

“This is only a **preview** of the exam questions. To take the actual exam, please refer back to the bulletin and click on the ‘**Click here to go to the Internet Exam**’ link at the bottom of the bulletin.”

Tax Technician, FTB Training and Experience Evaluation

Respond to each of the following statements by indicating how the statement applies to you. You should respond to every statement by marking one option.

In responding to each statement, you may refer to your FORMAL EDUCATION, FORMAL TRAINING COURSES or WORK EXPERIENCE at an organization.

To respond appropriately, you must refer to the Scale Description below when answering each statement.

Scale Description

Scale #1 Knowledge related to performing this action:

Extensive knowledge

I possess an advanced knowledge level to the extent that I could effectively perform this action under the majority of circumstances or situations encountered; and I could instruct others on specific aspects of this action.

Moderate knowledge

I possess a solid knowledge level that would allow me to perform this action successfully.

Limited knowledge

I have some knowledge of how to perform this action, but may require additional instruction to apply my knowledge effectively.

No knowledge

I have no knowledge of how to perform this action or what it may entail.

Section #1

Written Communication

1. Reading and comprehending written materials (e.g. references, memos, letters) in order to apply information and determine appropriate courses of action.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

2. Writing reports, memos and/or emails clearly and concisely using the structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

3. Reviewing draft versions of written documents to correct spelling, grammar, format, and ensure the accuracy of content

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

4. Contacting and/or responding in writing to customers, staff members and others in order to resolve issues utilizing various reference materials.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

5. Communicating effectively in writing to convey information.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

6. Reviewing forms for content, accuracy and completeness

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

7. Reading, comprehending and interpreting complex information (e.g., laws and regulations, technical data and materials).

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

8. Reading and interpreting written and/or numerical data to provide information to customers or other interested parties.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

9. Documenting verbal and written customer contact to include: reason for the contact and actions taken to resolve the immediate issues discovered.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

10. Utilizing reference resources to accurately complete job assignments and assist customers or other interested parties.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

Section #2

Interpersonal/Oral Communication

11. Communicating verbally to effectively convey information.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

12. Providing good customer service to address customer need and/or concerns.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

13. Meeting quality standards for customer service while evaluating customer needs.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

14. Formulating relevant questions to help clarify customer needs or concerns.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

15. Establishing and maintaining cooperative and professional relations with internal and external customers.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

16. Working cooperatively and productively as a member of a team to achieve a common goal.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

17. Interacting tactfully and diplomatically with a variety of audiences, including frustrated, angry, or otherwise emotional individuals.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

18. Communicating difficult concepts clearly and effectively (e.g., technical material).

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

19. Communicating verbally in stressful situations, such as when dealing with angry or hostile individuals or under emergency conditions.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

20. Improving and maintaining performance standards by utilizing feedback from others (e.g., peers, supervisors, instructors).

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

21. Demonstrating assertiveness, firmness and discretion in communications with the public.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

22. Listening carefully to what other people are saying and taking time to understand the points being made

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

23. Recognizing potential conflicts/problems and directing concerns to the appropriate individuals.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

24. Responding verbally to inquiries from internal/external customers in order to resolve issues relevant to work performed

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

25. Providing training or instruction to others (e.g., new employees, coworkers, classmates) so that they can perform duties and/or tasks.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

Section #3

Analysis and Problem Solving

26. Analyzing customer's financial data to interpret various account related issues.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

27. Utilizing basic accounting principles (e.g., debits, credits) to analyze information required for the job.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

28. Performing basic mathematical operations (e.g. addition, subtraction, multiplication, division, percentages, order of operations) to verify or adjust numerical information

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

29. Interpreting and analyzing numerical data accurately.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

30. Determining the accuracy of various mathematical calculations.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

31. Analyzing and evaluating situations accurately and thoroughly to determine and implement effective and appropriate courses of action.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

32. Utilizing problem-solving techniques and processes to identify and resolve problems and issues.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

33. Gathering information from various resources (e.g., databases, internet) to verify customer information.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

34. Analyzing information from various sources checking for discrepancies to determine the appropriate course of action.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

35. Analyzing financial information to determine the customer's ability to pay monies owed.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

Section #4

Workload Management and Office Equipment

36. Organizing and managing time to maintain workflow and meet deadlines.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

37. Recognizing questions or situations outside the assigned area of responsibility and referring to appropriate sources for resolution.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

38. Adapting to changes in priorities and work assignments.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

39. Working under pressure of tight deadlines when completing projects or assignments.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

40. Working independently on projects or assignments with minimal supervision and/or instructions.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

41. Multi-tasking several workloads with competing priorities while still meeting established deadlines.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

42. Learning to utilize personal computer systems and software applications to perform work.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

43. Using office equipment (e.g. calculator, copier, fax machine, personal computer, telephone etc.) to perform job duties.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

44. Using the internet, email, and other basic PC functions.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge

45. Entering data accurately into a computerized database.

Knowledge related to performing this action:

- Extensive Knowledge
- Moderate Knowledge
- Limited Knowledge
- No Knowledge