance Representative

Position Number
280-642-8695-xxx

Percentage of Duties	Essential Functions
45%	Benefit Charge Protests/Petitions/Hearings • Processes employer protests to the *Statement of Charges to the Reserve Account* (DE 428T). • Resolves a mixture of routine and more complex and sensitive protests to Unemployment Insurance (UI) benefit charges. • Makes determinations to allow or disallow the employer protest to the UI benefit charges by analyzing UI field office records, employer records in ACES and claim records in SCDB to determine the validity of the employer protests in accordance with the provisions of the CUIC, CCR Title 22, precedent decisions of the CUIAB, and Department regulations, policies, and procedures. • Benefit protest assignments may include employer and agent protests that have a higher volume of UI claims with simple to complex issues including re-computation claims, multiple-employer claims, and state or federal extension claims, potential fraudulent benefit claims, and identifying potential overpayments for incorrectly paid benefits charged to an employer and establishing the refund process of the identified overpayments. • Prepares protest determination letters notifying the employer of the Department's determination and their appeal rights. • Analyzes UI Field Office, employer, and claimant records to properly respond to and address employer petitions for review. • Applies Department regulations, policies, procedures, and sections of the CUIC and CCR Title 22 that are pertinent to each petition. • Researches applicable Precedent Decisions, the Field Office Manual, the Tax Status Guide, the Benefit Determination Guide, the Audit Procedures Handbook, and the Petitions and Hearings Handbook for specific information related to the case being reviewed. • Responds to employer petitions by preparing the Department's answer to petition, including a statement of all known facts, and the Department's position based on the analysis of facts, citations of relevant legal authorities, Precedent Decisions, sections of the CUIC, and CCR Title 22. • Reviews cases and prepares exhibits for administrative hearings. • Represents the Department at administrative hearings before an ALJ of the CUIAB to respond to the employer's petition to the Department's determination regarding the UI Benefit Charges Protest. • Presents the Department's position, including making opening statements, submitting exhibits into evidence, stipulating to facts, cross-examining witnesses, arguing points of law and statutes, agreeing to negotiated settlements, and making closing or summary statements.
25%	Additional Tasks Related to Benefit Charge Protests/Petitions/Hearings • Conducts adjustments to relieve charges to the employer's reserve account when the protest/petition is granted; enters or corrects the SCDB online flag to prevent the allocation of future charges. • Processes the list of referrals to NorCal/SoCal Authorization Centers regarding protest cases that need follow-up actions from these offices. • Ensures voluntary compliance with the CUIC by contacting employer and/or employer agents regarding their benefit charge protests/petitions.
25%	Other Critical Tasks • Processes ALJ Decisions to determine if the UI benefit charges need to be removed and makes the necessary adjustments to the employer's reserve account. • Responds to telephone inquiries from internal and external customers regarding the UI benefit charges and the effects of these charges to employers' reserve accounts and UI tax rates. • Prepares correcting documents, correspondence, identifies overpayments, establishes the refund process, and completes adjustments in ACES and/or the SCDB resulting from, but not limited to, ALJ decisions concerning benefit charge petitions. • Trains new employees and participates on special assignments. • Assists other program areas and/or other EDD branches as needed.

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	Note: The most complex cases may be referred to a Senior Tax Compliance Representative.
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:*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:

7. HRSD USE ONLY

Classification & Pay Group (C&P) Approval

☒ Duties meet class specification and allocation guidelines.	C&P Analyst Initials	Date Approved
☐ Exceptional allocation, STD-625 on file.	JMB	*5/29/2026*

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.

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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