



NOTICE OF UPDATE TO EXAMINATION CUTOFF DATES

EXAMINATION TITLE: TAX PROGRAM TECHNICIAN I, FRANCHISE TAX BOARD

Please note the Tax Program Technician I Exam cutoff dates have been updated. Examination cutoff dates will be at the end of each quarter starting with the first quarterly cutoff of June 30, 2020. Updated cutoff dates: June 30th, September 30th, December 31st and March 31st.

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CUT-OFF DATES TO SUBMIT AN APPLICATION WILL BE:

QUARTERLY: December 31st, March 31st, June 30th, September 30th

If conditions warrant, additional cutoff dates may be added.

Additional cut-off date: August 31, 2021

In order to participate in the Tax Program Technician I (TPT I) examination, candidates must submit a paper application to Franchise Tax Board. This application will be used for exam purposes only and will not be combined with any hiring/recruitment effort. Those that have already submitted an application for a hiring/recruitment effort will be required to submit an additional application to participate in the TPT I exam.

Candidates qualifying by means of education, must submit official or unofficial transcripts identifying completed college semester/quarter units or degree information with their application to the exam. Candidates who meet the minimum qualifications for this examination will be mailed an acceptance letter, which will also contain an informational insert. The informational insert will provide a Survey Monkey website to access the online Qualifications Assessment (QA) examination. Candidates will be provided a personal identification number, used to track those that have been accepted for each examination administration. Candidates will be given a specific timeframe to complete the examination.

It is the candidate's responsibility to read the informational insert that is enclosed with their acceptance notice, which provides specific instructions and a timeframe to complete the examination. It is also the candidate's responsibility to contact the Franchise Tax Board's Examination Unit if they do not receive a progress notice within 3 weeks of the cut-off date.

Candidates that received a rejection notice please reach out to the examination unit for additional information ExamAnalysts@ftb.ca.gov or by calling 916-845-3608.



STATE OF CALIFORNIA
Franchise Tax Board

STATE OF CALIFORNIA

TAX PROGRAM TECHNICIAN I

DEPARTMENTAL OPEN EXAMINATION

Location: Sacramento

CONTINUOUS FILING

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?

The Tax Program Technician I examination is now available for CONTINUOUS filing. Exam applications will be reviewed after each cut-off date. Acceptance information will be mailed within three weeks of the cut-off date. If you have taken the most recent examination, you do not need to apply, as your current list eligibility remains valid for 12 months. You must wait 9 months from the eligible list date to retake the examination.

Candidates 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 by the cut-off date.

Please read the Frequently Asked Questions at the end of this bulletin for additional information.

FILING INSTRUCTIONS

CUT-OFF DATES TO SUBMIT AN APPLICATION WILL BE:

QUARTERLY: December 31st, March 31st, June 30th, September 30th

If conditions warrant, additional cutoff dates may be added.

Additional cut-off date: August 31, 2021

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

Applicants must submit a paper application to the Franchise Tax Board 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.

In order to participate in the Tax Program Technician I (TPT I) examination, candidates must submit a paper application to Franchise Tax Board. This application will be used for exam purposes only and will not be combined with any hiring/recruitment effort. Those that have already submitted an application for a hiring/recruitment effort will be required to submit an additional application to participate in the TPT I exam.

If signatures are missing on your application and not re-submitted by the close date of the exam, candidates may not be eligible for the exam. It is also the candidate's responsibility to follow up with the examination unit to make sure signed applications were received.

Applications (STD.678) must be **POSTMARKED** no later than the cut-off date. Applications postmarked, personally delivered, or received via interoffice mail after the cut-off date will be held for the next administration of the examination. Applications will be accepted on a continuous basis. Testing is considered continuous, new cut-off dates may be set at any time as departmental needs warrant. Each new cut-off date will be publicized to ensure that applications have adequate time to complete and submit an application.

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.

SPECIAL TESTING ARRANGEMENTS

If you have a disability and need special assistance or special testing arrangements, contact Franchise Tax Board (FTB), Examination 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

\$3,514.00 - \$4,403.00

The salaries used in this bulletin are the latest available from CalHR, but may not reflect all of the pay raises granted recently. Applicants should verify the salary levels with the department's personnel office before making any commitments.

ELIGIBLE LIST INFORMATION

A departmental, open 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 must retake the examination to reestablish eligibility.

Once you have taken this examination, you may not retake it for **9 months**.

REQUIREMENTS FOR ADMITTANCE TO THE EXAMINATION

All applicants must meet the education and/or experience requirements as stated on this examination bulletin by the cut-off date. Your signature on your application indicates that you have read, understood, and possess the qualifications required. It is the candidate's responsibility to contact the Franchise Tax Board's Examination Unit, 916-845-3608, three weeks after the cut-off date if he/she has not received a progress notice.

