

## CLASS SPECIFICATION



**CLASS:** Assessment Specialist  
**ALLOCATION:** Assessor's Office  
**FLSA STATUS:** Non-Exempt  
**UNION AFFILIATION:** YCEA

**ESTABLISHED:** July 1996  
**REVISED:** May 2019

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### **JOB SUMMARY:**

Under limited supervision, the incumbent provides difficult, technical and specialized office support in the preparation of the assessment roll and maintenance of property assessment records; may direct the work of subordinate assessment office support staff on a project or day-to-day basis and train less experienced assessment support staff; performs related work as assigned.

### **CLASS CHARACTERISTICS:**

This is the specialist level in the assessment office support series. Positions in this class require a definable body of knowledge and skills which exceed those required by lower level assessment office support staff and that is not normally learned on the job in a brief period of time. May act in a lead capacity for subordinate staff, but is not required on a day-to-day basis. This class is distinguished from Real Property Transfer Analyst I/II in that the latter is the advanced level in the assessment office series.

### **EXAMPLES OF DUTIES:**

#### **Essential:**

- Performs difficult, complex and technical office work, which requires the exercise of independent judgment and the application of technical skills necessary for the production of the assessment rolls.
- Reviews changes to the state Revenue and Taxation Code for impact to County procedures and recommends departmental procedural changes as required.
- Reviews all recorded documents received from Real Property Transfer Analyst for accuracy, chain of title and proportional interests. If accurate, proceed with entry into automated system. If inaccurate, discuss with Real Property Transfer Analyst.
- Reviews all parcel split, lot line adjustment, and parcel map worksheets received from drafts person for accuracy of new information and information carried forward to new parcels.
- Creates and enters into automated system new fee parcel numbers from parcel splits, lot line adjustments, tract and parcel maps and related documents.
- Receives and reviews property statements, changes of ownership forms, address changes, exemption forms and similar documents from property owners over a public counter or by mail.
- Types correspondence, reports, forms and specialized documents related to the assessment process from documents submitted, prior standard letters and memos, drafts, notes, or brief instructions, using a typewriter or computer.
- Coordinate the flow of property tax statements to ensure that all accounts are annually valued and that appropriate penalties are applied.
- Enter data into a computer system to update assessment rolls, ownership changes and related information; produces and reviews automated reports for correctness.
- Provides factual information to the public in person and over the telephone regarding the assessment process, forms required, departmental processes and functions which require the explanation of rules, policies and procedures.
- Receives and processes documents related to specialty areas such as mobile home, aircraft, mining claims, possessory interests and business property ownership.
- Establishes and maintains office files; researches and compiles information from such files; purges files as required; researches and reconciles special problems.
- Assists in training staff in work procedures, may act for the Assessment Office Supervisor in absence of the supervisor.

- Receive, review, and process complex exemptions, including but not limited to, disabled veterans, welfare, cemetery, church, and religious. May be required to assist applicants with completing forms.
- May be responsible for weekly and monthly balancing of cash deposits.

**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.
- May be required to attend training out of town.
- Performs a variety of general office support duties such as processing mail and answering the telephone.

**EMPLOYMENT STANDARDS:**

**Knowledge of:**

- Basic supervisory principles and practices.
- Processes and procedures related to assessment document processing and the production of secured and unsecured assessment rolls.
- Use of specified computer applications involving word processing, data entry and/or standard report generation.
- Business letter writing and the standard format for typed materials.
- Business arithmetic.
- Correct business English, including spelling, grammar and punctuation.
- Standard office practices and procedures, including filing and the operation of standard office equipment.
- Techniques for dealing with the public, in person and over the telephone.
- Record keeping principles and practices.

**Skill in:**

- Performing technical and complex work related to the processing of assessment documents and the production of secured and unsecured assessment rolls.
- Composing correspondence independently or from brief instructions.
- Entering numerical and related information into a computer system with speed and accuracy.
- Explaining complex assessment rules and procedures to the public, in person and over the telephone.
- Meeting critical time deadlines.
- Using initiative and independent judgment within established procedural guidelines.
- Making accurate and rapid arithmetic calculations.
- Maintaining accurate office files.
- Establishing and maintaining effective working relationships with other departments within and outside the county.

**Ability to:**

- 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 rate of 45 words per minute from printed copy.
- Learn State revenue and taxation laws governing the preparation of the assessment roll.
- 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 45 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:**

**MINIMUM:** Equivalent to graduation from high school AND three (3) years of experience in an office support position related to the assessment of property for tax purposes.

**PREFERRED:** In addition to the above minimum requirements, related experience in a California County setting and/or college coursework in a related field.

**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

Human Resources Approval: Analyst  
Date:

Signature: \_\_\_\_\_

Signature: \_\_\_\_\_