



**CDTFA**  
CALIFORNIA DEPARTMENT OF  
TAX AND FEE ADMINISTRATION

## **Tax Auditor, Board of Equalization**

**Exam Code: 8PB12**

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

**Exam Type:** Departmental, Open

**Final Filing Date:** Continuous

### **CLASSIFICATION DETAILS**

**Tax Auditor, Board of Equalization** – \$4,425.00 - \$7,194.00 per month.

View the [Tax Auditor, Board of Equalization classification specification](#)

This classification is utilized by both the Board of Equalization and the California Department of Tax & Fee Administration.

### **APPLICATION INSTRUCTIONS**

Final Filing Date: Continuous

#### **Who Should Apply:**

Applicants who meet the minimum qualifications as stated on this bulletin may apply for and take this examination.

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

#### **How To Apply:**

The link to connect to the Training and Experience Evaluation is located farther down on this bulletin in the “Taking the Exam” section.

#### **Special Testing Arrangements:**

If you require special testing arrangements due to a verified disability or medical condition, please contact:

California Department of Human Resources  
CalCareer Service Center

1810 16th Street  
Sacramento, CA 95814

Phone: (866) 844-8671

Email: [CalCareer@CalHR.CA.GOV](mailto:CalCareer@CalHR.CA.GOV)

California Relay Service: 7-1-1 (TTY and voice)

TTY is a Telecommunications Device for the Deaf, and is reachable only from phones equipped with a TTY Device

## 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.

### All Levels:

Experience applicable to one of the following patterns may be combined, on a proportional basis, with experience applicable to another pattern to meet the total experience requirement.

### Tax Auditor, Board of Equalization

#### Either 1

[Equivalent to graduation from college](#), with a specialization in accounting. (Registration as a senior student in a recognized institution will admit applicants to the examination; however, evidence of successful completion of the curriculum and the prescribed courses must be produced before being considered eligible for appointment.)

#### Or 2

#### Completion of either:

- a. A prescribed professional accounting curriculum given by a residence or correspondence school of accounting including courses in elementary and advanced accounting, auditing, cost accounting, and business law; **or**
- b. The equivalent of 19 semester units, 16 units of which must have been professional accounting courses given by a collegiate-grade residence institution including courses in elementary and intermediate or advanced

accounting, auditing, and cost accounting, and three semester units of business law.

(Applicants who will complete course work requirements outlined under a and b above during the current quarter or semester will be admitted to the examination; however, evidence of successful completion of the curriculum and the prescribed courses must be produced before being considered eligible for appointment.)

## **POSITION DESCRIPTION**

### **Tax Auditor, Board of Equalization**

This is the recruiting/training and journey level of the series. Under close supervision, incumbents either: (1) conduct the least-to-moderately difficult field audits, assist in the more difficult field audits, correspond with taxpayers, and answer tax-related questions; or (2) in a Headquarters unit, review field audit reports or petitions for redetermination and claims for refund and correspond and discuss the application of tax laws with taxpayers, attorneys, accountants, and District office staff

## **EXAMINATION SCOPE**

This examination consists of the following components:

**Training and Experience Evaluation** – Weighted 100% of the final score.

The examination consists solely of a **Training and Experience Evaluation**. To obtain a position on the eligible list, a minimum score of 70% must be received. Applicants will receive their score upon completion of the Training and Experience Evaluation process.

In addition to evaluating applicants' relative knowledge, skills, and ability, as demonstrated by quality and breadth of education and/or experience, emphasis in each exam component will be measuring competitively, relative job demands, each applicant's:

### **Knowledge of:**

1. General accounting and auditing principles and procedures and business law.

### **Ability to:**

1. Apply the required knowledge.
2. Conduct audits or financial examinations of taxpayer's accounts and records.
3. Meet with and obtain the cooperation of persons subject to tax or regulation.
4. Create and maintain an atmosphere of good will in beginning and completing an audit and disclosing findings critical in nature.

5. Analyze data and draw sound conclusions.
6. Analyze situations accurately and take effective action.
7. Prepare clear, complete, and concise reports.
8. Communicate effectively.

## ELIGIBLE LIST INFORMATION

A departmental, open eligible list for the **Tax Auditor, Board of Equalization** classification will be established for:

California Department of Tax & 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. 1093) is available [online](#). Additional information on veteran benefits is available at the Department of Veterans Affairs.

Career credits **will not** be added to the final score for this exam, because it does not meet the requirements to qualify for career credits.

## EXAMINATION INFORMATION

[Preview the Tax Auditor 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

We recommend using Chrome, Firefox, or Edge for optimal performance when accessing the examination.

[Take the Tax Auditor, Board of Equalization examination.](#)

## TESTING DEPARTMENTS

California Department of Tax & Fee Administration

## CONTACT INFORMATION

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 & Fee Administration

Examination & Recruitment Section

California Department of Tax & Fee Administration

450 N Street, MIC 17

Sacramento, CA 95814

Email: [exams@cdtfa.ca.gov](mailto:exams@cdtfa.ca.gov)

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

### California Department of Human Resources

CalCareer Service Center

1810 16<sup>th</sup> Street

Sacramento, CA 95814

Phone: (866) 844-8671

Email: [CalCareer@CalHR.CA.GOV](mailto:CalCareer@CalHR.CA.GOV)

California Relay Service: 7-1-1 (TTY and voice)

TTY is a Telecommunications

## 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 Human Resources (CalHR) 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.

The requirement for “Equivalent to graduation from college” means at least a Bachelor’s degree from an accredited college or a letter from the college or university stating the applicant has met all of the academic requirements for graduation. Transcripts provided for verification must show the date the degree was awarded/conferred.

For specific coursework, transcripts must indicate applicant name, the name of the institution, and detailed information regarding any required coursework, including: course title; semester/quarter credits earned; name of institution; and completion dates. Acceptable college course work must be from an accredited, recognized institution approved by the California Superintendent of Public Instruction under the provisions of California Education Code Section 94712.

Applicants with foreign transcripts must provide a foreign transcript evaluation that indicates the number of units that his/her foreign course work is equivalent to.