Applications/resumes **MUST** contain the following information: "to" and "from" dates (month/day/year), hours per week and/or 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: 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.)

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

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.

Positions exist in Sacramento, CA.

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 AND 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.

SELECTION PLAN

Candidates who meet the minimum qualifications for this examination will be mailed an acceptance letter, which will also contain an informational insert. The informational insert will provide a Survey Monkey website address to access the online Qualifications Assessment (QA) examination. Candidates will be given a specific timeframe to complete the examination.

It is the candidate's responsibility to read the informational insert that is enclosed with their acceptance notice, which provides specific instructions and a timeframe to complete the examination. It is also the candidate's responsibility to contact the Franchise Tax Board's Examination Unit by emailing ExamAnalysts@ftb.ca.gov or by calling 916-845-3608, if they do not receive a progress notice within 3 weeks of the cut-off date.

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. Knowledge of the structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar.
2. Knowledge of basic customer service skills to effectively represent FTB while assisting customers.
3. Knowledge of principles and processes for providing customer service, including customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction.
4. Knowledge of departmental and unit procedures and guidelines to complete workloads in compliance with FTB standards.
5. Knowledge of current office methods, technologies, and equipment.
6. Knowledge of basic mathematical operations (e.g. addition, subtraction, multiplication, division, percentages, order of operations) to review and process workload.
7. Knowledge of problem-solving techniques and processes to identify, facilitate, and resolve problems and issues related to the completion of work assignments.
8. Knowledge of the internet, email, basic PC functions, and software programs to conduct work related activities.

Skill to:

1. Skill to write memos and/or letters using proper grammar, punctuation, and sentence structure.
2. Skill to provide clear and accurate instructions and directions to individuals with varying levels of understanding.
3. Skill to verbally explain and clarify policies, procedures, and issues for audiences with varying levels of understanding.
4. Skill to prioritize assignments and projects to ensure completion within established timeframes and by expected deadlines.
5. Skill to identify information, materials, and resources needed to complete a project or assignment.
6. Skill to comprehend and interpret information (e.g., laws and regulations), technical data and materials; including standards, procedures, and policies in order to apply information.
7. Skill to extract specific, relevant data and information from a larger body of materials.
8. Skill to make appropriate decisions based upon the facts and information available.

Ability to:

1. Ability to write effectively using the English language to convey information.
2. Ability to review forms for content, accuracy and completeness.
3. Ability to verbally communicate using the English language to effectively convey information.
4. Ability to work cooperatively, respectfully and productively as a member of a team to achieve a common goal.
5. Ability to accept constructive feedback regarding work product and practices to continually improve work performance.
6. Ability to establish and maintain cooperative and professional relations with other departmental staff, outside agency personnel, contractors, customers, and/or the public.
7. Ability to listen carefully and give full attention to what other people are saying, taking time to understand the points being made, asking questions when appropriate without interruption.
8. Ability to be objective and flexible in adapting to changes in priorities, work assignments, and other interactions that may impact pre-established courses of action for completing projects and assignments.
9. Ability to work under the pressure of tight timelines when completing projects or assignments.
10. Ability to multi-task and manage multiple changing, complex and/or competing priorities to complete tasks in appropriate timeframes.
11. Ability to organize and manage time to maintain workflow and meet deadlines.
12. Ability to work independently on projects or assignments without close supervision or detailed instructions.
13. Ability to apply policies and procedures in the completion of work assignments.
14. Ability to read written documents of varying complexity including departmental policy manuals and guides, legislative mandates, instructional guides, written correspondence, or analytical reports.
15. Ability to interpret tax laws, rules and regulations to provide accurate information to taxpayers and/or business entities.
16. Ability to assimilate information and data from multiple sources for effective review and response.
17. Ability to read and interpret written and/or numerical data to provide information to the public, FTB staff and other governmental agencies.
18. Ability to evaluate situations and information using logic to address work-related issues and problems.
19. Ability to accurately and quickly enter data into a computerized database.
20. Ability to perform basic mathematical computations (e.g. addition, subtraction, multiplication, division, ratios, percentages) to verify or adjust numerical information (e.g., taxpayer information and claims).
21. Ability to effectively use a calculator for performing basic mathematical computations (e.g. addition, subtraction, multiplication, division, percentages) in order to complete job assignments.
22. Ability to present numerical data in a clear and logical format (e.g., tables, tax computation).
23. Ability to determine the accuracy of various mathematical calculations.
24. Ability to interpret numerical data accurately.
25. Ability to recognize potential conflicts/problems in the work environment and know where to direct concerns.
26. Ability to maintain confidentiality to ensure compliance with the applicable laws related to taxpayer privacy (e.g., the information practices act).
27. Ability to recognize questions or situations outside the employee's area of responsibility or knowledge and refer to appropriate sources for resolution.
28. Ability to use logic and reasoning to identify the strengths and weaknesses of alternative approaches, solutions, or conclusions to allow for an effective resolution of the problem.
29. Ability to provide one-on-one training to transfer specific knowledge and/or skills.
30. Ability to learn to utilize personal computer systems and software applications in the performance of work.

