



Tax Technician, FTB

Agency Code: 7299 Class Code: 7505 Exam Code: 8PB44

Department(s): Franchise Tax Board

Opening Date: 1/13/2010 8:00:00 AM

Final Filing Date: Continuous

Type of Examination: Departmental Open

EEO

An equal opportunity employer to all regardless of age, ancestry, color, denial of family and medical care leave, disability, gender identity or expression, genetic information, marital status, medical condition, military and veteran status, national origin, political affiliation, race, religion, sex, or sexual orientation of any person.

DRUG-FREE STATEMENT

It is an objective of the State of California to achieve a drug-free State work place. Any applicant for State employment will be expected to behave in accordance with this objective, because the use of illegal drugs is inconsistent with the law of the State, the rules governing civil service, and the special trust placed in public servants.

WHO SHOULD APPLY?

Applicants who meet the Minimum Qualifications as stated on this bulletin may apply for and take this Training and Experience Evaluation at any time.

Once you have taken the Training and Experience Evaluation, you may not retake it for 9 months.

FILING INSTRUCTIONS

Final Filing Date: Continuous

SPECIAL TESTING ARRANGEMENTS

Where to Apply: Click the link at the bottom of this bulletin.

If you have a disability and need special assistance or special testing arrangements, contact:

California Department of Human Resources
Examination and Selection Services Section
1-866-844-8671

California Relay Service (7-1-1)

Telecommunications Device for the Deaf (TTY) (916) 654-6336

TTY is a telecommunications device that is reachable only from phones equipped with a TTY device.

SALARY INFORMATION

A: \$3,054.00 - \$3,825.00

B: \$3,448.00 - \$4,320.00

ELIGIBLE LIST INFORMATION

An open eligible list will be established by the California Department of Human Resources for use by the Franchise Tax Board. The names of successful competitors will be merged onto the eligible list in order of final score regardless of test date. Eligibility expires 12 months after it is established. Competitors must then retake the Training and Experience Evaluation to reestablish eligibility.

REQUIREMENTS FOR ADMITTANCE TO THE EXAMINATION

NOTE: All applicants must meet the education and/or experience requirements as stated on this examination bulletin as of the date the test is taken.

MINIMUM QUALIFICATIONS

EITHER I

Experience: One year of experience in the California state service performing duties at a level of responsibility equivalent to that of a Tax Program Assistant, Range C.

OR II

Education: Sixty semester or ninety quarter units of college which must include at least two courses in basic accounting or at least one course each in basic accounting and business or commercial law (persons who will complete the course work requirements during the current quarter or semester will be admitted to the examination, but they must produce evidence of successful completion of the curriculum and the prescribed courses before they may be considered eligible for appointment).

OR III

Experience: Three years of increasingly responsible experience in a financial, commercial, or governmental establishment, at least one year of which shall include one or a combination of activities involving the (1) marketing, distribution, and sale of merchandise; (2) approval of loans; (3) collection on delinquent accounts; or (4) contact of client-customer services which involves the explanation of policies, regulations, or procedures for a public agency or private institution such as a bank, insurance company, credit bureau, or title company.

POSITION DESCRIPTION

A Tax Technician, FTB, under general supervision, performs paraprofessional tasks of tax and non-tax law, regulation and policy enforcement. Collection Program: analyzes, determines appropriate action and initiates various courses of action on collection accounts; communicates with taxpayers to resolve collection problems; prepares bankruptcy or probate claims responding to contacts that may be adversary in nature and follows up to assure final resolution. For special procedures, prepares, adjusts and amends or withdraws bankruptcy or probate claims and responds to verbal and written correspondence regarding objectives to and rejection of bankruptcy claims. Call Center or Public Counter functions in Collections, Audit and Filing Programs: communicate with taxpayers via incoming phone calls or in person; advises, assists and explains various provisions of laws and regulations administered by the department and in the preparation of individual and corporate tax returns and property tax assistance claims; resolve collection

notice problems; handle liability disputes; initiate transactions to correct account errors and modify or release accounts; explain the basis for the liabilities; identify, analyze and release liens; analyze financial statements and recommend payment arrangements; issue assessments for missing years and recommend discharge from accountability. In an Audit setting: performs desk audits and prepares adjustment notices based on audit findings; communicates with tax payers to resolve issues developed by the audit; takes appropriate action on protests of adjustment notices and provides technical assistance to other technicians and clerical support staff. In a Program Support area: performs equivalent paraprofessional, staff or administrative specialties in support of the department's programs. This includes completion of less complex research, analysis, modification and implementation of various legislative proposals, operational changes, forms and quality maintenance procedures and systems used to support and maintain the department's audit and compliance programs.

Positions exist statewide and out of state (including Chicago IL, Houston TX, and Manhattan NY).

EXAMINATION INFORMATION

TRAINING AND EXPERIENCE EVALUATION – Weighted 100%

The examination will consist solely of a Training and Experience Evaluation. To obtain a position on the eligible list, a minimum score of 70% must be received. An applicant will receive his/her score upon completion of the Training and Experience Evaluation process.

