



STATE OF CALIFORNIA  
**Franchise Tax Board**

## **Tax Technician, Franchise Tax Board**

**Exam Code: 8PB44**

**Department:** Franchise Tax Board

**Exam Type:** Departmental, Open

**Final Filing Date:** Continuous

### **CLASSIFICATION DETAILS**

**Tax Technician, Franchise Tax Board** – \$3,130.00 - \$4,428.00 per month.

View [the Tax Technician, Franchise Tax Board classification specification](#)

### **APPLICATION INSTRUCTIONS**

Final Filing Date: Continuous

#### **Who Should Apply:**

Applicants who meet the minimum qualifications as stated on this bulletin may apply for and take this examination.

Once you have taken this examination, you may not retake it for **nine (9) months**.

#### **How To Apply:**

The link to connect to the Training and Experience Evaluation is located farther down on this bulletin in the “Taking the Exam” section.

#### **Special Testing Arrangements:**

If you require assistance or alternative testing arrangements due to a disability, please contact the testing department listed in the Contact Information section of this bulletin.

### **MINIMUM QUALIFICATIONS**

All applicants must meet the education and/or experience requirements as stated on this exam bulletin to be accepted into the examination. Part-time or full-time jobs, regardless of whether paid or volunteer positions, and inside or outside California state service will count toward experience.

## **Tax Technician, Franchise Tax Board**

### **Either 1**

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 2**

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 3**

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**

### **Tax Technician, Franchise Tax Board**

A Tax Technician, Franchise Tax Board, 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 SCOPE**

This examination consists of the following components:

**Training and Experience Evaluation** – Weighted 100% of the final score.

The examination consists solely of a **Training and Experience Evaluation**. To obtain a position on the eligible list, a minimum score of 70% must be received. Applicants will receive their score upon completion of the Training and Experience Evaluation process.

In addition to evaluating applicants' relative knowledge, skills, and ability, as demonstrated by quality and breadth of education and/or experience, emphasis in each exam component will be measuring competitively, relative job demands, each applicant's:

### **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.

## ELIGIBLE LIST INFORMATION

A departmental, open eligible list for the **Tax Technician, Franchise Tax Board** classification will be established for:

### Franchise Tax Board

The names of **successful** competitors will be merged onto the eligible list in order of final score regardless of exam date. Eligibility expires **twelve (12) months** after it is established. Applicants must then retake the examination to reestablish eligibility.

Veterans' Preference will be granted for this examination. In accordance with Government Codes 18973.1 and 18973.5, whenever any veteran, or widow or widower of a veteran achieves a passing score on an open examination, he or she shall be ranked in the top rank of the resulting eligible list.

Veterans status is verified by the California Department of Human Resources (CalHR). Information on this program and [the Veterans' Preference Application](#) (Std. form 1093) is available online. Additional information on veteran benefits is available at the Department of Veterans Affairs.

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.

## EXAMINATION INFORMATION

[Preview of the Tax Technician, Franchise Tax Board Training and Experience Evaluation](#)

## PREPARING FOR THE EXAMINATION

Here is a list of suggested resources to have available prior to taking the exam.

**Employment History:** Employment dates, job titles, organization names and addresses, names of supervisors or persons who can verify your job responsibilities, and phone numbers of persons listed above.

**Education:** School names and addresses, degrees earned, dates attended, courses taken (verifiable on a transcript), persons or office who can verify education, and phone numbers of persons or offices listed above.

**Training:** Class titles, certifications received, names of persons who can verify your training, and phone numbers of persons listed above.

## TAKING THE EXAMINATION

Take [the Tax Technician, Franchise Tax Board examination](#).

## TESTING DEPARTMENTS

Franchise Tax Board

## CONTACT INFORMATION

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

California Department of Human Resources  
Attn: Examination Services  
1515 S Street  
Sacramento, CA 95811  
Phone: 1-866-844-8671  
California Relay Service: 1-800-735-2929 (TTY), 1-800-735-2922 (Voice)

If you have any administrative questions concerning this examination bulletin, including provision of reasonable accommodation for this testing process, please contact:

Franchise Tax Board, Examination Unit  
P.O. Box 550  
Sacramento, CA 95812-0550  
Phone: (916) 845-3608  
Email: [ExamAnalysts@ftb.ca.gov](mailto:ExamAnalysts@ftb.ca.gov)

TTY is a Telecommunications Device for the Deaf, and is reachable only from phones equipped with a TTY Device.

## EQUAL OPPORTUNITY EMPLOYER

The State of California is an equal opportunity employer to all, regardless of age, ancestry, color, disability (mental and physical), exercising the right of family care and medical leave, gender, gender expression, gender identity, genetic information, marital status, medical condition, military or veteran status, national origin, political affiliation, race, religious creed, sex (includes pregnancy, childbirth, breastfeeding, and related medical conditions), and sexual orientation.

## 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.

## GENERAL INFORMATION

Examination and/or Employment Application (STD 678) forms are available at the California Department of Human Resources, local offices of the Employment Development Department, and through your [CalCareer Account](#).

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 in this bulletin will be rated against a predetermined job-related rating, and all applicants who pass will be ranked according to their score.

The Franchise Tax Board reserves the right to revise the examination plan to better meet the needs of the service, if the circumstances under which this examination was planned change. Such revision will be in accordance with civil service laws and rules and all applicants will be notified.

**General Qualifications:** Applicants must possess essential personal qualifications including integrity, initiative, dependability, good judgement, 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) servicewide promotional, 5) departmental open, 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.

**High School Equivalence:** Equivalence to completion of the 12<sup>th</sup> grade may be demonstrated in any one of the following ways: 1) passing the General Education Development (GED) Test; 2) completion of 12 semester units of college-level work; 3) certification from the State Department of Education, a local school board, or high school authorities that the competitor is considered to have education equivalent to graduation from high school; or 4) for clerical and accounting classes, substitution of business college work in place of high school on a year-for-year basis.