



TRANSITION EXAMINATION

Examination No. & Title	Salary Grade	Beginning Salary	Non-Refundable Processing Fee (Waivers Available)
00-029020 Taxpayer Services Representative 1	11	\$47,695	\$0
00-030020 Taxpayer Services Representative 1 (Spanish Language)	11	\$47,695	\$0

Multiple-Choice Test
To Be Held:
MAY 9, 2026

Applications MUST Be Submitted
Online or Postmarked By:
MARCH 25, 2026

You may be assigned to either Saturday or Sunday to take your test. You cannot request or change your scheduled day.

ONLINE APPLICATION PROCESS AVAILABLE at <https://www.cs.ny.gov/jobseeker>

Due to current testing space limitations, candidates may need to travel to a test site to take this examination. Candidates will be notified of their test site location on their admission notice.

This **TRANSITION EXAMINATION** is one of several concepts included in a Memorandum of Intent agreed to by New York State and CSEA and is designed to provide opportunities for employees within state service.

Interdepartmental Transition examination open to all qualified employees of the New York State Department of Taxation and Finance and the Division of Tax Appeals.

For advancement in State Departments, Facilities, and Agencies

1. Within Promotion Units 2. Within Entire Departments 3. To Other Departments

THE LISTS RESULTING FROM THESE EXAMINATIONS WILL BE USED FOR VACANCIES IN THE ALBANY AND ROTTERDAM AREA(S) ONLY.

Minimum Qualifications: On or before May 9, 2026, you must be a qualified employee of the **New York State Department of Taxation and Finance or the Division of Tax Appeals** and have had three months of permanent competitive, non-competitive, labor class, non-competitive NY HELPS*, or 55-b/55-c service in a position allocated to a Grade 4 or higher. If you have received a permanent appointment to a qualifying title listed and served provisionally** in that title immediately preceding your permanent appointment, such provisional service may be counted towards meeting the time in title required for this examination.

To view a list of qualifying titles visit: <https://www.cs.ny.gov/examannouncements/announcements/00029020qualifying.cfm>.

If you were permanently appointed to a qualifying title on or before February 9, 2026, and have served continuously in this title since that date, you are eligible to file for this examination.

**If you were permanently appointed via the New York Hiring for Emergency Limited Placement Statewide (NY HELPS) program to a qualifying title in the non-competitive class on or before February 9, 2026, and have served continuously in this title since that date, you may apply for this examination.*

***If you were permanently appointed to a qualifying title and had provisional service in the same title immediately preceding the permanent appointment, such provisional service may be counted towards meeting the time in title required to apply for this examination. Your provisional appointment must have been on or before February 9, 2026, to qualify for this examination.*

Qualifying Experience For Appointment From The Eligible List: After one year of service described in the Minimum Qualifications, successful candidates will be qualified for appointment from the eligible list.

Employees appointed via the NY HELPS program to a qualifying title in the non-competitive class will have their names restricted from appointment from the eligible list until their position is covered-in to the competitive class by action of the New York State Civil Service Commission or otherwise obtain permanent competitive status in the position.

If you have received a permanent appointment to a qualifying title listed and served provisionally in that title immediately preceding your permanent appointment, such provisional service may be counted towards meeting the one year time in title required for appointment from the eligible list.

Order of Certification: The order of certification of this eligible list will be:

1. Department "All" eligibles
2. Interdepartmental "All" eligibles

Additional Requirement for Appointment:

- **Language Proficiency:** If you pass the examination and apply to a title which requires language proficiency, you must demonstrate your language proficiency at a level that will ensure your ability to perform the duties of the position properly. The proficiency test will only be given to enough candidates to fill current vacancies.

The Positions: These positions exist in the New York State Department of Taxation and Finance and are located in Albany and Rotterdam only.

