



# CDTFA

CALIFORNIA DEPARTMENT OF  
TAX AND FEE ADMINISTRATION

## ASSOCIATE TAX AUDITOR EXAM CODE: 0EQ16

Department(s):	California Department of Tax and Fee Administration
Bulletin Release Date:	September 16, 2020
Final Filing Date:	October 7, 2020
Exam Type:	Departmental Promotional
Salary:	\$5676.00 to \$7463.00
Location(s):	State-wide Chicago, Illinois Houston, Texas New York, New York

## SELECTION PLAN

This examination will be administered as a Training and Experience Questionnaire. After all candidate eligibility has been determined, accepted candidates will be provided an online web link to the Questionnaire and notified of what date the Questionnaire will need to be completed by.

## FILING INSTRUCTIONS

Final Filing Date: **October 7, 2020**

*To be considered for this examination, you must use the current application (STD. 678) with a revision date of 07/2019 or prior revision date of 12/2017. Applications are available at <http://jobs.ca.gov/>*

**State Applications -- Form STD. 678 -- may be mailed to:**

**CALIFORNIA DEPARTMENT OF TAX AND FEE ADMINISTRATION  
EXAMINATION SECTION  
450 N STREET, MIC: 17  
SACRAMENTO, CA 95814**

Due to the current heightened health awareness, the Human Resources Bureau – Examination Section will be temporarily accepting electronic applications to our email address at [Exams@cdtfa.ca.gov](mailto:Exams@cdtfa.ca.gov). If submitted electronically, you **must** include a completed application (STD. 678) and ANY required documents before the final file date or you will be eliminated from the examination process.

**Applications received cannot be returned pursuant to California Code of Regulations 174.**

Applications submitted by mail must be **POSTMARKED** to indicate the “Date of Processing,” or personally delivered no later than the final filing date. Applications postmarked or personally delivered after the final filing date will not be accepted for any reason.

**You are advised not to send your application via interoffice or interagency mail as a date sent cannot be determined.**

Candidates are responsible for a timely submission of their application (and any other required documentation) and are encouraged to contact the Examination Section at [Exams@cdtfa.ca.gov](mailto:Exams@cdtfa.ca.gov) to verify receipt of their application before the final filing date.

All applications must include: the Exam Code and Classification Title(s)\*; “to” and “from” dates (month/day/year); time base and hours worked; civil service class title (not working title); and complete description of duties performed. **Any applications received without candidate signature or complete information will be rejected.**

## EXAMINATION INFORMATION

This examination will consist of a Training & Experience Questionnaire evaluation weighted 100%. In order to obtain placement on the eligible list, a minimum rating of 70% must be attained. **After all applications are reviewed and accepted, candidates determined to meet the minimum qualifications will then be provided a web link to take their Training & Experience Questionnaire online. Candidates will be notified when receiving their web link of what date the Questionnaire will need to be completed by; failure to complete the Questionnaire by the provided date will result in the candidate being eliminated from the examination process.**

## ELIGIBLE LIST INFORMATION

A 12-month eligible list will be established for the California Department of Tax and Fee Administration: **Houston, Texas; Chicago, Illinois; New York, New York; and throughout California.** Eligibility of all candidates may be extended after 12 months but will be abolished upon the completion of a new examination administration. The State Board of Equalization will also utilize the results of this list.

## REQUIREMENTS FOR ADMITTANCE TO THE EXAMINATION

All applicants must meet the education and/or experience requirements as stated in the Minimum Qualifications section of this examination announcement by the final filing date.

As this is a promotional examination, your application will not be accepted unless you are currently a Board of Equalization or California Department of Tax and Fee Administration employee that meets the minimum qualifications or fall under: SPB rule 234; SPB rule 235; or Government Code 18990, 18991, or 18992.

## MINIMUM QUALIFICATIONS

The following minimum qualification patterns come directly from the official classification specification, found at <https://jobs.ca.gov/CalHRPublic/Tools/ClassSalarySearch.aspx>

### Either I

One year of experience in California state service performing duties at a level equivalent to Tax Auditor, Board of Equalization, Range B. (Promotional candidates within six months of satisfying this requirement will be admitted to the examination but must fully meet the requirement before being considered eligible for appointment.)

