



STATE OF CALIFORNIA
Franchise Tax Board

STATE OF CALIFORNIA

PROGRAM SPECIALIST II

DEPARTMENTAL PROMOTIONAL EXAMINATION

Location: Statewide

Final Filing Date: September 08, 2023

MISSION STATEMENT

Mission of the Franchise Tax Board: Our mission is to help taxpayers file timely and accurate tax returns, and pay the correct amount to fund services important to Californians.

EEO

The State of California is an equal opportunity employer to all, regardless of age, ancestry, color, disability (mental and physical), exercising the right to 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.

WHO SHOULD APPLY?

Applicants who meet the minimum qualifications as stated below may apply for this examination. All applicants must meet the education and/or experience requirements as stated on this examination announcement.

This is a promotional examination for Franchise Tax Board (FTB). In order to take this examination:

1. Applicant must have a permanent civil service appointment without a break in service, with the Franchise Tax Board, by the final filing date; **or**
2. Applicant must be a current or former employee of the Legislature for two or more years as defined in Government Code Section 18990; **or**
3. Applicant must be a current or former non-elected exempt employee of the Executive Branch for two or more consecutive years as defined in Government Code Section 18992; **or**
4. Applicant must be a person retired from the United States Military, honorable discharged from active duty with a service-connected disability; or honorably discharged from active duty as defined in Government Code Section 18991. **Veterans must provide a copy of their DD214 for entrance requirements.** Please attach your DD214 to your application. **Veterans' preference will not be granted in promotional examinations.**

For applicants under items 2, 3, or 4, if promotional examinations are given by more than one department for the same classification, the applicant must select one department in which to compete. Refer to the General Information,

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Promotional Examinations Only section of this bulletin for other eligibility requirements. Under certain circumstances, former FTB employees may be allowed to compete under the provisions of Rule 235.

FILING INSTRUCTIONS

FINAL FILING DATE TO SUBMIT AN APPLICATION: September 08, 2023

Applications (STD. 678) are available at CalHR's website <https://jobs.ca.gov/pdf/std678.pdf>.

Unfortunately Electronic/Email applications are not an option when applying for exams.

Applications can only be filed either in person or by mail:

In Person:

Franchise Tax Board
9646 Butterfield Way
Sacramento Bldg., Exam Unit
Sacramento, CA 95827
Drop off at Welcome Center in Main Lobby
(may be non-operational on weekends and holidays)

By Mail:

Franchise Tax Board
ATTN: Exam Unit
P.O. Box 550
Sacramento, CA 95812-0550

APPLICATIONS MUST CONTAIN ORIGINAL SIGNATURES AND MUST BE SUBMITTED TO THE ADDRESS INDICATED ABOVE.

If signatures are missing on your application and not re-submitted by the close date of the exam, scores will not be recorded and candidates will have to wait 9 months before being eligible to re-take the exam. It is also the candidate's responsibility to follow up with the examination unit to make sure sign applications were received.

Applications (STD.678) must be **POSTMARKED** no later than the final filing date. Applications postmarked, personally delivered, or received via interoffice mail after the final filing date will not be accepted.

Candidates are encouraged to obtain and retain proof that their applications were mailed timely. The Examination Unit will **not** accept late applications if candidates are unable to provide valid proof that their applications were mailed timely.

Dates printed on Mobile Bar Codes, such as the Quick Response (QR) Codes available at the USPS, are not considered Postmark dates for the purpose of determining timely filing of an application.

NOTE: The Qualification Assessment (QA) exam link will be sent to YOUR FTB EMAIL ADDRESS from Survey Monkey. All examination notifications, with the exception of the QA email link, will be sent by mail. Any requests for alternative email addresses must be requested by contacting the Examination Unit at ExamStaff@ftb.ca.gov.

SELECTION PLAN

It is anticipated that candidates who meet the minimum qualifications for this examination will be sent an email the **week of October 09, 2023**, which will contain the instructions and the link to complete the online Qualifications Assessment (QA) examination. **It is the candidate's responsibility to read the letter that is enclosed with their acceptance notice which provides specific instructions/dates about the QA link.** It is also the candidate's responsibility to contact Franchise Tax Board's Examination Unit at (916) 845-3608 or email ExamStaff@ftb.ca.gov if they have not received the QA link by the date indicated on the letter.

SPECIAL TESTING ARRANGEMENTS

If you have a disability and need special assistance or special testing arrangements, contact Franchise Tax Board (FTB), Examination/Certification Unit at (916)845-3608, or via the California Relay Service for the Deaf or Hard of Hearing at (800)735-2929 from TTY phones and (800) 735-2922 from voice phones.

Additionally, please select the "Reasonable Accommodations" box when filling out the application.

SALARY

\$7,339.00 - \$9,648.00

If applicable, \$346.00 per month out-of-state differential will be added to the above salaries.

