



STATE OF CALIFORNIA  
**Franchise Tax Board**

## **Compliance Representative, Franchise Tax Board**

**Exam Code: 7PB49**

**Department:** Franchise Tax Board

**Exam Type:** Departmental, Open

**Final Filing Date:** Continuous

### **CLASSIFICATION DETAILS**

**Compliance Representative, Franchise Tax Board – \$4,091.00 – \$6,336.00 per month**

[View the classification specification for the Compliance Representative, Franchise Tax Board classification.](#)

**If you tested for the Compliance Representative, FTB 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:**

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.

### **Either 1**

Six months of experience in the Franchise Tax Board performing tax compliance or debt collection duties as a Tax Technician, Range B, Franchise Tax Board.

### **Or 2**

One year of experience in the Franchise Tax Board performing tax compliance or debt collection duties in a class equivalent in level to Tax Program Technician I.

### **Or 3**

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

1. Management activities, as owner or manager of a business, in the marketing, distribution, and sale of merchandise, which requires broad public or customer contacts. or
2. Activities as a credit manager, loan officer, or collector with responsibilities involving the approval of loans or credit or the collection of delinquent accounts. or
3. Tax compliance or debt collection experience in a governmental agency comparable in responsibility to that of a Tax Technician, Franchise Tax Board, in the California state service.

**and**

**Education:** Equivalent to completion of 60 semester or 90 quarter units of college, which must include at least one course each in basic accounting or Federal or State taxation and business or commercial law. Students who have completed at least 30 semester or 45 quarter units of college will be admitted to the examination, but must produce evidence of completion of the 60 or 90 units before they can be considered eligible for appointment. (Applicants must indicate the following regarding the required courses: title, number of units, name of institution, and completion date.) Additional experience may be substituted for the required general education on the basis of one

year of experience being equal to 30 semester or 45 quarter units. No substitution is permitted for the specific course work required.

#### **Or 4**

Equivalent to graduation from college, which must include at least one course each in basic accounting or Federal or State taxation and business or commercial law; and one course in either economics, business administration, or public administration. (Registration as a senior in a recognized institution will admit applicants to the examination, but they must produce evidence of graduation or its equivalent before they can be considered eligible for appointment.) (Applicants must indicate the following regarding the required courses: title, number of units, name of institution, and completion date.)

Persons who will complete course work requirements outlined under Patterns 3 and 4 above 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**

#### **Compliance Representative, Franchise Tax Board**

Compliance Representatives, Franchise Tax Board, provide assistance to individuals, business entities, or taxpayers to ensure compliance with California laws, collect delinquent taxes or other debts, 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 debt collection or tax compliance, law, rule, and regulation administration; perform all aspects of compliance work; and perform technical, staff, or administrative functions related to the enforcement program. Incumbents may also act in a lead capacity for paraprofessional staff.

### **EXAMINATION SCOPE**

This examination consists of the following components:

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

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. 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. Basic accounting practices.
2. Types of business organizations.
3. Basic business practices and management
4. Commercial law.

**Ability to:**

1. Apply the required knowledge.
2. Communicate effectively.
3. Interpret and apply provisions of California laws, rules, and regulations administered by the Franchise Tax Board.
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 Compliance Representative, 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.

Veteran status is verified by the California Department of Human Resources (CalHR). Information on this program and the Veterans' Preference Application (Std. 1093) are 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 examination for the [Compliance Representative, Franchise Tax Board](#) classification.

## TESTING DEPARTMENTS

Franchise Tax Board

## CONTACT INFORMATION

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.