Employment Development Department
State of California

☒ Current
☐ Proposed

# POSITION STATEMENT

| 1. POSITION INFORMATION | |
|---|---|
| CIVIL SERVICE CLASSIFICATION: | WORKING TITLE: |
| Program Technician II | *Program Technician II* |
| NAME OF INCUMBENT: | POSITION NUMBER: |
| *Click here to enter text.* | 280-785-9928-xxx |
| OFFICE/SECTION/UNIT: | SUPERVISOR'S NAME: |
| Taxpayer Assistance Center | *Click here to enter text.* |
| DIVISION: | SUPERVISOR'S CLASSIFICATION: |
| Tax Processing and Accounting | Tax Administrator I, EDD |
| BRANCH: | REVISION DATE: |
| Tax | 10/21/2024 |

**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 general supervision of a Tax Administrator I, the incumbent performs journey-level Employment Tax Program duties and is responsible for the more difficult, complex, and sensitive assignments relating to customer service and tax enforcement activities. Provides assistance on the more complex inquiries to customers who contact the call center for assistance. Advisory topics include the employment tax portions of the California Unemployment Insurance Code; employer registration and account status changes, reporting requirements and procedures; explanations of Department correspondence, forms and brochures; explanations of reserve account questions; and assistance with questions about employment tax rates. Assists employers and their agents in learning how to compute taxes and prepare various reporting forms.

| Percentage of Duties | Essential Functions |
|---|---|
| 45% | **Telephone Advisories**<br>The incumbent is responsible for the more difficult, complex, and sensitive assignments relating to customer service and tax enforcement activities. In a journey level capacity, the incumbent provides assistance on the more complex inquiries to customers who contact the call center for assistance. Advisory topics include the employment tax portions of the |

| | |
|---|---|
| | California Unemployment Insurance Code; employer registration and account status changes, reporting requirements and procedures; explanations of reserve account questions; and assistance with questions about employment tax rates. |
| 40% | Assists employers and their agents in learning how to compute taxes, prepare various reporting formsand explanations of Department correspondence, forms and brochures.<br><br>While staff are expected to handle a full range of call issues as noted above, those that are most complex and sensitive are referred to Tax Compliance Representative staff. |
| 10% | **Delinquency Correspondence**<br>Processes batches of delinquency correspondence. This involves determining if various filing forms are still delinquent, updating information on the Accounting and Compliance Enterprise System, making timeliness and good cause determination for delinquent filings, and inactivating accounts that are no longer in business. Monetary adjustments, within the authorized limits for this staff classification, will be made by staff in order to correct the account.<br><br>The most complex work items and those involving adjustments beyond their scope and authority are referred to TCR level staff. |
| **Percentage of Duties** | **Marginal Functions** |
| 5% | Performs other duties as assigned. |

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

| | |
|---|---|
| Standing: Occasionally - activity occurs < 33% | Sitting: Continuously - activity occurs > 66% |
| Walking: Occasionally - activity occurs < 33% | Temperature: Temperature Controlled Office Environment |
| Lighting: Artificial Lighting | Pushing/Pulling: Not Applicable - activity does not exist |
| 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:

| **Civil Service Classification** | **Position Number** |
|---|---|
| Program Technician II | 280-785-9928-xxx |

| **Supervisor's Statement:**<br>*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** | | |
| **Personnel Management Group (C&PG) Approval** | | |
| ☒ Duties meet class specification and allocation guidelines.<br>☐ Exceptional allocation, STD-625 on file. | C&PG Analyst Initials<br>nsw | Date Approved<br>11/13/2025 |

**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

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# POSITION STATEMENT

| 1. POSITION INFORMATION | |
|---|---|
| CIVIL SERVICE CLASSIFICATION: | WORKING TITLE: |
| Program Technician | *Program Technician* |
| NAME OF INCUMBENT: | POSITION NUMBER: |
| *Click here to enter text.* | 280-785-9927-xxx |
| OFFICE/SECTION/UNIT: | SUPERVISOR'S NAME: |
| Taxpayer Assistance Center | *Click here to enter text.* |
| DIVISION: | SUPERVISOR'S CLASSIFICATION: |
| Tax Processing and Accounting | Tax Administrator I, EDD |
| BRANCH: | REVISION DATE: |
| Tax | 10/21/2024 |

**Duties Based on:** ☐ FT ☐ PT– Fraction _____ ☐ INT ☐ Temporary – _____ hours

## 2. REQUIREMENTS OF POSITION

**Check all that apply:**

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☐ 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 incumbent in a training capacity, performs the less difficult semi-technical Employment Tax Program duties.

| Percentage of Duties | Essential Functions |
|---|---|
| 45% | **Telephone Advisories**<br>In a training capacity, the incumbent provides assistance on the less difficult inquiries to customers who contact the call center for assistance. Advisory topics include the employment tax portions of the California Unemployment Insurance Code; employer registration and account status changes, reporting requirements and procedures; explanations of reserve account questions; and assistance with questions about employment tax rates. |

| | |
|---|---|
| 40% | Assists employers and their agents in learning how to compute taxes, prepare various reporting formsand explanations of Department correspondence, forms and brochures.<br><br>More complex calls are referred to Program Technician (PT) II staff or Tax Compliance Representative staff. |
| 10% | **Delinquency Correspondence**<br>Processes batches of delinquency correspondence. This involves determining if various filing forms are still delinquent, updating information on the Accounting and Compliance Enterprise System, making timeliness and good cause determination for delinquent filings, and inactivating accounts that are no longer in business. In some instances monetary adjustments, within the authorized limits for this staff classification, will be made by staff in order to correct the account.<br><br>More complex work items and those involving adjustments beyond their scope and authority are referred to PT II or TCR level staff. |
| **Percentage of Duties** | **Marginal Functions** |
| 5% | Performs other duties as assigned. |

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

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| Standing: Occasionally - activity occurs < 33% | Sitting: Continuously - activity occurs > 66% |
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☐ Other:*Click here to enter text.*

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(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.*

| Civil Service Classification | Position Number |
|---|---|
| Program Technician | 280-785-9927-xxx |

| | | |
|---|---|---|
| Supervisor's Name: *Click here to enter text.* | | |
| Supervisor's Signature: Date: | | |
| **7. HRSD USE ONLY** | | |
| **Personnel Management Group (C&PG) Approval** | | |
| ☒ Duties meet class specification and allocation guidelines.<br>☐ Exceptional allocation, STD-625 on file. | C&PG Analyst Initials<br>JMB | Date Approved<br>10/23/2024 |

**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