ELIGIBLE LIST INFORMATION

A departmental, promotional merged list will be established for the Franchise Tax Board. The names of successful competitors will be merged onto the eligible list in order of final scores regardless of test date. List eligibility will expire 12 months after it is established. Competitors will be able to retake the exam (Qualifications Assessment) after 9 months to reestablish list eligibility.

NOTE: In order to maintain list eligibility, competitors must participate in the current exam administration.

REQUIREMENTS FOR ADMITTANCE TO THE EXAMINATION

NOTE: All applicants must meet the education and/or experience requirements as stated on this examination bulletin by the final filing date. Your signature on your application indicates that you have read, understood, and possess the qualifications required.

Applications/resumes **MUST** contain the following information: "to" and "from" dates (month/day/year), time base, civil service class title(s), and range, if applicable. College course information **MUST** include: title, semester or quarter credits, name of institution, completion dates, and degree (if applicable).

Applications/resumes received without this information may be rejected.

NOTE: It is especially important that each applicant take special care to accurately and completely fill out their application. List all experience relevant to the "Minimum Qualifications" shown on this announcement.

MINIMUM QUALIFICATIONS

EITHER I

Experience: One year of experience in the California state service performing the duties of a Program Specialist I, Franchise Tax Board. **or**

Experience: Two years of experience in the California state service as a technical supervisor of highly skilled specialists performing audits in the class of Administrator I, Franchise Tax Board

OR II

Experience: Five years of increasingly responsible professional tax accounting, tax consulting and planning, auditing, or administrative tax program experience. (Experience in the California state service applied toward this requirement must include at least one year performing the duties of a Program Specialist I, Franchise Tax Board.)

Education Requirements: Applicants competing under the non-State experience pattern must have:

A. Equivalent of graduation from college with a specialization in accounting. **or**

B. Completion of either:

1. A prescribed professional accounting curriculum given by a residence or correspondence school of accountancy, including courses in elementary and advanced accounting, auditing, cost accounting, and business law. **Or**
2. The equivalent of 16 semester hours of professional accounting courses given by a collegiate-grade residence institution, including courses in elementary and advanced accounting, auditing, and cost accounting; and three semester hours of business law.

NOTE: Qualifying experience may be combined on a proportionate basis if the requirements stated above include more than one pattern and are distinguished as “Either I,” “or II,” “or III,” etc., unless otherwise stated.

PROOF OF EDUCATION

Applicants using education to meet the minimum requirements must provide a copy of their diploma, official/unofficial transcript, statement and/or evaluation from an accredited U.S. college or university with their examination application. If an applicant is not able to provide proof of education from a recognized institution at the time of hire, their name may be removed from the eligible list(s).

FOREIGN DEGREES

Applicants with foreign transcripts must provide an official/unofficial foreign transcript evaluation that indicates the number of units to which his/her foreign course work is equivalent. FTB accepts foreign transcript evaluations that are completed by one of the agencies approved by the California Commission on Teachers Credentialing. Agencies accredited by the Commission for Foreign Transcription Evaluation may be found on the Commission's website: www.ctc.ca.gov.

NOTE: All documents submitted become the property of the FTB. Do not submit original diplomas with the examination application.

POSITION DESCRIPTION

The Program Specialist II, Franchise Tax Board, has a primary assignment as a team leader, industry expert, or reviews audits of the largest and most complex returns of individual income taxpayers, pass-through entities, corporations, and/or multistate/multinational entities. Incumbent acts as a highly skilled technical specialist on program wide audit practices, policies, and issues.

Positions exist in California, Chicago, Houston, and New York.

EXAMINATION INFORMATION

Qualifications Assessment -- Weighted 100%

This examination will consist of a Qualifications Assessment weighted 100%. Candidates must attain an overall minimum

score of 70% in order to be placed on the eligible list.

CANDIDATES WHO DO NOT COMPLETE OR SUBMIT THE QUALIFICATIONS ASSESSMENT BY THE DUE DATE WILL BE DISQUALIFIED.

NOTE: If conditions warrant, this examination may utilize an evaluation of each candidate's experience and education compared to a standard developed from the class specification. For this reason, it is especially important that candidates take special care in accurately and completely filling out their application. List all experience relevant to the "Requirements for Admittance to the Examination" shown on this announcement.

SCOPE OF EXAMINATION

Candidates should be prepared to answer pre-determined, job-related questions identified under the Knowledge, Skills, Abilities, and Personal Characteristics.

