

State of Board of Equalization

OPERATIONS MEMO

For Public Release

No.: 948
Date: October 2, 1989
Revised: June 18, 1990
Revised: December 3, 1993
Revised: August 15, 2001
Revised: December 27, 2001

SUBJECT: Uniform Working Titles for the Sales and Use Tax Department

I. GENERAL

This operations memo is intended to provide uniform working titles for Headquarters and field office Sales and Use Tax Department personnel. All working titles should be descriptive of the duties, responsibilities and organizational status of the position. Due to the changes in management working titles and the civil service classification structure of both compliance and audit series positions, the following guidelines should be used for the working title on business cards, identification cards and Sales and Use Tax Department correspondence.

II. WORKING TITLES TO BE USED

<u>Description of Position</u>	<u>Civil Service Classification</u>	<u>Working Title to be Used</u>
Administrative head of Sales and Use Tax Department	CEA 4	Deputy Director, Sales and Use Tax Department
Administrative head of field operations	CEA 3	Chief of Field Operations
Assistant administrative head of field operations	Business Taxes Administrator III	Assistant Chief of Field Operations
Administrative head of Program Planning Division	CEA 2	Program Planning Manager
Administrative head of Headquarters Operations Division	CEA 2	Headquarters Operations Manager

<u>Description of Position</u>	<u>Civil Service Classification</u>	<u>Working Title to be Used</u>
Supervisory head of Headquarters compliance or audit section, unit, or team	Business Taxes Administrator II Supervising Tax Auditor I, II, or III Business Taxes Compliance Supervisor II or III Office Services Manager I Office Services Supervisor III Supervising Tax Technician II	Supervisor, (section/unit/team)
Systems Coordinator	Business Taxes Specialist I Staff Information Systems Analyst	Systems Coordinator
LAN Administrator	Business Taxes Compliance Supervisor II Staff Information System Analyst Associate Information Systems Analyst	LAN Administrator
User Security Administrator	Associate Information Systems Analyst	User Security Administrator
Computer Audit Specialist	Business Taxes Specialist I or II	Computer Audit Specialist
Audit, Compliance, IRIS, or Headquarters Training Coordinator	Business Taxes Specialist I or II Business Taxes Compliance Supervisor II Associate Governmental Program Analyst	Audit Training Coordinator Compliance Training Coordinator IRIS Training Coordinator SUTD Training Coordinator
Hearing Representative	Business Taxes Specialist III	Sales and Use Tax Department Hearing Representative
Revenue Opportunity Specialist	Business Taxes Specialist II	Business Taxes Specialist
Business Taxes Specialist I or II performing various Headquarters duties	Business Taxes Specialist I or II	Business Taxes Specialist

<u>Description of Position</u>	<u>Civil Service Classification</u>	<u>Working Title to be Used</u>
Technical Advisor to SUTD Deputy Director, Chief of Field Operations, Headquarters Operations Manager, or Program Planning Manager	Business Taxes Specialist I or II	Technical Advisor
Administrative Assistant to Deputy Director or Chief of Field Operations	Administrative Assistant I or II	Administrative Assistant
Coordinator of Small Business Tax Day Events	Associate Governmental Program Analysts	Small Business Tax Day Coordinator
Associate Tax Auditor - Headquarters	Associate Tax Auditor, BOE	Senior Tax Auditor
Tax Auditor - Headquarters	Tax Auditor, BOE Range A or B	Tax Auditor
Administrator of district office	Business Taxes Administrator III	District Administrator
Administrator of the Chicago, New York or Houston branch office	Supervising Tax Auditor II or III	Area Administrator
Administrator of (California) branch office	Business Taxes Administrator I or II	Branch Office Supervisor
Director of district audit program	Supervising Tax Auditor II or III	District Principal Auditor
Technical Advisor to the District Principal Auditor	Business Taxes Specialist I	Technical Advisor
Supervisor of audit group reporting to the District Principal Auditor	Supervising Tax Auditor I or II	Supervising Tax Auditor
Tax auditor working on the most complex "D" audits	Business Taxes Specialist I	Senior Tax Auditor

