



Tax Compliance Representative

Exam Code: 7PB50

Department: Employment Development Department

Exam Type: Departmental, Open

Final Filing Date: Continuous

CLASSIFICATION DETAILS

Tax Compliance Representative – \$4,091.00 - \$6,336.00 per month

View [the Tax Compliance Representative 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 Compliance Representative

Either 1

One year of experience in the California state service performing tax compliance duties as a Program Technician II in the Employment Development Department, the Franchise Tax Board, or the Board of Equalization; **or**

One year of experience in the California state service performing Medi-Cal overpayment recovery duties as a Program Technician II in the Department of Health Services.

Or 2

Six months of experience in the California state service performing Medi-Cal overpayment recovery duties as a Management Services Technician, Range B, in the Department of Health Services.

Or 3

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

1. Management activities, as owner or manager of a business, in the marketing, distribution, or sale of merchandise, which requires broad public or customer contacts; **or**
2. Activities as a credit manager, loan officer, or field collector with responsibilities involving the approval of loans or credit or the collection of delinquent accounts; **or**
3. Tax compliance experience in a governmental agency. **and**

Education: Equivalent to completion of two years (60 semester hours or 90 quarter units) of college, which must include at least one course each in basic accounting and business or commercial law. Students in their second year of college will be admitted to the examination, but must produce evidence of completion before they can be considered eligible for appointment. (Applications 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 a year-for-year basis. 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; 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.) (Applications must indicate the following regarding the required courses: title, number of units, name of institution, and completion date.)

POSITION DESCRIPTION

Tax Compliance Representative

The Tax Compliance Representative ensures compliance with tax, registration and other laws, assists the taxpayer/debtor in complying with the laws and collects delinquent taxes and overpayments.

This is the recruiting, training, and first journey level. Under close supervision, learns the fundamentals of tax/Medi-Cal compliance, registration, and administration of the laws, rules, and regulations; assists in collecting delinquent taxes, benefit overpayments, fees, returns, or Medi-Cal overpayments; and participates in training to learn the work. As proficiency increases, incumbents independently perform all aspects of compliance and collection work, including collection, registration, revocation, and criminal investigation, and represent the department in small claims court.

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. Methods and problems of organization, administration, and management.
2. Commercial law, business practices, and financial record keeping.
3. Provisions of State and tax laws administered.
4. Rules of evidence, preparation of evidence, and court procedure.
5. Interviewing techniques.
6. Methods used by violators in evading tax liability.
7. Investigation techniques and sources of information used in locating persons.
8. Methods used and remedies available for the collection of taxes.
9. Functions of Federal, State, and local tax, regulatory, and law enforcement agencies.

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 **Tax Compliance Representative** classification will be established for:

Employment Development Department

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.

TAKING THE EXAMINATION

Take [the Tax Compliance Representative examination](#).

TESTING DEPARTMENTS

Employment Development Department

CONTACT INFORMATION

California Department of Human Resources
CalCareer Service Center
1810 16th Street
Sacramento, CA 95814
Phone: (866) 844-8671
Email: 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 Employment Development Department 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.