KNOWLEDGE, SKILLS, ABILITIES, AND PERSONAL CHARACTERISTICS

Knowledge of:

1. The Department's policies regarding confidential taxpayer information in order to protect taxpayer privacy.
2. California Personal Income tax and Business Entity tax laws in order to understand filing requirements and compliance issues.
3. Federal Personal Income tax and Business Entity tax laws and regulation in order to determine California conformity to federal provisions.
4. State and federal legislative processes to understand the effective dates of the tax laws and whether a taxpayer is properly adhering to the effective dates.
5. The principles, theories, techniques and practices of accounting, management and auditing, as well as basic trends and current developments in the auditing profession within the government and public accounting firms.
6. FTB practices, policies and procedures in order to maintain consistency in the application of the Federal and state tax laws applicable to individuals and business entities.
7. The legal precedents, court decision, legal opinions and rulings that would impact a taxpayer in order to resolve compliance issues.
8. The Department's policy on sexual harassment and other guidelines on personal conduct to behave in a professional manner with coworkers and others.
9. FTB computer systems in order to perform auditing activities.
10. FTB computer systems in order to understand taxpayer's filing activity and history.
11. The English language including: grammar, spelling, punctuation, sentence and paragraph structure, organization, pronunciation and appropriate vocabulary to write well and develop quality documents.

Skill to:

1. Locate and research relevant, useful information from a variety of sources in order to determine the application to policies, procedures, projects or cases.
2. Prepare clear and complete written documents to support recommendations or conclusions.
3. Speak in a concise and organized manner in order to communicate effectively.
4. Plan, organize and manage multiple assignments, workloads, and/or projects to ensure timely completion.
5. Edit written documents prepared by others to improve the accuracy, clarity, and effectiveness of documents sent out to the public.
6. Select the principles, theories, techniques, and procedures of auditing that are best suited to the audit assignments.

Ability to:

1. Gather and analyze facts, reason logically, and prioritize critical issues to make sound decision.
2. Analyze pertinent laws in order to determine the impact of departmental manual, guidelines, forms, publications, policies, procedures and compliance.
3. Analyze significant and complex tax issues to identify compliance issues for projects or cases.
4. Identify deliberate misrepresentations by taxpayers to establish evidence of wrongdoing.
5. Weigh the relative advantages and disadvantages of potential alternatives and apply knowledge and judgment to determine the proper course of action.
6. Interpret and apply tax laws in order to determine tax compliance issues and draw accurate and sound conclusions.
7. Resolve sensitive and complex matters.
8. Understand the taxpayer's activities and to apply that knowledge to efficiently gather relevant data.
9. Interact and communicate well with coworkers, taxpayers, and representatives in order to maintain a professional working relationship.
10. Communicate sensitive and complex issues verbally in a manner that allows others to understand the impacts to policy, procedures, projects, or cases.
11. Be truthful, forthcoming and act in a manner that maintains the integrity and credibility of the audit process.
12. Communicate sensitive and complex issues in writing in a manner that allows others to understand the impacts to policy, procedures, projects, or cases.
13. Be flexible and adapt to changing priorities in order to manage and maintain projects or cases to meet deadlines.
14. Work cooperatively in a team environment in order to meet the team's purpose and objectives within set time frames.
15. Be flexible regarding working conditions, travel requirements, and working hours based on operational needs.
16. Behave responsibly and be accountable for actions taken in order to be a credible team leader.
17. Work independently in order to make decisions and meet deadlines.
18. Stay calm under pressure and maintain composure in order to function effectively in the face of deadlines or other anxiety producing circumstances.
19. Perform work in an accurate, consistent and thorough manner with a high degree of quality.
20. Adapt personal writing style to the Department's writing style to ensure consistency of work products nationwide.
21. Express one's point of view in an assertive but tactful manner to persuade others.
22. Share expertise and willingness to serve as a resource to improve team effectiveness and promote staff development.
23. Observe, recognize and distinguish pertinent details in order to sort out the most relevant information from data sources.
24. Accept constructive criticism of work products and practices in order to continually improve work performance.
25. Gain the cooperation of others to increase efficiency and effectiveness.
26. Provide technical guidance to staff to develop their job knowledge, abilities and skills.
27. Lead staff on teams in order to direct a project or case to conclusion.
28. Devise unique solutions, visualize the effect of changes, exercise creativity and inventiveness in order to resolve new problems that develop.
29. Identify situations in which available information, resources or capabilities are insufficient to complete work tasks and seek assistance when needed.
30. Use office computer software products in order to prepare reports, manage workloads and document project information.
31. Quickly develop new knowledge of specialized procedures and subject matter in order to assimilate new workloads and assignments.

BENEFITS

To learn more about the comprehensive benefit package please visit the CalPERS website at <http://www.calpers.ca.gov>.

VETERANS' PREFERENCE

Veterans' Preference will not be granted in the examination, as it does not meet the requirements to qualify for Veterans' Preference.

CAREER CREDITS

Career Credits will not be added to the final score of this examination.

CONTACT INFORMATION

For additional information regarding this examination, please contact the Franchise Tax Board Examination Unit at (916) 845-3608 or ExamStaff@ftb.ca.gov.