Description of Position	Civil Service Classification	<u>Working</u> <u>Title to be Used</u>
Tax Auditor working on more complex audits	Associate Tax Auditor	Senior Tax Auditor
Tax Auditor – district offices	Tax Auditor, BOE Range A or B	Tax Auditor
Director of district compliance program	Business Taxes Compliance Supervisor III	District Principal Compliance Supervisor
Technical Advisor to District Principal Compliance Supervisor	Business Taxes Specialist I	Technical Advisor
LAN Coordinator of district office	Staff Information Systems Analyst (Specialist)	LAN Coordinator
Supervisory head of district compliance section , unit, or team	Business Taxes Compliance Supervisor I or II	Tax Compliance Supervisor
Business Taxes Compliance Specialist	Business Taxes Compliance Specialist	Tax Compliance Specialist
Tax Representative	Business Taxes Representative, Range A or B	Tax Representative
Tax Representative	Business Taxes Representative, Range C	Senior Tax Representative
Tax Technician	Tax Technician I, II, or III	Tax Technician
SUTD Recruiter	Various	Recruiter (see section VI)
Local Tax Appeals Auditor	Business Taxes Specialist II	Sales and Use Tax Dept. Local Tax Appeals Auditor
Audit, Compliance, IRIS, or Technical Manual Coordinator	Business Taxes Specialist I Business Tax Compliance Supervisor II	Audit Manual Coordinator Compliance Manual Coordinator IRIS Manual Coordinator Technical Manual Coordinator

<u>Description of Position</u>	<u>Civil Service Classification</u>	<u>Working Title to be Used</u>
Regulation Coordinator	Business Taxes Specialist I	Sales and Use Tax Department Regulation Coordinator
Business Taxes Committee Team Member	Business Taxes Specialist I or II	Program Policy Specialist

III. BUSINESS CARDS

Business cards furnished to employees of the Sales and Use Tax Department should show the working titles set forth in this Operations Memo for the position held. Cards should be issued in accordance with the guidelines provided in BEAM Section 2155.

IV. USE OF NAME TAGS FOR COUNTER PERSONNEL

Personal name tags should be used for all counter personnel, anyone whose duties require face to face customer service more than 50% of their time, and the service counter supervisor. It is up to the employee's discretion to use first name, first and last names, or title and last name on the name tag (i.e. Ms. Smith).

V. IDENTIFICATION CARDS

Identification cards furnished to employees should show general titles as Tax Auditor or Tax Representative, (with exceptions for Managers, Supervisors, and other limited classifications). When an employee is promoted to a higher classification within the same employment series, they will not be issued a new identification card. For example, when an Associate Tax Auditor is promoted to a Business Taxes Specialist I, the identification card will not be replaced and will continue to show the employee's title as "Tax Auditor."

Replacement of identification cards are handled by the Fiscal Management Division-Accounting Section as described in BEAM Sections 2940 - 2945.

VI. RECRUITER

District recruiters will be provided and shall use business cards that show the working title of Recruiter. Orders for "Recruiter" business cards shall be submitted to and approved by the Chief of Field Operations. These cards are to be used only for recruiting activities.

Example: If you are a Tax Auditor, you will always use the business card that shows your title as Tax Auditor while auditing. A business card showing a working title of Recruiter should only be used for recruiting activities.

VII. USE OF WORKING TITLES ON EXTERNAL CORRESPONDENCE

Correspondence to persons outside the agency should be printed on letterhead of the Board of Equalization and will contain the signature, typewritten name, and working title of the authorized signer. The full working title should be used on correspondence, for example: "District Principal Auditor" not "Principal Auditor". The interoffice memorandum form is not to be used for such correspondence to persons outside the agency.

VIII. EXCEPTION

In special circumstances, an exception to these procedures may be approved. The approval must be in writing from the appropriate department head, the District Office Administrator, or Supervisor of Headquarters section or team.

IX. OBSOLESCENCE

This Operations Memo will become obsolete when the information on working titles has been incorporated into the appropriate manual(s).

Ramon J. Hirsig
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Distribution: 1-D