



STATE OF CALIFORNIA
Franchise Tax Board

Tax Program Technician I, Franchise Tax Board

Exam Code: 0PBJP

Department: Franchise Tax Board

Exam Type: Departmental, Open

Final Filing Date: Continuous

CLASSIFICATION DETAILS

Tax Program Technician I, Franchise Tax Board – \$3,602.00 - \$4,513.00 per month.

View [the Tax Program Technician I, 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.

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Experience applicable to any pattern may be combined on a proportional basis with experience applicable to other patterns to meet the total experience requirements.

Either I

Experience: In the California state service, one year of experience in the Franchise Tax Board, at a level of responsibility equivalent to a Tax Program Assistant (TPA), Range C. (Applicants who are within six months of satisfying the experience requirement will be admitted to the examination, but they must fully meet the experience requirement before being eligible for appointment.)

Or II

Experience: Two years of experience in a governmental, financial, or private organization, in one or a combination of the following:

1. Extensive customer/public contact with primary responsibility for receiving, resolving, or adjusting customer accounts, including the ability to resolve collection accounts and interpret technical or regulatory information. **Or**
2. Activities which provide knowledge of the regulations and policies governing the tax and nontax programs of the Franchise Tax Board.

(Experience in the California state service applied toward these requirements must include at least one year at a level of responsibility equivalent to that of a Tax Program Assistant, Range C.) (Education above the 12th grade may be substituted for this pattern on a year-for-year basis. Course work must include two courses in either accounting, math, computer science, business administration, or public communications. Public speaking 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.)

POSITION DESCRIPTION

Tax Program Technician I, Franchise Tax Board

This is the entry and full journey level for the series. Under general supervision, incumbents perform work assignments in the areas of audit and collections; answer correspondence regarding such matters as determination of residency and allowable expenses on tax returns; authorize and make allowances of tax credits, incomes, and exemptions; resolve accounting problems resulting from issuance of proposed assessments; abate tax and issue refunds; assess tax and make adjustments to accounts when necessary; prepare complex account resolutions and transactions; and provide assistance with technology applications. This level may have lead responsibility over less experienced employees, such as Tax Program Assistants and seasonal employees, in areas such as training and answering questions on work procedures.

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, organization, and procedures of the Franchise Tax Board.
2. One or more program areas and applicable tax or nontax laws.
3. One or more of the functions, applications, or processes administered and performed by the Franchise Tax Board.
4. Current office methods, technologies, and equipment.
5. Grammar, simple mathematics, spelling, punctuation, and modern English usage.

Ability to:

1. Perform clerical and technical work.
2. Interpret, apply, and explain provisions of governmental, tax or nontax rules, regulations, and departmental procedures and policies.
3. Follow and give directions.
4. Evaluate situations quickly and accurately, and take effective action.
5. Review submitted data for completeness and appropriateness.
6. Learn to utilize personal computer/microcomputer systems and software applications in the performance of technical work.
7. Accurately and quickly enter data into a computerized database.
8. Use tact and good judgment in communicating with the public.
9. Read and write English at a level required for successful job performance.
10. Recognize questions and situations outside the employee's area of responsibility or knowledge and refer these to appropriate sources.

ELIGIBLE LIST INFORMATION

A departmental, open eligible list for the **Tax Program Technician I, 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 **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 of this examination.

EXAMINATION INFORMATION

[**Preview of the Tax Program Technician I, 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 Program Technician I, 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

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 12th 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.