

CLASS SPECIFICATION



CLASS: Assessment Assistant I/II
ALLOCATION: Assessor's Office
FLSA STATUS: Non-Exempt
UNION AFFILIATION: YCEA

ESTABLISHED: February 2006
REVISED: September 2016

JOB SUMMARY:

Provides a variety of routine to difficult office support in the preparation of the assessment roll and maintenance of property assessment records and performs related work as assigned.

Assessment Assistant I: is the entry level class of this specialized office support series. Initially under close supervision, incumbents learn County and departmental policies and procedures and state, federal and local laws and regulations related to assessment activities. As experience is gained, there is greater independence of action within established guidelines. This is the entry level class of this specialized office support series. This class is flexibly staffed with Assessment Assistant II and incumbents may advance to the higher level after gaining the experience and demonstrating proficiency which meet the qualifications for the higher level class.

Assessment Assistant II: is the journey level class in this series. Under limited supervision, incumbents are fully competent to independently perform a variety of responsible assessment office support duties. Incumbents at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies within the work unit.

CLASS CHARACTERISTICS:

This position reports directly to a Supervisor or Assistant Assessor. This class is distinguished from the Assessment Specialist in that the latter performs the most difficult, technical, complex and/or specialized assessment office support duties which require an additional definable requirement of technical knowledge and skill.

EXAMPLES OF DUTIES:

Essential:

Assessment Assistant I:

- Receive and review property statements, changes of ownership forms, address changes, exemption forms and similar documents from property owners over a public counter or by mail.
- Review such forms for completeness, accuracy and compliance with County requirements; index such information by address, property tax code, parcel numbers and other relevant data.
- Prepare correspondence, reports, forms and specialized documents related to the assessment process using a typewriter or computer application.
- Enter data into computer system to update assessment rolls, ownership changes and related information; produce and review automated reports for correctness.
- Act as receptionist and receive and screen visitors and telephone calls and takes messages; provide factual information regarding the assessment process, forms required, departmental processes and functions which require the explanation of rules, policies and procedures.
- Receive and process documents related to specialty areas such as manufactured home, vessel and business property ownership.
- Establish and maintain office files; research and compile information from such files; purge files as required.
- Process and distribute incoming and outgoing mail.
- Receive and receipt payments for assessment services; balance and deposit money on a regular basis.
- Receive and process exemption claims.
- Receive and process building permits.

Important:

- Comply with all County equipment and safety policies and procedures, and California Occupational Safety and Health Administration (CalOSHA) rules and regulations.

- Must be able to review, prepare and maintain confidentiality of documentation.
- May train and direct the work of temporary staff for special projects or programs.
- Operate standard office equipment; may operate other departmental specific equipment after training.

EMPLOYMENT STANDARDS:

Knowledge of:

Assessment Assistant I:

- Business arithmetic.
- Correct business English, including spelling, grammar and punctuation.
- Principles and processes for providing customer service, in person and over the telephone. This includes customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction.
- Standard office practices and procedures, including filing and the operation of standard office equipment.
- Record keeping principles and practices.
- Basic computer applications related to the work.

Assessment Assistant II (in addition to the above):

- Processes and procedures related to assessment document processing and the production of secured and unsecured assessment rolls.
- Uses of specified computer applications involving document creation, data entry and/or standard report generation.
- Business letter writing and the standard format for correspondence.

Skill in:

Assessment Assistant I:

- Making accurate and rapid arithmetic calculations.
- Performing detailed office support work.
- Maintaining accurate office files.
- Typing at a net rate of 40 words per minute from printed copy.
- Understanding and following oral and written directions.
- Effectively using tact, patience, courtesy, discretion and prudence in dealing with those contacted in the course of the work.
- Speaking English effectively to communicate in person or over the telephone.

