

POSITION STATEMENT

1. POSITION INFORMATION	
CIVIL SERVICE CLASSIFICATION: Program Technician III	WORKING TITLE: Program Technician III
NAME OF INCUMBENT:	POSITION NUMBER: 280-750-9929-xxx
SECTION/UNIT: San Diego Area Audit Office Technical Audit and Outreach Group	SUPERVISOR'S NAME: Aaron Luchans
DIVISION: Field Audit and Compliance Division	SUPERVISOR'S CLASSIFICATION: Tax Administrator I, EDD
BRANCH: Tax	REVISION DATE: 5/29/2018
Duties Based on: <input checked="" type="checkbox"/> Full Time <input type="checkbox"/> Part Time – Fraction _____ <input type="checkbox"/> Temporary – _____ hours	
2. REQUIREMENTS OF POSITION	
Check all that apply: <input type="checkbox"/> Conflict of Interest Filing (Form 700) Required <input type="checkbox"/> Call Center/Counter Environment <input type="checkbox"/> May be Required to Work in Multiple Locations <input checked="" type="checkbox"/> Requires Fingerprinting & Background Check <input type="checkbox"/> Requires DMV Pull Notice <input type="checkbox"/> Bilingual Fluency (<i>specify below in Description</i>) <input type="checkbox"/> Travel May be Required <input type="checkbox"/> Other (<i>specify below in Description</i>)	
Description of Position Requirements (<i>e.g., qualified Veteran, Class C driver's license, bilingual, frequent travel, graveyard/swing shift, etc.</i>): <i>Click here to enter text.</i>	
3. DUTIES AND RESPONSIBILITIES OF POSITION	
Summary Statement (Briefly describe the position's organizational setting and major functions): Under the general direction of the Tax Administrator I, EDD, the Program Technician III (PT III) will be primarily responsible for responding to audit related inquiries and processing the most complex support work on difficult or multifaceted issues in regard to employment taxes. The PT III ensures compliance with laws, regulations, and policies and assists the taxpayer in complying with the laws. The PT III ensures voluntary compliance with employment taxes using the Accounting and Compliance Enterprise System (ACES).	
Percentage of Duties	Essential Functions
25%	AUDIT SUPPORT As an expert staff resource, conduct pre-audit work involving the most sensitive and complex skip-tracing, account analysis, and Internet searches. Responsible for providing consultation to employers on the audit process; and update case notes. Complete non-status obstructed claims and ensure timely updates to the base wage file. Complete investigations to clear delinquent problems and other minor reporting errors on employers' accounts. Perform Personal Income Tax (PIT) abatements (which result in adjustments to tax assessments) and related ACES adjustments. Review PIT abatements. Enter complex account adjustments on ACES. Assign, coordinate, and review the work of the Audit Program Support Unit as the lead. Process and complete School Employees Fund (SEF) obstructed claims, send SEF Request for Wages (DE 6586) to school districts, contact school districts for follow-ups, attach DE 6586

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	and all case related documents to ACES. Process Disability Insurance Elective Coverage applications.
15%	<p>ACCOUNT ANALYSIS AND RESOLUTION Perform detailed analysis of accounts on ACES and research appropriate processing procedures. Obtain necessary information from employers to resolve complex tax issues and makes detailed on-line account adjustments necessary to correct the account. Provide clear explanations to the employer regarding the status of the account, for example, current employer unemployment insurance tax rate, account balances due, refunds pending, transactions, payment applications and liabilities. Perform account updates, such as ceasing employer accounts, clearing delinquencies and updating employer addresses. Process ACES updates and adjustments and/or general ACES clearance work and handles converted PIT abatement processing. Perform the most difficult level employer completed audits by preparing manual assessments, monitoring the 10 day letter responses and completing the cases. Assist customers with payment inquiries, liens, financial adjustments and provides status of lien release letters.</p>
25%	<p>LEAD DUTIES The PT III acts as a lead person over a program support unit comprised of Program Technicians and Student Assistants. In collaboration with the management team, the PT III develops and implements effective work plans to ensure that the various office support functions are efficiently carried out. The PT III will be a working member of this unit. The PT III may also act as a facilitator to other workgroups and may be called upon to train staff in any of the duties within their expertise.</p>
10%	<p>BUSINESS AND OFFICE PROCESSES Conduct or assist management in processing inventories, safety inspections and related site duties. May assist PT II with service of office machines and computers. Monitor office supply inventories and prepare orders. Perform a wide range of general and clerical duties including cashiering functions, mail duties and processing invoices for payment. Assist in setting up and taking down of equipment, chairs, tables and signage for Tax Branch events at the Area Audit Offices. (i.e. Management visits, training).</p>
15%	<p>ESCROWS Process escrow calls/correspondence for receiving and reviewing requests for clearances. Works closely with escrow companies in resolving the more complex and sensitive employer account problems to ensure timely releases.</p>
5%	<p>CUSTOMER SERVICE Perform or assist staff in the most complex and sensitive advisories. This includes advisories, which require research and application of law unique to the employer's situation. Provide assistance to employers in the areas of wages, employment, tax rates, billing statements and the unemployment insurance reserve account system. Act in a lead capacity to ensure customers obtain the correct forms and publications for proper reporting. Answer reporting questions from employers, such as tax rate information, taxable wage limits and other facts that require knowledge of tax laws and procedures. Inform employers of pending workshops and seminars. Assist and educate employers in completing their state payroll tax forms.</p>
	Marginal Functions
5%	Other duties appropriate for the classification.
4. WORK ENVIRONMENT (Choose all that apply)	
Standing: Occasionally - activity occurs < 33%	Sitting: Continuously - activity occurs > 66%

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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:		
<input type="checkbox"/> High Rise <input checked="" type="checkbox"/> Cubicle <input type="checkbox"/> Warehouse <input type="checkbox"/> Outdoors <input type="checkbox"/> Other:		
Interaction with customers:		
<input type="checkbox"/> Required to work in the lobby <input type="checkbox"/> Required to work at a public counter <input checked="" type="checkbox"/> Required to assist customers on the phone <input type="checkbox"/> Required to assist customers in person <input type="checkbox"/> Other:		
5. SUPERVISION		
Supervision Exercised: 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:		
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		
<input checked="" type="checkbox"/> Duties meet class specification and allocation guidelines. <input type="checkbox"/> Exceptional allocation, 625 on file.	PMG Analyst initials	Date approved
	dmg	6/7/2018
Reasonable Accommodation Unit use ONLY <i>(completed after appointment, if needed)</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.		
List any Reasonable Accommodations made:		
<i>Click here to enter text.</i>		

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)

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- Provide a copy to the employee
- File original in the supervisor's drop file