



STATE OF CALIFORNIA

## Legal Assistant

### DEPARTMENTAL PROMOTIONAL EXAMINATION

Location: Sacramento

Final Filing Date: January 25, 2016

#### MISSION STATEMENT

**Mission of the Franchise Tax Board:** Our mission is to provide the services and information to help taxpayers file accurate and timely tax returns and pay the proper amount owed. To accomplish this mission, we develop knowledgeable and engaged employees, administer and enforce the law with fairness and integrity, and responsibly manage the resources allocated to us.

#### 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?

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 service-connected disability; or honorably discharged from active duty as defined in Government Code Section

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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 25, 2016

Applications (STD. 678) are available at CalHR's website [www.jobs.ca.gov](http://www.jobs.ca.gov) or FTB's website at [www.ftb.ca.gov](http://www.ftb.ca.gov).

Applications can be filed either:

**In Person:**

Franchise Tax Board  
9646 Butterfield Way  
Sacramento Bldg., Exam/Certification Unit  
Sacramento, CA 95827

**By Mail:**

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

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

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.

## 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

**\$3,540.00 - \$4,432.00**

## ELIGIBLE LIST INFORMATION

A departmental, promotional eligible list will be established for the Franchise Tax Board. The list will be abolished 12 months after it is established unless the needs of the service and/or conditions of the list warrant a change in this period.

## 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), 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

**Education:** Successful completion of six semester units of paralegal or undergraduate legal courses, with at least three units of which must be in legal research. (Candidates who have completed three semester units of paralegal course work necessary to fulfill the education requirement will be admitted to the examination, but they must submit evidence of completion of the required six units before they can be considered for appointment.) and Either I Experience: Two years of experience in the California state service as a Senior Legal Typist, Range B; Legal Secretary, or other classification with law-related duties, involving the review, preparation, or interpretation of legal documents or involving the conduct of investigations or studies leading to legal actions.

### OR II

**Experience:** Three years of responsible experience as a law clerk or legal secretary in a law firm, corporate law office, governmental or public law office, non-profit organization, educational institution, court, or other entity under the direction and supervision of a licensed attorney or judicial officer. Academic education above the twelfth grade may be substituted for one year of the required experience on the basis of either (a) one year of general education being equivalent to three months of experience, or (b) two years of education in a recognized attorney assistant program in probate, tax law, labor law, corporate law, litigation, or other law-related areas being equivalent to one year of experience.

**NOTE:** Qualifying experience may be combined on a proportionate basis if the requirements stated above include more than one pattern and are distinguished as "Either I," "or II," "or III," etc., unless otherwise stated.

### 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

Under the immediate direction, control, and responsibility of an attorney, a Legal Assistant performs a wide variety of paralegal duties and does other related work.

**Position (s) exists in Sacramento.**

## EXAMINATION INFORMATION

### **Qualifications Appraisal Panel Interview -- Weighted 100%**

This examination will consist of a Qualifications Appraisal Panel Interview. In order to be placed on the eligible list, a minimum rating of 70% must be attained in the interview. The first portion of the interview may consist of a structured exercise that tests the Knowledge, Skills, Abilities, and Personal Characteristics required to perform the work done by a Legal Assistant.

**CANDIDATES WHO DO NOT APPEAR FOR THE INTERVIEW 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

It is anticipated interviews will be held in **March 2016**. You will be contacted by mail with the specific date(s). Interviews will be held in **Sacramento**.

## 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. Legal concepts and terminology to assist and support attorneys in representing Franchise Tax Board.
2. Legal principles to assist and support attorneys in representing Franchise Tax Board.
3. Legal concepts and terminology to independently prepare appeal briefs to State Board of Equalization (SBE).
4. Procedures to assist and support attorneys in representing Franchise Tax board.
5. Legal reference material to conduct legal research including computer databases (i.e. internet, Lexis, etc.) and library resources.
6. Communication skills including grammar, punctuation, spelling, sentence and paragraph structure, organization and business writing using appropriate vocabulary.
7. Paralegal duties such as preparing common types of legal and other documents (i.e. briefs, correspondence,

and legal memoranda).

8. Personnel Computer (PC) or laptop and peripheral computer hardware devices such as flash drives, CDs, DVDs, and digital scanners to accomplish task.
9. Computer software applications (e.g., Microsoft Word, Excel, etc.).
10. Legal and ethical principles that guide paralegal conduct, including unauthorized practices of law, lawyer supervision of non-lawyers, confidential attorney-client privilege, conflict of interest and competence.
11. Basic office equipment (i.e., photocopier, fax machine, etc.) to perform necessary administrative and operational duties.
12. How to prepare legal documents in an effective manner (e.g., briefs, motions, and declarations).
13. California Style Manual to ensure proper formatting of legal documents (i.e., case citation).
14. Federal and state laws.
15. Case management process (i.e. PASS).
16. Proper filing techniques to ensure SBE deadlines are met.
17. Federal documents (i.e. account transcripts, audit reports, tax court decisions, etc.).
18. Taxpayer accounts and tax return information (i.e., TI, INC, IDAX, e-View, ARCs).

**Skill to:**

1. Accurately evaluate facts and issues involved to determine a proper course of action.
2. Communicate effectively both in writing and verbally in order to assist attorneys, staff, and the public.
3. Read and understand statutes, regulations, court decisions, proper legislation, legal reference materials and other legal documents to research and evaluate legal principles and procedures.
4. Work cooperatively with attorneys, Franchise Tax Board staff, and taxpayers to address all issues.
5. Use word processing applications sufficiently and effectively to prepare, edit, save, and retrieve documents.
6. Review legal documents for content, citations, formatting, page limitations, etc.
7. Use email functions effectively and ethically.
8. Perform simple mathematical calculations (addition, subtraction, multiplication and division) using a calculator when necessary to determine or verify mathematical figures.
9. Use both manual (print) and electronic sources of law to locate applicable primary source materials.
10. Train other staff on how to perform a task or understand a concept.
11. Properly cite check legal documents.
12. Appropriately Shepardize cases to update and verify the reliability of cited legal authority/precedent.

**Ability to:**

1. Effectively communicate information and ideas verbally and in writing.
2. Effectively prioritize work within time constraints and adjusting schedules to meet deadlines.
3. Effectively handle multiple tasks simultaneously while producing a quality work product.
4. Take initiative and work independently.
5. Utilize time efficiently, pay attention to detail, and prioritize assignments.
6. Accept constructive criticism regarding work product and practices in order to continually improve work performance.
7. Work independently and with a minimum amount of supervision when appropriate.
8. Interact effectively in person and by telephone with attorneys, taxpayers, taxpayer's representatives, SBE, Victim Compensation and Governmental Claims Board (VCGCB), coworkers and other professionals.
9. Apply principles of professional ethics to specific factual situations.
10. Effectively advocate Franchise Tax Board's position in an appeal before the State board of Equalization (SBE).

## 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/Certification Unit at (916) 845-3608.

## DISCLAIMER

Please click on the link below to review the official California State Personnel Board class specification:  
<http://jobs.spb.ca.gov/wvpos/jobspecs.cfm>

## 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/Certification Unit**

**P.O. Box 550, Sacramento, CA 95812-0550**

**Phone: (916) 845-3608**

**Website: [www.ftb.ca.gov](http://www.ftb.ca.gov)**