



STATE OF CALIFORNIA  
Franchise Tax Board

STATE OF CALIFORNIA

## Tax Program Technician II

DEPARTMENTAL PROMOTIONAL EXAMINATION

Location: Sacramento

**Final Filing Date: January 18, 2024**

### 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 II examination is now offered multiple times a year. 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.**

Applicants 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.

This is a promotional examination for Franchise Tax Board (FTB). In order to take this examination:

1. Applicant must have a permanent civil service appointment without a break in service, with the Franchise Tax Board, by the final filing date; **or**
2. Applicant must be a current or former employee of the Legislature for two or more years as defined in Government Code Section 18990; **or**
3. Applicant must be a current or former non-elected exempt employee of the Executive Branch for two or more consecutive years as defined in Government Code Section 18992; **or**
4. Applicant must be a person retired from the United States Military, honorable discharged from active duty with a

Bulletin Release Date: **December 26, 2023**

**4FT06 –CX93 – 9588**

service-connected disability; or honorably discharged from active duty as defined in Government Code Section 18991. **Veterans must provide a copy of their DD214 for entrance requirements.** Please attach your DD214 to your application. **Veterans' preference will not be granted in promotional examinations.**

For applicants under items 2, 3, or 4, if promotional examinations are given by more than one department for the same classification, the applicant must select one department in which to compete. Refer to the General Information, Promotional Examinations Only section of this bulletin for other eligibility requirements. Under certain circumstances, former FTB employees may be allowed to compete under the provisions of Rule 235.

## FILING INSTRUCTIONS

**FINAL FILING DATE TO SUBMIT AN APPLICATION:** January 18, 2024

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

In the "Examination(s) or Job Titles(s) for which you are applying" section of the STD 678 you must clearly indicate what examination you are applying to. Applications not identified as exam applications may not be accepted.

**Unfortunately Electronic/Email applications are not an option when applying for exams.**

Applications can be filed either:

**In Person:**

Franchise Tax Board  
9646 Butterfield Way  
Sacramento Bldg., Examination Unit OR  
Welcome Center  
Sacramento, CA 95827

**By Mail:**

Franchise Tax Board  
ATTN: Examination Unit  
P.O. Box 550  
Sacramento, CA 95812-0550

\*Drop off at Welcome Center in Main Lobby (may be non-operational on weekends and holidays)\*

**APPLICATIONS MUST CONTAIN ORIGINAL SIGNATURES AND MUST BE SUBMITTED TO THE ADDRESS INDICATED ABOVE.**

If signatures are missing on your application and not re-submitted by the close date of the exam, scores will not be recorded and candidates will have to wait 9 months before being eligible to re-take the exam. It is also the candidate's responsibility to follow up with the examination unit to make sure sign applications were received.

Applications (STD.678) must be **POSTMARKED** no later than the final filing date. Applications postmarked, personally delivered, or received via interoffice mail after the final filing date will not be accepted. **Unfortunately Electronic/Email applications are not an option when applying for exams.**

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.

**NOTE:** The Qualification Assessment (QA) exam link will be sent to your FTB email address from Survey Monkey. All examination notifications, with the exception of the QA email link, will be sent by mail. Any requests for alternative email addresses must be requested by contacting the Examination Unit.

## SELECTION PLAN

It is anticipated that candidates who meet the minimum qualifications for this examination will be sent an email the **week of February 19, 2024**, which will contain the instructions and the link to complete the online Qualifications Assessment (QA)

examination. It is the candidate's responsibility to read the letter that is enclosed with their acceptance notice which provides specific instructions/dates about the QA link. It is also the candidate's responsibility to contact Franchise Tax Board's Examination Unit at (916) 845-3608 or email [ExamStaff@ftb.ca.gov](mailto:ExamStaff@ftb.ca.gov) if they have not received the QA link by the date indicated on the letter.

## SPECIAL TESTING ARRANGEMENTS

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

**\$4150.00 - \$5199.00**

## ELIGIBLE LIST INFORMATION

A departmental, promotional 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 will be able to retake the exam (Qualifications Assessment) after 9 months from the last examination taken to reestablish list eligibility. Once you have taken this examination, you may not retake it for **9 months**.

## REQUIREMENTS FOR ADMITTANCE TO THE EXAMINATION

**NOTE:** All applicants must meet the education and/or experience requirements as stated on this examination bulletin by the final filing date. Your signature on your application indicates that you have read, understood, and possess the qualifications required.

Applications/resumes **MUST** contain the following information: "to" and "from" dates (month/day/year), time base, civil service class title(s), range (if applicable), and duties performed. 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 performing duties equivalent

to those of a Tax Program Technician I, Franchise Tax Board, which provides knowledge of the regulations and policies governing the tax and nontax programs of the Franchise Tax Board.

## OR II

Experience: Three 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 in a class with a level of responsibility not less than a Tax Program Technician I, Franchise Tax Board, which provides knowledge of the various tax and nontax programs administered by the Franchise Tax Board.) (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](http://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 advanced journey level of the series. Under general direction and with little day-to-day supervision, incumbents serve as the expert staff resource and are independently responsible for the most difficult and complex work assignments in the areas of public service, audit, collections, account resolution and transactions, and technology applications. Incumbents may act as a resource to management and staff for more complex workload assignments and tasks, such as assisting with complex account resolution and providing support to help desks. Incumbents may also serve as a team

leader or technical expert for special or difficult projects, and act as lead for first-line supervisors in routine settings over Tax Program Technicians I, Franchise Tax Board.

