



## **Tax Technician 2**

**Exam Code: 9PB61**

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

**Exam Type:** Departmental, Open

**Final Filing Date:** Continuous

### **CLASSIFICATION DETAILS**

**Tax Technician 2** – \$3,449.00 - \$4,322.00 per month.

View [the Tax Technician 2 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 **“twelve (12)”** 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 Technician 2 Either I**

In the California state service, either: (a) six months of experience performing the duties of a Tax Technician I, Board of Equalization, Range B; or (b) one year of experience performing the duties at a level of responsibility not less than that of Tax Technician, Board of Equalization, Range A, which provides a familiarity with the various programs administered by the Board of Equalization.

### **Or II**

Two years of experience in a governmental or private agency performing duties which provide a basic familiarity with the regulations and policies governing the various tax programs administered by the Board of Equalization. (Experience in California state service applied toward this requirement must include at least one year in a class with a level of responsibility not less than that of Tax Technician I, Board of Equalization, Range A, which provides a familiarity with the various tax programs administered by the Board of Equalization.)

## **POSITION DESCRIPTION**

### **Tax Technician 2**

This is the full journey level of the series. Positions allocated to this level are distinguished from positions at the first journey level in that incumbents perform the full range of duties under general supervision, exercise a higher degree of judgment and initiative than expected at the lower level and are responsible for the more complex technical duties. Incumbents may: perform the full range of taxpayer interviewer duties or tax return review and verification duties; review and approve or deny routine claims for refunds; perform registration, account maintenance and close-out duties for the special and property tax programs; process escrow clearances and issue release; adjust and verify statistical information and prepare reports; maintain and update maps; do set-up work for appraisers; estimate values of aircraft and vehicles; perform cashier duties; and provide advisory services to the public.

## **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. Modern office methods and procedures
2. Business terminology as it relates to the tax programs administered by the Board of Equalization
3. Rules, regulations, general organization, and procedures of the Board of Equalization
4. Grammar, spelling, punctuation, and modern English usage
5. Arithmetic
6. A working knowledge of the laws, rules, regulations, policies, and procedures administered by the Board of Equalization

**Ability to:**

1. Communicate at a level required for successful job performance
2. Perform mathematical computations
3. Apply laws, rules, and regulations
4. Interpret and use reference material
5. Follow instructions
6. Use tact and good judgment in dealing with fellow employees, the public, and other governmental entities
7. Interpret written and numerical data
8. Learn to utilize personal computer systems and software applications in the performance of technical work
9. Communicate effectively over the telephone and in person
10. Accept increasing responsibility
11. Be flexible and adapt to changes in procedures and/or workload
12. Apply and interpret well-defined sections of the laws, rules, and regulations governing the various tax programs administered by the Board of Equalization
13. Recognize questions and/or situations outside of the employee's area of responsibility or knowledge and refer them to the appropriate person(s)
14. Independently research problems and take or recommend action

- 15. Function effectively under pressure
- 16. Work independently

## ELIGIBLE LIST INFORMATION

A departmental, open eligible list for the **Tax Technician 2** 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.

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.

## EXAMINATION INFORMATION

[Preview of the Tax Technician 2 Training and Experience Evaluation](#)

## PREPARING FOR THE EXAMINATION

Here is a list of suggested resources to have available prior to taking the exam.

**Employment History:** Employment dates, job titles, organization names and addresses, names of supervisors or persons who can verify your job responsibilities, and phone numbers of persons listed above.

**Education:** School names and addresses, degrees earned, dates attended, courses taken (verifiable on a transcript), persons or office who can verify education, and phone numbers of persons or offices listed above.

**Training:** Class titles, certifications received, names of persons who can verify your training, and phone numbers of persons listed above.

## TAKING THE EXAMINATION

Take [the Tax Technician 2 examination](#).

## TESTING DEPARTMENTS

State of California (all State of California departments)

## CONTACT INFORMATION

If you have any ***technical*** questions concerning this examination bulletin, please contact:

California Department of Human Resources  
Attn: Examination Services  
1515 S Street  
Sacramento, CA 95811  
Phone: 1-866-844-8671  
California Relay Service: 1-800-735-2929 (TTY), 1-800-735-2922 (Voice)

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 and Fee Administration Examination and Recruitment Section

[Exams@cdtfa.ca.gov](mailto:Exams@cdtfa.ca.gov)

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 Tax and Fee Administration 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.