[Click here to preview the Training and Experience Examination](#)

KNOWLEDGE AND ABILITIES

Knowledge of:

1. Provisions of the rules, regulations, organizations, and procedures of the Franchise Tax Board.
2. In one or more program areas and applicable tax or non-tax laws.
3. One or more of the functions, applications or processes administered and performed by the Franchise Tax Board.
4. Business and financial practices.
5. Current office methods, technologies, and equipment.
6. Mathematics, spelling, grammar, punctuation, and modern English usage.

Ability to:

1. Interpret, apply, and/or explain provisions of governmental, tax or non-tax rules, regulations, and departmental procedures and policies.
2. Learn rapidly and follow directions.
3. Communicate effectively and tactfully with other staff and with the public in person or over the telephone, including situations involving difficult, disagreeable, and adversarial contacts.
4. Analyze and interpret written and numerical data accurately and adopt an effective course of action.
5. Evaluate situations quickly and accurately, and take effective action.
6. Learn to utilize personal computer systems and software applications in the performance of work.
7. Accurately and quickly enter data into a computerized database.
8. Recognize questions or situations outside the employee's area of responsibility or knowledge and refer these to appropriate sources.
9. Write effectively.

VETERANS' PREFERENCE

Veterans' Preference will be granted for this examination. Effective January 1, 2014, in accordance with Government Codes 18973.1 and 18973.5, whenever any veteran, widow or widower of a veteran, or spouse of a 100 percent-disabled veteran achieves a passing score on an open examination, he or she shall be ranked in the top rank of the resulting eligibility list. This section shall not apply to any veteran who has been dishonorably discharged or released.

CAREER CREDITS

Career Credits **will not** be added to the final score for this exam, because it does not meet the requirements to qualify for Career Credits.

CONTACT INFORMATION

If you have any questions concerning this examination bulletin, please contact:

California Department of Human Resources
Attn: Examination Services
1515 S Street
Sacramento, CA 95811

1-866-844-8671
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GENERAL INFORMATION

For an examination with a written feature, it is the candidate's responsibility to contact the testing department three weeks after the Final Filing Date if he/she has not received his/her notice.

If a candidate's notice of written test fails to reach him/her 3 days prior to their scheduled appointment., he/she must contact CalHR at 1-866-844-8671.

Examination Locations: When a written test is part of the examination, it will be given in such places in California as the number of candidates and conditions warrant. However, locations may be limited or extended as conditions warrant.

Applications are available at www.jobs.ca.gov and local offices of the Employment Development Department.

If you meet the requirements stated on this examination bulletin, you may take this examination, which is competitive. Possession of the entrance requirements does not assure a place on the eligible list. Your performance in the examination described on this bulletin will be rated against a predetermined jobrelated rating, and all candidates who pass will be ranked according to their scores.

The California Department of Human Resources reserves the right to revise the examination plan to better meet the needs of the service, should the circumstances under which this examination was planned change. Such revision will be in accordance with civil service laws and rules, and all competitors will be notified.

Candidates needing special testing arrangements due to a disability must mark the appropriate box on the application and contact the testing department.

Hiring Interview Scope: In a hiring interview, in addition to the scope described in this bulletin, the panel will consider education, experience, personal development, personal traits, and fitness. In appraising experience, more weight may be given to the breadth and recency of pertinent experience, and evidence of the candidate's ability to accept and fulfill increasing responsibilities than to the length of his/her experience. Evaluation of a candidate's personal development will include consideration of his/her recognition of his/her own training needs; his/her plans for self-development; and the progress he/she has made in his/her efforts toward self-development. For more information, you may refer to the [Class Specification](#)

General Qualifications: Candidates must possess essential personal qualifications including integrity, initiative, dependability, good judgment, the ability to work cooperatively with others, and a state of health consistent with the ability to perform the assigned duties of the class. A medical examination may be required. In open examinations, investigation may be made of employment records and personal history, and fingerprinting may be required.

Eligible Lists: Eligible lists established by competitive examination, regardless of date, must be used in the following order: 1) sub-divisional promotional, 2) departmental promotional, 3) multi-departmental promotional, 4) service-wide promotional, 5) departmental open, and 6) open. When there are two lists of the same kind, the older must be used first. Eligible lists will expire in one to four years unless otherwise stated on the bulletin.

Veterans' Preference: Effective January 1, 2014, in accordance with Government Codes 18973.1 and 18973.5, Veterans' Preference will be awarded as follows: 1) Any veteran, widow or widower of a veteran, or spouse of a 100 percent disabled veteran, who achieves a passing score in an entrance examination, shall be ranked in the top rank of the resulting eligibility list. Any veteran who has been dishonorably discharged or released is not eligible for Veterans' Preference. 2) An entrance examination is defined, under the law, as any open competitive examination. And 3) Veterans' Preference is not granted once a person achieves permanent civil service status.

Veteran status is verified by the California Department of Human Resources (CalHR). Directions to apply for Veterans' Preference are on the Veterans' Preference Application (Std. Form 1093), which is available at [Veterans' Information](#), and the Department of Veterans Affairs.

Bulletin Revision Date: 1/28/2022

TAKING THE EXAM

When you click the link below, you will be directed to the Training and Experience Evaluation. At the end of the Training and Experience Evaluation, it will be instantly scored.

[click here to go to the Training and Experience Exam](#)

Additionally, if you have a disability please select the "Reasonable Accommodations" box during the self-scheduling process.