**Positions exist in Sacramento.**

## 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 OR 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.

## 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. The structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar.
2. Basic customer service skills to effectively represent FTB while assisting customers.
3. Principles and processes for providing customer service, including customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction
4. Current office methods, technologies, and equipment.
5. Basic mathematical operations (e.g. addition, subtraction, multiplication, division, percentages, order of operations) to review and process workload.
6. Decision-making techniques and processes to identify and make appropriate decisions from a variety of alternatives.
7. Problem-solving techniques and processes to facilitate the identification and resolution of problems and issues related to the completion of work assignments.
8. Provisions of the rules, regulations, organization, and procedures of FTB to educate taxpayers and perform necessary job requirements.
9. Applicable tax or nontax laws to ensure effective completion of job assignments.
10. One or more of the functions, applications, or processes administered and performed by the Franchise Tax Board.
11. State tax laws and/or corporate laws to educate taxpayers and/or perform necessary job requirements.
12. Departmental and unit procedures and guidelines to complete workloads in compliance with FTB standards.
13. The internet, email, and other basic PC functions to conduct work related activities.
14. Word processing software programs (e.g., Microsoft Word) to complete work projects, assignments,

- correspondence etc.
15. Spreadsheet software programs (e.g., Microsoft Excel) to complete work projects, assignments, correspondence, etc.
  16. Various programs (e.g., ADINT, ARCS, TI, etc.) in order to conduct account related activities.

**Ability to:**

1. Write memos and/or letters using proper grammar, punctuation, and sentence structure.
2. Write reports, policies, and/or procedures using proper grammar, punctuation, and sentence structure.
3. Edit memos and/or letters for proper content, format, grammar, punctuation, and sentence structure.
4. Edit reports, policies, and/or procedures for proper content, format, grammar, punctuation, and sentence structure.
5. Write effectively using the English language to convey information.
6. Review forms for content, accuracy and completeness.
7. Verbally communicate using the English language to effectively convey information to individuals with varying levels of understanding.
8. Work cooperatively and productively as a member of a team to achieve a common goal.
9. Explain provisions of governmental, tax or non-tax rules, regulations, and departmental procedures and policies.
10. Accept constructive feedback regarding work product and practices to continually improve work performance.
11. Establish and maintain cooperative and professional relations with other departmental staff, outside agency personnel, contractors, customers, and/or the public.
12. Listen carefully and give full attention to what other people are saying, taking time to understand the points being made, and asking questions when appropriate without interruption.
13. Build consensus and agreement to resolve issues involving differing opinions and viewpoints.
14. Serve as a team leader to direct team members to achieve desired goals.
15. Provide clear and accurate instructions and directions to individuals with varying levels of understanding.
16. Verbally explain and clarify policies, procedures, and issues for audiences with varying levels of understanding.
17. Extract specific, relevant data and information from a larger body of materials.
18. Read and interpret written and/or numerical data to provide information to the public, FTB staff and other governmental agencies.
19. Analyze and evaluate situations and information using logic to address work-related issues and problems.
20. Accurately and quickly enter data into a computerized database.
21. Perform basic mathematical computations (e.g. addition, subtraction, multiplication, division, ratios, percentages) to verify or adjust numerical information (e.g., taxpayer information and claims).
22. Effectively use a calculator for performing basic mathematical computations (e.g. addition, subtraction, multiplication, division, percentages) in order to complete job assignments.
23. Present numerical data in a clear and logical format (e.g., tables, tax computation).
24. Determine the accuracy of various mathematical calculations.
25. Interpret and analyze numerical data accurately.
26. Recognize potential conflicts/problems in the work environment and know where to direct concerns.
27. Make appropriate decisions based upon the facts and information available.
28. Maintain confidentiality to ensure compliance with the applicable laws related to taxpayer privacy (e.g., the information practices act).
29. Recognize questions or situations outside the employee's area of responsibility or knowledge and refer to appropriate sources for resolution.
30. 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.
31. 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.
32. Work under the pressure of tight timelines when completing projects or assignments.

33. Multi-task and manage multiple changing, complex and/or competing priorities to complete tasks in appropriate timeframes.
34. Organize and manage time to maintain workflow and meet deadlines.
35. Prioritize assignments and projects to ensure completion within established timeframes and by expected deadlines.
36. Identify information, materials, and resources needed to complete a project or assignment.
37. Work independently on projects or assignments without close supervision or detailed instructions.
38. Apply policies and procedures in the completion of work assignments.
39. Read written documents of varying complexity including departmental policy manuals and guides, legislative mandates, instructional guides, written correspondence, or analytical reports.
40. Comprehend and interpret information (e.g., laws and regulations), technical data and materials; including standards, procedures, and policies in order to apply information.
41. Interpret tax laws, rules and regulations to provide accurate information to taxpayers and organizations.
42. Assimilate information and data from multiple sources for effective analysis and response.
43. Utilize personal computer systems and software applications in the performance of work.
44. Utilize spreadsheet software programs (e.g., Microsoft Excel) to complete work projects and assignments.
45. Use word processing software (e.g., Microsoft Word) to develop written documents, such as memos, letters, and reports.

## 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 not be granted in the examination, as it does not meet the requirements to qualify for Veterans' Preference.

## 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 [ExamStaff@ftb.ca.gov](mailto:ExamStaff@ftb.ca.gov).

## DISCLAIMER

Please click on the link below to review the official California State Personnel Board 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](http://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](http://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](http://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](http://www.ftb.ca.gov)