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 be awarded in this examination, pursuant to Government Code Section 18973.1 and 18973.5, effective January 1, 2014, as follows:

1. Any veteran, widow or widower of a veteran, or spouse of a 100 percent disabled veteran, who achieves a passing score in an entrance examination, shall be ranked in the top rank of the resulting eligibility list. Any veteran who has been dishonorably discharged or released is not eligible for veteran's preference.
2. An entrance examination is defined, under the law, as any open competitive examination.
3. Veterans Preference is not granted once a person achieves permanent civil service status.

Veterans' Preference will be given if a passing score is achieved on an open examination. He or she shall be ranked in the top rank of the resulting eligibility list.

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 by emailing ExamAnalysts@ftb.ca.gov.

DISCLAIMER

Please click on the link below to review the official California Department of Human Resources class specification: <http://www.calhr.ca.gov/state-hr-professionals/Pages/9587.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

Frequently Asked Questions (FAQs)

Tax Program Technician I (TPT I) Qualifications Assessment (QA) Examination

What is a Qualifications Assessment (QA) examination?

A Qualifications Assessment (QA) examination is a testing format which evaluates a candidate's job-related experience and accomplishments, education (if applicable) and the extent to which they possess the knowledge, skills and abilities (KSAs) required for success on the job.

What is a Continuous Filing examination?

Continuous filing allows for applications to be submitted at any time, regardless of when the bulletin was originally posted. Applications will be reviewed after each identified cut-off date. Candidates that are successful with the examination will be merged/added onto the existing list, multiple times throughout the year. Cutoff dates will begin on a quarterly basis, starting with June 30th 2020 as the first quarterly cutoff date. Quarterly dates have been updated to March 31th, June 30th, September 30th, and December 31st. Applications will be reviewed after each identified cut-off date. Candidates that are successful with the examination will be merged/added onto the existing list, multiple times throughout the year.

How was the decision made to administer the Tax Program Technician I (TPT I) examination for Continuous Filing, instead of identifying a final file date?

In an effort to merge/add additional candidates to the examination list more frequently and to assist with aligning the examination with the department's TPT I recruitment efforts, the FTB Exams Unit has made the decision to allow application submissions for this examination on a quarterly filing basis. Quarterly filing allows for more flexibility to meet departmental recruitment needs.

What is a cut-off date?

A cut-off date can either be an identified day(s) of the month or a specific calendar date. For this exam, the cut-off date will be end of the month, starting with Tuesday, 6/30/2020, unless otherwise posted. Applications to the examination that are received on or before the posted cut-off date on the bulletin will be considered for that examination administration. Any applications received after the cut-off date will be held for the next administration (cut-off date) of the examination. Testing is considered quarterly, as new cut-off dates may be set at any time as departmental needs warrant. Each new cut-off date will be publicized to ensure that applicants have adequate time to complete and submit an application. All applicants must meet the education and/or experience requirements for this examination by the cut-off date.

Will a new exam bulletin be posted every month for each cut-off?

No. This exam bulletin will be active/available indefinitely on the CalCareer website, unless conditions warrant a change to the bulletin's information. It is the candidate's responsibility to review the bulletin in its entirety for examination related information.

If I currently have list eligibility from a prior TPT I examination administration, is it necessary to apply again for this examination?

Yes. It is recommended to apply to the examination after every 9 months to maintain your eligibility. 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 their list eligibility. Candidates will not be permitted to take the exam sooner than 9 months from their previous test date.

How will I access the examination?

Candidates who meet the minimum qualifications for this examination will be mailed an acceptance letter, which will also contain an informational insert. The informational insert will provide a Survey Monkey website to access the online Qualifications Assessment (QA) examination. Candidates will be provided a personal identification number, used to track those that have been accepted for each examination administration. Candidates will be given a specific timeframe to complete the examination.

It is the candidate's responsibility to read the informational insert that is enclosed with their acceptance notice, which provides specific instructions and a timeframe to complete the examination. It is also the candidate's responsibility to contact the Franchise Tax Board's Examination Unit if they do not receive a progress notice within 3 weeks of the cut-off date.

Do I need an email address to take this exam?