### Or II

Three years of professional experience in government, commercial, or public auditing performing analytical or critical examination of records or books of account with responsibility for laying out audit programs and determining verification procedures to be used in determining the scope of work to be performed, at least one year of which shall have been equivalent in responsibility to that involved in making the more difficult field or office audits. (Experience in California state service applied toward this pattern must include one year of experience at a level equivalent to Tax Auditor, Board of Equalization, Range B.)

## POSITION DESCRIPTION

This is the full journey level in the series. Incumbents, under general direction, either: (1) conduct the more difficult and complex audits, which may include leading lower level auditors; or (2) in a Headquarters unit, review field audit reports or petitions for redetermination and claims for refund; prepare summaries and statements of fact for use in hearings or court proceedings; and correspond and discuss the application of tax laws with taxpayers, attorneys, accountants, and District office staff.

## KNOWLEDGE AND ABILITIES

Knowledge of: General accounting and auditing principles and procedures and business law; specialized practices and procedures used in tax auditing; provisions of the tax laws administered by the State Board of Equalization, related legal opinions and court decisions, and departmental policies, rules, and regulations; and organization of the State Board of Equalization, particularly the tax auditing programs.

Ability to: Apply the required knowledge; conduct audits or financial examinations of taxpayer's accounts and records; meet with and obtain the cooperation of persons subject to tax or regulation; create and maintain an atmosphere of good will in beginning and completing an audit and disclosing findings critical in nature; analyze data and draw sound conclusions; analyze situations accurately and take effective action; prepare clear, complete, and concise reports; and communicate effectively.

## SPECIAL REQUIREMENTS

Willingness to travel and work odd hours away from the office.

## CONTACT INFORMATION

If you have questions concerning this examination, or if you need reasonable accommodations, please contact the California Department of Tax and Fee Administration, Examination Section by email at [Exams@cdtfa.ca.gov](mailto:Exams@cdtfa.ca.gov).

## GENERAL INFORMATION

**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.

**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.

**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.

**Reasonable Accommodations:** Candidates needing special testing arrangements due to a disability must mark the appropriate box on the application and/or contact the testing department.

**Notices:** For any examination, it is the candidate's responsibility to contact the Examination and Recruitment Section three weeks after the final filing date if notification has not been received.

**Competitive Examination:** Possession of the entrance requirement(s) 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.

**Revision of Plan:** The California Department of Tax and Fee Administration reserves the right to revise the examination plan to better meet the needs of the department should any circumstances change during this examination administration. Such revision will be in accordance with civil service laws and rules.

**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 or a letter from the college or university stating the applicant has met all of the academic requirements for graduation. 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.

**Veterans' Preference:** Veteran's preference credits will be awarded for all open competitive examinations, pursuant to government code section 18973.1 and 18973.5, effective January 1, 2014, as follows: 1) Any veteran, widow or widower of a veteran, or spouse of a 100 percent disabled veteran, who achieves a passing score in an entrance examination, shall be ranked in the top rank of the resulting eligibility list. Any veteran who has been dishonorably discharged or released is not eligible for veteran's preference; 2) An entrance examination is defined, under the law, as any open competitive examination; 3) Veterans preference is not granted once a person achieves permanent civil service status.

The California Department of Human Resources (CalHR) has information on how to apply for Veterans' Preference on their website at <https://jobs.ca.gov/> and on the Application for Veterans' Preference form <https://www.calhr.ca.gov/Documents/CalHR-1093.pdf>. Additional information is also available at the Department of Veterans Affairs website at <https://www.calvet.ca.gov/>

**Deaf or Hard of Hearing:** TTY is a Telecommunications Device for the Deaf and is reachable only from phones equipped with a TTY Device. Calls may be placed using the California Relay Service: From TDD: (800) 735-2929; From Voice (800) 735-2922; From TTY: 711 (NATIONAL RELAY SERVICE)