



# STATE BOARD OF EQUALIZATION

## BUSINESS TAXES COMPLIANCE SPECIALIST

EXAM CODE: 9EQ01

Promotional for the Board of Equalization

*California State Government provides equal opportunity to all regardless of race, color, creed, national origin, ancestry, sex, marital status, disability, religious or political affiliation, age, or sexual orientation.*

*It is an objective of the State of California to achieve a drug-free state work force 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.*

### HOW TO APPLY

State Applications (Form STD. 678) may be mailed to:

**EXAMINATION & RECRUITMENT SECTION  
BOARD OF EQUALIZATION  
450 N STREET MIC: 17  
SACRAMENTO CA 95814**

Applications may be delivered in person to the above street address.

**Do not submit applications to the State Personnel Board.**

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### FILING INFORMATION

**February 2, 2009**

### CUT-OFF DATE

The California State Board of Equalization administers this test on a continuous filing basis for positions in various locations throughout California and in Houston, Texas; Chicago Illinois; New York City, New York. Applicants who meet the minimum qualifications may apply for and take this examination at any time.

MEETING THE MINIMUM QUALIFICATIONS TO COMPETE IN THE ASSOCIATE TAX AUDITOR, BOARD OF EQUALIZATION EXAMINATION DOES NOT ASSURE PLACEMENT ON THE ELIGIBLE LIST. COMPETITORS MUST SUCCESSFULLY PASS THE EXAMINATION.

Applications (Form STD. 678) must be **POSTMARKED** (e.g., United States Postal Service), or personally delivered to the Human Resources Division, Room 317, 450 N Street, Sacramento, CA 95814.

**Note:**

**Do not send your application via interoffice or interagency mail. Applications received in this manner will not be accepted and cannot be returned pursuant to California Code of Regulations 174.**

It is the personal responsibility of each examination candidate to submit an examination application within the timeframe and in the manner specified on this examination bulletin.

Accepted applicants are required to bring either a photo identification card or two forms of signed identification to the examination.

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### CONTINUOUS FILING AND TESTING INFORMATION

Applicants who applied after the last cut-off date of July 31, 2008 do not need to resubmit their application.

Applications will continue to be accepted after February 2, 2009; however, the Examination and Recruitment Section will hold all applications submitted after that date until the next testing period.

Candidates who were unsuccessful or disqualified will be eligible to apply for this exam administration.

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### SPECIAL TESTING ARRANGEMENTS

If you are disabled and need special testing arrangements, mark the appropriate box in Part 2 of the "Application for Examination." You will be contacted to make specific arrangements.

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### QUALIFICATIONS APPRAISAL INTERVIEW

It is anticipated that qualification appraisal interviews will be held during **March 2009**.

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### SALARY RANGE

\$4619 – \$5616

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**WHO SHOULD APPLY**

This is a departmental promotional examination for the Board of Equalization.

1. Applicants must have a permanent civil service appointment with the Board of Equalization or meet the provisions of the State Personnel Board Rules 234 or 235 by February 2, 2009 the final filing date, in order to take this examination; or
2. Must be a current or former employee of the Legislature for two or more years as defined in Government Code 18990; or
3. 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 18992; or
4. Must be a person retired from the United State military, honorably discharged from active military duty with a service-connected disability, or honorably discharged from active duty as defined in Government Code 18991.

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.

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**ELIGIBLE LIST INFORMATION**

A departmental promotional eligible list will be established for the Board of Equalization. Names of successful competitors are merged into the list in order of final scores, regardless of date. Eligibility expires 12 months after it is established.

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**COMPETITION RESTRICTIONS**

Competitors, who are eliminated for not meeting the minimum requirements as stated on this examination bulletin, may reapply when the entrance requirements are met.

Competitors who do not appear for their scheduled examination or who do not attain a minimum rating of 70% must wait at least six months from the date of disqualification before reapplying.

Successful competitors establish list eligibility for 12 months and must wait nine months from the list date before competing again.

Current candidates on the July 31, 2008 list are not eligible to apply for this new testing period.

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**REQUIREMENTS FOR  
ADMITTANCE TO THE  
EXAMINATION**

All applicants must meet the entrance requirements for this examination by **February 2, 2009**, the final filing date.

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.

**Either I**

One year of experience in the California state service performing the duties of a Business Taxes Representative, Range C.

**Or II**

Four years of field experience in tax law compliance and tax collection work, at least one year of which shall have involved performance of the most difficult assignments. (Experience in California state service applied toward this pattern must include one year at a level equivalent to Business Taxes Representative, Range C.)

**Special Requirements** -- All employees must be willing to work long and irregular hours and in various locations throughout the State, and have keenness of observation, persistency, imagination, and tact.

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**THE POSITION**

Under general supervision, a Business Taxes Compliance Specialist independently performs the more complex activities on a full-time basis, including tax compliance and collection work, registration, revocation and criminal investigations. These positions are found in offices where the workload permits specialization and concentration in a caseload of the most complex activities.

