



**CDTFA**  
CALIFORNIA DEPARTMENT OF  
TAX AND FEE ADMINISTRATION

## **Business Taxes Representative**

**Exam Code: 7PB48**

**Department:** California Department of Tax and Fee  
Administration

**Exam Type:** Departmental, Open

**Final Filing Date:** Continuous

### **CLASSIFICATION DETAILS**

**Business Taxes Representative** – \$4,214.00 - \$6,526.00 per month

View the [Business Taxes Representative classification specification](#)

**If you tested for the Business Taxes Representative classification as part of the Tri-agency exam in 2018, it may be too early for you to take this exam. Please check your CalCareer account for the retake date on your exam results notification for this classification BEFORE continuing this exam process. Retaking this exam under another or a new User I.D. and password, Social Security Number (voluntary, not required, information), or name is not allowed.**

### **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:**

Bulletin Date: 12/29/2023

If you require special testing arrangements due to a verified disability or medical condition, 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.

### **All Levels:**

Experience applicable to one of the following patterns may be combined, on a proportional basis, with experience applicable to another pattern to meet the total experience requirement.

### **Business Taxes Representative**

**Education:** Completion of at least four college-level courses, given by an approved collegiate-grade residence institution, which includes the equivalent to completion of: (1) two professional level courses in elementary and/or intermediate accounting; (2) one course in either business or commercial law; and (3) one course in either economics, business mathematics, or English.

### **AND**

#### **Either 1**

**Experience:** Six months of experience in the California state service in the class of either Management Services Technician, Range B, or Program Technician 3 performing tax compliance duties at the Employment Development Department, the Franchise Tax Board, or the State Board of Equalization, or performing Medi-Cal overpayment recovery duties at the Department of Health Care Services.

#### **Or 2**

**Experience:** One year of experience in the California state service in the class of Program Technician 2 performing tax compliance duties at the Employment Development Department, the Franchise Tax Board, or the State Board of Equalization, or performing Medi-Cal overpayment recovery duties at the Department of Health Care Services.

#### **Or 3**

**Experience:** One year of experience in one or a combination of the following:

- a. As the owner or manager of a business performing management activities in the marketing, distribution, or sale of merchandise, which requires broad public or customer contact; or
- b. As a credit manager, loan officer, or field collector performing duties with responsibilities involving the approval of loans or credit or the collection of delinquent accounts; or
- c. Performing tax compliance duties in another governmental entity.

(Experience in the California state service applied toward this pattern must include six months at a level equivalent to the Management Services Technician, Range B, or Program Technician 3, or one year at a level equivalent to the Program Technician 2.)  
**and**

**Education:** Equivalent to completion of two years (60 semester or 90 quarter units) of college. (Additional experience may be substituted for the required general education on a year-for-year basis. No substitution is permitted for the specific course work required.) (Applicants who will complete the required education during the current quarter or semester will be admitted to the examination; however, evidence of successful completion of the curriculum and prescribed courses must be produced before being considered eligible for appointment.)

#### **Or 4**

**Education:** Equivalent to graduation from college (registration as a senior student in a recognized institution will admit applicants to the examination; however, evidence of successful completion of the curriculum and the prescribed courses must be produced before being considered eligible for appointment.)

## **POSITION DESCRIPTION**

### **Business Taxes Representative**

Business Taxes Representatives provide assistance to taxpayers to ensure compliance with tax laws, collect delinquent taxes, and perform a variety of compliance and collection functions.

This is the recruiting/training and journey level in this series. Under close supervision, incumbents learn all phases of tax compliance, licensing, and law, rule, and regulation administration; and perform all aspects of compliance and collection work, including collection, registration, revocation, and criminal investigation.

## **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 on measuring competitively, relative job demands, each applicant's:

**Knowledge of:**

1. Methods and problems of organization, administration, and management.
2. Commercial law, business practices, and financial record keeping.

**Ability to:**

1. Apply the required knowledge.
2. Communicate effectively.
3. Interpret and apply provisions of the tax laws, rules, and regulations administered by the State Board of Equalization.
4. Analyze situations accurately and take effective action.
5. Use tact and good judgment in dealing with the public under stressful conditions.

## **ELIGIBLE LIST INFORMATION**

A departmental open eligible list for the **Business Taxes Representative** classification will be established for:

California Department of Tax and Fee Administration

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.

Veteran status is verified by the California Department of Human Resources (CalHR). Information on this program and the Veterans' Preference Application (Std. 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.

## TAKING THE EXAMINATION

We recommend using Chrome, Firefox, or Edge for optimal performance when accessing the examination.

[Take the Business Taxes Representative examination](#)

## TESTING DEPARTMENTS

California Department of Tax and Fee Administration

## CONTACT INFORMATION

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

### California Department of Tax & Fee Administration

Examination & Recruitment Section

California Department of Tax & Fee Administration

450 N Street, MIC 17

Sacramento, CA 95814

Email: [exams@cdtfa.ca.gov](mailto:exams@cdtfa.ca.gov)

### California Department of Human Resources

CalCareer Service Center

1810 16<sup>th</sup> Street

Sacramento, CA 95814

Phone: (866) 844-8671

Email: [CalCareer@CalHR.CA.GOV](mailto:CalCareer@CalHR.CA.GOV)

California Relay Service: 7-1-1 (TTY and voice)

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 California Department of Human Resources (CalHR) 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.