

POSITION STATEMENT

1. POSITION INFORMATION

CIVIL SERVICE CLASSIFICATION:	WORKING TITLE:
Tax Administrator I, EDD	Technical Specialist
NAME OF INCUMBENT:	POSITION NUMBER:
<i>Click here to enter text.</i>	280-706-4332-011
OFFICE/SECTION/UNIT:	SUPERVISOR'S NAME:
Central Operations Audit Section	Adrienne Adams
DIVISION:	SUPERVISOR'S CLASSIFICATION:
Field Audit and Compliance	Tax Administrator II, EDD
BRANCH:	REVISION DATE:
Tax	2/1/2026

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

2. REQUIREMENTS OF POSITION

Check all that apply:

- | | |
|---|--|
| ☒ Conflict of Interest Filing (Form 700) Required | ☐ Call Center/Counter Environment |
| ☒ May be Required to Work in Multiple Locations | ☒ Requires Fingerprinting & Background Check |
| ☒ Requires DMV Pull Notice | ☐ Bilingual Fluency (<i>specify below in Description</i>) |
| ☒ Travel May be Required | ☐ Other (<i>specify below in Description</i>) |

Description of Position Requirements:

(e.g., qualified Veteran, Class C driver's license, bilingual, frequent travel, graveyard/swing shift, etc.)

Travel is required for this position.

3. DUTIES AND RESPONSIBILITIES OF POSITION

Summary Statement:

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

Under the direction of the Tax Administrator (TA) II, the TA I Specialist acts as the Field Audit and Compliance Division's (FACD) Technical Specialist. In this role, the TA I Specialist serves as a tax program expert with the highest level of technical program knowledge while serving in an advisory role and as a primary contact with Tax Branch (TB) related to Third Party Payers (TPP). The TA I Specialist will review and respond to the most complex, politically sensitive, and controversial technical issues referred by both internal and external stakeholders. The incumbent will lead the development and implementation of program policies, procedures, technical training modules, Field Audit and Compliance (FAC) notices, etc. The TA I Specialist will also serve as a technical lead, Single Point of Contact (SPOC), and Subject Matter Expert on the employment tax program and provide technical advisory services to various areas within the Employment Development Department, including but not limited to the FACD, Tax Support Division (TSD), Tax Branch, Legal Office, Legislative and Intergovernmental Affairs Office (LIAO), and the Director's Office.

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The TA I Specialist must have extensive knowledge of the laws, policies, and procedures of the Tax Branch and FACD programs to ensure conformity with California Unemployment Insurance Code (CUIC), Title 22, and the Department of Labor requirements. Experience in the Audit program, the Accounting and Compliance Enterprise System and supporting technological systems. Familiarization with current legislation, rulings and opinions by federal and state agencies, and decisions by civil courts and/or the California Unemployment Insurance Appeals Board (CUIAB) is desirable.

Percentage of Duties	Essential Functions
45%	The technical specialist acts as a tax program expert with the highest level of technical program knowledge while serving in an advisory role for the technical auditors within Central Operations. The program specialist will review and oversee the research of timely and accurate responses to complex cases and provide advisory services to multiple areas in the EDD, including but not limited to the FACD, TSD, Tax Branch, Legal Office, LIAO, and the Director's Office. Performs analyses and responses pertaining to the most difficult, politically sensitive, and controversial employment tax issues referred by both internal and external customers. Provides objective recommendations on policy and procedure issues to ensure statewide uniformity of field rulings and audits. Works with the management team in order to detect any deviation from technical accuracy or standards while corresponding with the field regarding the deviations noted. The specialist is responsible for reviewing publications and documents on behalf of the Division Chief.
20%	Conducts reviews of audits, investigations and inspections and prepares statistical analysis of the results. Identifies employment tax trends and reporting errors which will be used to identify areas to increase compliance-focus to support the Audit and Compliance Development Operations programs. Provides data for potential employer enforcement, outreach, and education activities. Conducts research, provides statistical analysis and written reports relating to FACD audit-specific non compliance issues. Provides frequent status updates to the FACD Management Team with recommendations to incorporate techniques and solutions at the program level. Assists in the development, implementation, and maintenance of new techniques and methods to increase employer voluntary compliance through our Audit and CDO programs. Identifies target industries with compliance issues and detects non-compliance schemes utilizing Business Analytic Software, Accounting and Compliance Enterprise System, Single Client Database, and Base Wage File databases. Conducts research, testing, and evaluation of the effectiveness of data sources and prepares various standardized and ad-hoc reports. Identifies critical bottlenecks and develops process improvement recommendations to present to the FACD Management Team. Develops and maintains partnerships with internal and external stakeholders including but not limited to program managers, TSD, Taxpayer Advocate Office, Settlements Office, California Society of Enrolled Agents, Small Business Employer Advisory Committee, National Association of State Workforce, and Federation of Tax Administrators to provide administrative and technical assistance. Participates on Department, Branch and FACD special projects including but not limited to coordinating the ETA 581, SLAA, and non-audit Tax Performance System (TPS) review for FACD. Responsible for the annual Pro Sports Teams Personal Income Tax Reporting.
15%	The TA I Specialist is a SPOC and resource for FAC notices, Employment Tax Notices (ETN), Audit Procedures Handbook, Tax Audit Guidelines, Information Sheets, Tax Status Guide, Training Bulletins, technical training materials, etc. Provides analyses of historical information and data in the FAC notices, ETN, Tax Audit Guidelines, etc. Provides technical expertise and guidance to FACD and/or Tax Branch on compliance projects.
15%	Serves in an advisory role and as a primary contact with TB related to TPP. Responds to escalated TPP phone calls, advisories, inquiries and educates TPP regarding EDD's filing requirements and other processes. Proactively provides suggested changes to the CUIC,

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	regulations, tax program policies and procedures for improvements or due to legislative mandates. Assists in the coordination, support, operational management, and the implementation of changes to the program as a result of any legislative updates or changes in program policy and procedures.	
Percentage of Duties	Marginal Functions	
5%	Performs other duties or special assignments as required.	
4. WORK ENVIRONMENT <i>(Choose all that apply)</i>		
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: Occasionally - activity occurs < 33%	
Lifting: Occasionally - activity occurs < 33%	Bending/Stooping: Occasionally - activity occurs < 33%	
Other: <i>Click here to enter text.</i>		
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: <i>Click here to enter text.</i>		
5. SUPERVISION EXERCISED:		
(List total per each classification of staff)		
None		
6. SIGNATURES		
Employee's Statement:		
<i>I have reviewed and discussed the duties and responsibilities of this position with my supervisor and have received a copy of the Position Statement.</i>		
Employee's Name: <i>Click here to enter text.</i>		
Employee's Signature:		Date:
Supervisor's Statement:		
<i>I have reviewed the duties and responsibilities of this position and have provided a copy of the Position Statement to the employee.</i>		
Supervisor's Name: <i>Click here to enter text.</i>		
Supervisor's Signature:		Date:
7. HRSD USE ONLY		
Classification and 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	3/17/2026
Reasonable Accommodation Unit use ONLY <i>(completed after appointment, if needed)</i>		
<i>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.</i>		
List any Reasonable Accommodations made:		

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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