Assessment Assistant II (in addition to the above):

- Performing document processing and report production work.
- Composing correspondence independently or from brief instructions.
- Entering numerical and related information into a computer system with speed and accuracy.
- Meeting critical time deadlines.
- Using initiative and independent judgment within established procedural guidelines.
- Understanding and applying pertinent laws, rules and regulations.
- Explaining complex assessment rules and procedures to the public, in person and over the telephone.
- Dealing successfully with the public in person and over the telephone occasionally where relations may be confrontational or strained.

Ability to:

Assessment Assistant I:

- Listen carefully to what other people are saying, take time to understand the points being made, and ask questions as appropriate for clarification.
- Communicate effectively and efficiently verbally and in writing; understand, follow and issue verbal and written instructions.
- Establish and maintain effective working relationships with those contacted in the course of the work.
- Organize work; schedule and coordinate projects; set priorities; meet deadlines and maintain composure when working under pressure.
- Type at a net rate of 40 words per minute from printed copy.
- Learn State revenue and taxation laws governing the preparation of the assessment roll.

Assessment Assistant II (in addition to the above):

- Work without close supervision in standard work situations.
- Exercise appropriate judgment in answering questions and releasing information.
- Use initiative and independent judgment within general procedural guidelines.

Physical Demands: The physical demands and work environment described here are representative of those that must be met by an employee to successfully perform the essential function of the job, with or without accommodation. Prospective employees must complete a pre-employment medical exam (Occupational Group IV) which will measure the ability to:

- See well enough to read fine print and view a computer screen; speak and hear well enough to understand, respond, and communicate clearly in person and on the telephone; independent body mobility sufficient to stand, sit, walk, stoop and bend to access the work environment and a standard office environment; manual dexterity and sufficient use of hands, arms and shoulders to repetitively operate a keyboard and to write; and the ability to sit or walk for prolonged periods of time.

Accommodation may be made for some of these physical demands for otherwise qualified individuals who require and request such accommodation.

Work Environment:

- Generally a typical office environment.

QUALIFICATIONS:

The minimum and preferred requirements are listed below. While the following requirements outline the minimum qualifications, Human Resources reserves the right to select applicants for further consideration who demonstrate the best qualifications match for the job. Meeting the minimum qualifications does not guarantee further participation in selection procedures.

Licenses and Certification:

- The ability to obtain a valid California Class C driver's license within ten (10) days of employment; maintain throughout employment.
- Typing Certificate: Minimum Net of 40 wpm. Typing Certificate must indicate results from a five (5) minute test with at least the minimum net wpm required.

Special Requirements:

- Must successfully complete an extensive and thorough background investigation which includes Live Scan fingerprinting prior to hire.
- Will be required to perform disaster service activities pursuant to Government Code 3100-3109.

Education and Experience:

Assessment Assistant I:

MINIMUM: Equivalent to graduation from high school and one year of general office support experience involving computer applications. Type 40 wpm net.

PREFERRED: In addition to the above minimum, one year related experience in dealing with the public in a real estate, banking, title company or related office environment and working knowledge with computer applications such as Microsoft Word and Microsoft Excel.

Specific education (coursework in business practices or a related field) can be substituted for experience on a basis of 1.25 units = 1 month.

Assessment Assistant II:

MINIMUM: In addition to the Assessment Assistant I minimum requirements, one year of progressively responsible experience in an office support position related to the assessment of property for tax purposes equivalent to the County's class of Assessment Assistant I.

PREFERRED: In addition to the above minimum, two years related experience in dealing with the public in a real estate, banking, title company or related office environment and working knowledge with computer applications such as Microsoft Word and Microsoft Excel, with at least one of which is equivalent to the County's class of Assessment Assistant I.

Specific education (coursework in business practices or a related field) can be substituted for experience on a basis of 1.25 units = 1 month.

This class specification lists the major duties and requirements of the job. Incumbent may be expected to perform job-related duties other than those contained in this document.

Dept Approval: Department Head
Date:

EEOC: F
WC: 8810.1

Human Resources Approval: Analyst
Date:

Signature: _____

Signature: _____