No. An email address is no longer required to take the exam, as accepted candidates will be provided a personal identification number. However, providing an email address on the examination application is encouraged, as it is a helpful form of communication.

Will I be able to start the QA examination, and then save it to complete at a later time?

No. Candidates will NOT be able to start the QA examination, then save it and complete it at a later time. Examination results will only be recorded if the examination is fully completed by the candidate. The website provided to take the examination does not have the ability to save incomplete responses. Candidates will have access to the website 24 hours per day. However, there will be a limited period that the candidates will have access to the examination (i.e. the candidates will be able to access the examination for only the allowed time period provided).

Do I need to complete the QA examination on a single computer?

Yes. Candidates must complete the examination in one sitting by using the same computer, as the examination website will not save any responses until the candidate officially submits their exam. Responses will not be saved or scored if the candidate does not complete the examination. All responses must be completed from a single computer.

How long will it take to complete the QA examination?

It will take approximately 1 to 3 hours, depending on the candidate, to complete the QA examination.

How long will I have to complete the QA examination?

Accepted candidates will receive their acceptance letter and informational insert containing the examination website, by mail. Candidates will have a set timeframe to complete the QA examination.

Will current FTB and State of California employees be given time to complete the QA examination during State time?

Candidates may use a state computer to take the examination by making arrangements with their supervisor. Supervisors/managers are encouraged to allow reasonable time for candidates to complete their examination based on business area needs.

What should I do if I am on vacation during the week when the examination will be available for accepted candidates to take the exam?

Candidates who will be on vacation during the week when the examination will be available to accepted candidates must notify the Exams Unit in writing prior to the timeframe allowed to take the examination. The notification must include the dates of the approved time off and provide documentation (i.e. timesheet).

How was the decision made to administer the Tax Program Technician I (TPT I) examination as a QA?

Franchise Tax Board (FTB) management made the decision to administer the TPT I examination in a QA testing format based on the results of a job analysis of the TPT I classification and current best practices with regard to examination administration. The job analysis identified the critical tasks and KSAs of the TPT I classification. The job analysis was conducted with subject matter experts who are familiar with the TPT I job.

How will the TPT I QA differ from the FTB on-line examinations administered by CalHR?

	FTB On-line Examinations Administered by CalHR (e.g. Tax Auditor, Compliance Representative, Tax Technician, etc.)	FTB On-line QA Examinations Administered by FTB (e.g. Administrator, Operations Specialist, Program Specialist, Tax Program Technician Series, etc.).
Examination Type	Open examinations for any eligible candidate.	Identified examinations as Open for any eligible candidate, or identified examinations as Promotional for FTB employees and eligible Veterans and Legislative employees.
Application Period	Candidates can apply for the examination 365-days a year.	If continuous, candidates can apply for the examination 365-days a year. Applications will be reviewed after each cut-off date. If a final file date, candidates can apply during the specified filing period/timeframe.
Requirements	Candidates self-certify that they meet the examination entrance requirements, which are referred to as Minimum Qualifications (MQs) - MQs are verified during the hiring process.	FTB Exam staff review all applications that are submitted by the cut-off date or final file date. Minimum qualifications are verified prior to candidates taking the exam.
Examination Access	Examination administered through CalHR's website.	Examination website is provided by mail or email to accepted candidates, as specified on the Exam Bulletin.
Results	Examination results immediately available after submitting examination.	Examination results are mailed to candidates 4-6 weeks after completing the examination.

How should I prepare for a QA examination?

The QA examination is based on an assessment of the candidate's past experience and accomplishments. In order to prepare for the examination, candidates may want to:

- Review the Validated Knowledge, Skills, and Abilities listed on the exam bulletin for the Tax Program Technician I, and also the [Classification Specification](#) for the Tax Program Technician Series
- Update your work history/resume
- Complete a list of current/past major projects and assignments and identify your role, level of participation and responsibility
- Be prepared to provide the names, titles, phone numbers, and email addresses of your current and former supervisors
- Ensure that you have a valid and current postal and email address to receive the examination link

In addition, when taking the QA examination, the candidate should read each question carefully and answer each question accurately.

What types of experience can I include when responding to questions in the QA examination?

The candidate may include all relevant experience (paid, volunteer, school, internships, etc.) and accomplishments when responding to the questions in the QA examination.

Will the information that I provide in the QA examination be verified?

Yes. It is a violation of Section 18935 of the California Government Code "to practice any deception or fraud" on an application, assessment, or any other information that a candidate submits in order to obtain employment eligibility with the State. Please be advised that FTB is developing a process to verify that a candidate's responses to the QA examination are accurate. Candidates who provide false or misleading information will be disqualified.

Still have questions?

Feel free to contact the Examination Unit at 916.845.3608 or email ExamAnalysts@ftb.ca.gov.