DISCLAIMER

Please click on the link below to review the official California State Personnel Board class specification:
<http://www.calhr.ca.gov/state-hr-professionals/pages/4364.aspx>

GENERAL INFORMATION

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

It is the candidate's responsibility for an examination without a written feature to contact the Franchise Tax Board three weeks after the final filing date if he/she has not received any notification.

It is the candidate's responsibility for an examination with a written feature to contact the Franchise Tax Board six weeks after the final filing date if he/she has not received any notification.

If a candidate's notice was not received due to a verified postal error, he/she will be rescheduled upon written request. It is the candidate's responsibility to contact the Franchise Tax Board at (916) 845-3608.

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 of interviews or performance evaluations may be limited or extended as conditions warrant.

Examination Applications are available at www.jobs.ca.gov, CalHR State Jobs Center, State Personnel Board offices, local offices of the Employment Development Department and the testing department on this job bulletin.

If you meet the requirements stated on this bulletin, you may take this examination, which is competitive. Possession of the entrance requirement does not assure a place on the eligible list. Your performance in the examination will be compared with the performance of the others who take this test, and all candidates who pass will be ranked according to their scores.

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

General Qualifications: Candidates must possess essential personal qualifications including integrity, initiative, dependability, good judgment, and 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, 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.

Promotional Examinations Only: Competition is limited to employees who have a permanent civil service appointment and military veterans that meet all the minimum qualifications. Under certain circumstances, other employees may be allowed to compete under provisions of Rules 234, 235, and 235.2. State Personnel Board Rules 233, 234, 235, 235.2, and 237 contain provisions regarding civil service status and eligibility for promotional examinations. These rules may be reviewed at <http://www.spb.ca.gov/>.

If High School Equivalence is Required: Equivalence to completion of the 12th grade may be demonstrated in any one of the following ways: 1) passing the General Educational Development (GED) Test; 2) completion of 12 semester units of college work; 3) certification from the State Department of Education, a local school board, or high school authorities that the candidate is considered to have education equivalent to graduation from high school; 4) for clerical and accounting classes, substitution of business college work in place of high school on a year-for-year basis. NOTE: For peace officer classifications please refer to the testing department for special requirements.

Veterans' Preference: California Law (Government Code 18971-18979) allows the granting of Veterans' Preference in Open entrance and Open, Non-Promotional entrance examinations. Veterans' Preference will be granted to all competitors who are successful in these types of examinations, and who qualify for and have requested the Veterans' preference by mail. In Open entrance examinations, Veterans' Preference is granted to competitors who achieve a passing score, shall be placed in the top rank of the resulting eligibility list. Any veteran who has been dishonorably discharged or released is not eligible for Veterans' Preference.

Employees who have achieved permanent State civil service status are not eligible to receive Veterans' Preference. Permanent State civil service status means the status of an employee who is lawfully retained in his/her position after completion of the applicable probationary period. This includes permanent intermittent, part-time, and full-time appointments. In addition, individuals who at any time achieved permanent State civil service status and subsequently resigned or were dismissed from State civil service are not eligible to receive Veterans' Preference. Veteran status is verified by CalHR.

How to Apply for Veterans' Preference: Directions to apply for Veterans' Preference Points are on the Veterans' Preference Application ([CalHR 1093](#)) which is available at www.jobs.ca.gov or from CalHR, 1810 16th Street Sacramento, CA 95811 and the Department of Veterans Affairs. For additional information, go to Department of Veterans' Affairs website at www.cdva.ca.gov.

Felony Disqualification: You are disqualified from being employed as a peace officer if: (1) You have been convicted of a felony in California or any other state; (2) you have been convicted of any offense in any other state which would have been a felony if committed in California; (3) you have been charged with a felony and adjudged by a superior court to be mentally incompetent; (4) you have been adjudged addicted or in danger of becoming addicted to narcotics, convicted, and committed to a State institution. If you have been convicted of a felony, you may be allowed to participate in this examination if your conviction(s): (1) has/have been sealed under Penal Code Section 851.7, 851.8, 1203.45, or Health and Safety Code Section 11361.5; (2) has/have been expunged or is/are expugnable pursuant to Health and Safety Code Section 11361.5 regarding marijuana offenses; (3) was/were stipulated or designated to be a lesser included offense of marijuana possession under Health and Safety Code Section 11557 or 11366.

TDD is Telecommunications Device for the Deaf and is reachable only from phones equipped with a TDD Device. California Relay Service (Telephone) for the deaf or hearing impaired. From TDD phones: 1-800- 735-2929 or from voice phone: 1-800-735-2922.

Franchise Tax Board, Examination Unit

P.O. Box 550, Sacramento, CA 95812-0550

Phone: (916) 845-3608

Website: www.ftb.ca.gov