Duties: As a **Taxpayer Services Representative 1** or a **Taxpayer Services Representative 1 (Spanish Language)**, under the supervision of a Taxpayer Services Representative 2 or Taxpayer Services Representative 2 (Spanish Language), you would work in an environment using the latest technology and automated operations to provide information and assistance to the taxpaying public. You would answer taxpayers' or tax practitioners' questions by telephone, by letter, or in person concerning the provisions and requirements of the Tax Law administered by the Department; assist taxpayers in their preparation of Corporation, Income, Miscellaneous, or Sales Tax returns; and assist taxpayers in their computation of taxes, penalties, and interest due to the State. You would assist the public in the completion of all applications for licenses and registration forms and prepare written responses to requests for information. You would research Tax Department computer data files using a variety of software applications and provide explanations for account and refund adjustments, verify payments, and update taxpayer account information. You would explain the collection process; access computer systems in order to provide detailed explanations of assessment(s), account adjustments, payments and refunds; negotiate payment agreements. You might issue taxpayer registrations, handle changes in registrations, and respond to taxpayers' inquiries regarding assessments, including explaining the reasons for assessments, and follow-up to resolve taxpayers' problems. You would research Tax Laws and Regulations in the more commonly used reference materials such as tax law publications, attend periodic training sessions to upgrade technical skills, and assist in training seasonal Tax Information Aides. You would be expected to act in a calm, courteous, and reasonable manner even under very difficult, highly stressful, and at times, confrontational circumstances. When assigned to a call center, you would wear a headset and would answer telephone calls which are automatically and continuously distributed by a complex telephonic system. This system does not allow for breaks between calls; when one caller disconnects, another call is automatically routed to the Taxpayer Services Representative 1. You would be expected to effectively use the telephone system and associated computer software. All calls are subject to monitoring for quality assurance.

Note: If you submit an application for an examination with a language parenthesis, an application will automatically be submitted for you for the non-language examination.

Subject of Examination: To be considered for appointment to this title, you must pass the **multiple-choice test**. The **multiple-choice test** evaluates your knowledge, skills, and/or abilities in the following areas:

1. **Customer Service** - These questions test for knowledge of techniques used to interact with other people, to gather and present information, and to provide assistance, advice, and effective customer service in a courteous and professional manner. Questions will cover such topics as understanding and responding to people with diverse needs, perspectives, personalities, and levels of familiarity with agency operations, as well as acting in a way that both serves the public and reflects well on your agency.
2. **Evaluating conclusions in light of known facts** - These questions will consist of a set of facts and a conclusion. You must decide if the conclusion is proved by the facts, disproved by the facts or if the facts are not sufficient to prove or disprove the conclusion. The questions will not be specific to a particular field.

Subject of Examination Continued:

3. **Preparing written material** - These questions test for the ability to present information clearly and accurately, and to organize paragraphs logically and comprehensibly. For some questions, you will be given information in two or three sentences followed by four restatements of the information. You must then choose the best version. For other questions, you will be given paragraphs with their sentences out of order. You must then choose, from four suggestions, the best order for the sentences.
4. **Arithmetic computation with calculator** - These questions test for the ability to use a calculator to do basic computations. Questions will involve addition, subtraction, multiplication and division. You may also be asked to calculate averages, to use percents, and to round an answer to the nearest whole number. **You should bring with you a hand-held battery- or solar-powered calculator for use on this test.** You will **not** be permitted to use the **calculator** function of your **cell phone**.
5. **Understanding and interpreting written material** - These questions test for the ability to understand and interpret written material. You will be presented with brief reading passages and will be asked questions about the passages. You should base your answers to the questions **only** on what is presented in the passages and **not** on what you may happen to know about the topic.

Test Guide: A General Guide to Multiple-Choice Tests is available at <http://www.cs.ny.gov/testing/testguides.cfm>.

If you pass, your seniority credit(s), if any, will be included in the computation of your final score. Your final score on the eligible list will be determined after adding any Veterans' credits.

Credit For Seniority: Seniority is credited at the rate of one credit for each five-year period (or fraction thereof), excluding the first year of service.

Admission To The Test: If approved for a multiple-choice test, you will receive an admission notice which will indicate your assigned test date and the way your test will be administered. Your test may be administered with paper and pencil or online at a state test site. **You cannot request to change your scheduled day or request a specific type of test administration.**

Applicants are required to have a Personal NY.gov account and keep their email address up to date. The Department of Civil Service and other state agencies will communicate with you through email correspondence. This may include notification of your application status, your test arrangements, examination results, and canvassing you for interest in appointment. It will be important for you to keep your email address, phone number, and mailing address current by logging into <https://www.cs.ny.gov/home/myaccount>.