Positions exist statewide with the Board of Equalization.

**Various positions may require the incumbent to be fingerprinted.**

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**EXAMINATION INFORMATION**

This examination will consist of a Qualifications Appraisal Interview weighted 100%.

The interview will include a number of predetermined job-related questions. In order to obtain a position on the eligible list, a minimum rating of 70% must be attained in the interview. **COMPETITORS WHO DO NOT APPEAR FOR THE INTERVIEW WILL BE DISQUALIFIED.**

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**EXAMINATION INFORMATION  
(Continued)**

**Qualifications Appraisal Interview -- Weighted 100.00%**

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**Scope:**

**A. Knowledge of:**

1. Methods and problems of organization, administration, and management.
2. Commercial law, business practices, and financial record keeping.
3. Rules of evidence, preparation of evidence, and court procedures.
4. Interviewing techniques.
5. Methods used by violators in evading tax liability.
6. Investigation techniques and sources of information used in locating persons.
7. Methods used and remedies available for the collection of taxes.
8. Functions of Federal, State, and local tax, regulatory, and law enforcement agencies.

**B. Ability to:**

1. Apply the required knowledge.
2. Independently conduct complex investigation and detect or verify suspected violations.
3. Establish and maintain cooperative relationships with law enforcement agencies and others contacted in the work.

Veterans' preference credit **is not granted in promotional examinations.**

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**NOTIFICATION OF EXAMINATION RESULTS**

Results from the examination will be mailed to the candidate approximately 6 – 8 weeks after the examination process is completed.

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**QUESTIONS?**

If you have questions concerning this examination, please call the California State Board of Equalization, Examination and Recruitment Section at (916) 324-4807. You may also contact the California State Board of Equalization in writing at 450 N Street, MIC 17, Sacramento, California, 95814.

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**GENERAL INFORMATION**

**Examination Security Information** – After the completion of your examination, you may not discuss the contents of the examination including the questions, with anyone except the interview panel members, or the Examination and Recruitment Section. Examinations are competitive and the only way another individual may unfairly learn the contents of the examination material is from you. When you talk about the examination with other competitors, it could help them score higher and impact your score or placement on the eligible list. No personal items (i.e., notes, notepads, PDA's cell phones, purses, wallets, etc.) are allowed to be used during your examination. Failure to comply can result in your disqualification from the examination and may result in disciplinary action. Evidence of copying or collusion may result in the cancellation of the examination and the debarment of the competitor from future state civil service examination of any kind.

**It is the candidate's responsibility** to contact the Board of Equalization's Examination and Recruitment Section in Sacramento (916) 324-4807, CALNET 454-4807, three days prior to the written test date if he/she has not received his/her notice.

**For an examination** without a written feature it is the candidate's responsibility to contact the Board of Equalization's Examination and Recruitment Section in Sacramento (916) 324-4807, CALNET 454-4807 three weeks after the final filing date if he/she has not received a progress notice.

**If a candidate's notice** of oral interview, self-assessment report or performance test fails to reach him/her prior to the day of the interview due to a verified postal error, he/she will be rescheduled upon written request.

**Applications** are available at State Personnel Board offices, local offices of the Employment Development Department and the Department noted on the front. Applications may also be downloaded from the State Personnel Board web site at <http://www.spb.ca.gov>.

**If you meet the requirements stated** in 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 described in this bulletin 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.

**The Board of Equalization** 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 competitors will be notified.

**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. Ordinarily, interviews are scheduled in Sacramento, San Francisco, and Los Angeles. However, locations of interviews may be limited or extended as conditions warrant.

**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 within one to four years unless otherwise stated on this bulletin.

**Promotional Examinations Only:** Competition is limited to employees who have a permanent civil service appointment. 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 departmental personnel offices or at the Information Counter of State Personnel Board offices.

**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.

**Interview Scope:** If an interview is conducted, in addition to the scope described in this bulletin, the panel will consider education, experience, personal development, personal traits, and fitness. In appraising experience, more weight will be given to the breadth and recency of pertinent experience and evidence of the candidate's ability to accept and fulfill increasing responsibilities than to the length of his/her experience. Evaluation of a candidate's personal development will include consideration of his/her recognition of his/her own training needs; his/her plans for self-development; and the progress he/she has made in his/her efforts toward self-development.

**College Education:** The qualifications meeting the requirement "Equivalent to graduation from college" means satisfaction of the requirements for the bachelor's degree from an accredited, recognized institution of higher education. This means the applicant must show receipt of a bachelor's degree. 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.

**TDD** is Telecommunications Device for the Deaf and is reachable only from phones equipped with a TDD Device. Calls may be placed using the following relay system.

California Relay Telephone Service for the Deaf or Hearing Impaired:

From TDD phones: **1-800-735-2929**

From voice phones: **1-800-735-2922**