How To Apply: You will need a **personal NY.gov ID** to apply for these examinations. If you do not have a **personal NY.gov account**, please [create an account](#).

- Online our Internet address is <http://www.cs.ny.gov/jobseeker>; or
- Download an examination application [NYS-APP form](#); or
- Email cs.sm.examinfo@cs.ny.gov to request NYS-APP forms; or
- Obtain an NYS-APP form from a state agency or facility personnel/business office; or
- Request NYS-APP form by calling the Department of Civil Service in the Albany area at 518-457-2487 or toll free at 1-877-697-5627.

The NYS Department of Civil Service reserves the right to reject for lateness or to accept applications filed after the advertised filing period. All statements you make on your application are subject to investigation.

ADDITIONAL INFORMATION

NEW YORK STATE IS AN EQUAL OPPORTUNITY EMPLOYER: It is the policy of the State of New York to provide for and promote equal opportunity employment, compensation, and other terms and conditions of employment without unlawful discrimination on the basis of age, race, color, religion, disability, national origin, gender, sexual orientation, veteran or military service member status, marital status, domestic violence victim status, genetic predisposition or carrier status, arrest and/or criminal conviction record, or any other category protected by law, unless based upon a bona fide occupational qualification or other exception.

RELIGIOUS ACCOMMODATION: Most multiple-choice tests are held on Saturdays. If you cannot take the test on the announced test date, due to a conflict with a religious observance or practice, check the box under "Religious Accommodation." We will make arrangements for you to take the test on a different date (usually the following day).

REASONABLE ACCOMMODATIONS IN TESTING: It is the policy of the Department of Civil Service, in accordance with the New York State Human Rights Law and the Americans with Disabilities Act, to provide qualified persons with disabilities equal employment opportunity and equal opportunity to participate in and receive the benefits, services, programs, and activities of the Department. It is the policy of the Department to provide such persons reasonable accommodations and reasonable modifications as are necessary to provide equal opportunity. Persons with disabilities who require an accommodation to participate in an examination must note this on their application. Further information is available from the Test Accommodation Unit of the Department of Civil Service at Testaccommodation@cs.ny.gov.

ADMISSION TO EXAMINATION: Notice to appear for the test may be conditional as review of applications may not be made until after the test. If you have not received your notice to appear for the multiple-choice test three days before the date of the test, email us at AdmissionNotices@cs.ny.gov. Please provide your first and last name, address, and the last four digits of your social security number, and we will provide you with the information you need to attend your multiple-choice test. If you have an issue other than not receiving your admission notice, please contact our office at (518) 474-6470 in the Albany area or toll free at 1-877-697-5627. Please leave a clear concise message and provide your first and last name, last four digits of your social security number and a daytime phone number.

TAKING STATE AND LOCAL EXAMINATIONS SCHEDULED FOR THE SAME DAY: If you have applied to take a multiple-choice test announced by either one or several local jurisdictions (county, town, city) scheduled to be held on the same test date as this multiple-choice test, you must notify each of the local jurisdictions no later than two weeks before the test date to make arrangements for taking all tests at one test site. All tests will be held at the state examination center. For your convenience, contact information for all local civil service agencies is available on our website at: <http://www.cs.ny.gov/jobseeker/local.cfm>.

ELIGIBILITY FOR EXAMINATION: To be considered a qualified employee eligible to compete in this examination, you must be employed in, or on leave from, the specified department or agency on a permanent or contingent permanent basis in the competitive class, or in the non-competitive class or labor class if specifically noted on this announcement (or be on an appropriate preferred list), and have the specified time in the specified title or salary grade. You may not compete in a test for a title if you are permanently employed in that title (unless you are still on probation) or in a higher direct line of promotion.

CELL PHONES OR ELECTRONIC/COMMUNICATION DEVICES AT THE TEST SITE: The use of cell phones, beepers, headphones, or any electronic or other communication devices at your personal testing site or in the test room, hallways, restrooms, building, grounds, or other areas, except as expressly authorized by the Department of Civil Service, could result in your disqualification.