

## CLASS SPECIFICATION



**CLASS:** Real Property Transfer Analyst I/II  
**ALLOCATION:** Assessor  
**FLSA STATUS:** Non-Exempt  
**UNION AFFILIATION:** YCEA

**Established:** March 2006  
**Revised (title):** September 2018

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### **JOB SUMMARY:**

Under limited direction, researches and analyzes various legal documents to determine changes of ownership, and complex chain of title situations in order to make a decision on the need for property reassessment; answers questions from affected property owners and the public regarding the processing and transfer of real property deeds and property reassessment decisions; maintains records or statistics related to documents processed and decisions made; may direct the work of subordinate assessment office support staff on a project or day-to-day basis and train the less experienced assessment support staff; performs other duties as assigned.

### **CLASS CHARACTERISTICS:**

**Real Property Transfer Analyst I:** This is the entry level in the Real Property Transfer Analyst class. This level is distinguished from the journey level of Real Property Transfer Analyst II by the performance of the more routine tasks and duties as experience is gained. Incumbents at level I are not initially expected to perform with the same independence of direction and judgment on matters as allocated to the journey level. Positions may be staffed at either the entry or journey level. Incumbents may advance to the Real Property Transfer Analyst II level after gaining experience and demonstrating proficiency which meets the qualifications for the journey level.

**Real Property Transfer Analyst II:** This is the full journey level in the Real Property Transfer Analyst class. Positions at this level are distinguished from the Real Property Transfer Analyst I by the level of responsibility assumed, complexity of duties assigned, independence of decisions and action taken, by the amount of time spent performing the duties and by the nature of the public contact made. Incumbents perform the most difficult and responsible duties providing technical supervision over subordinate staff and performing the most complex real property transfer analysis in order to make property reassessment decisions. Incumbents at this level are required to be fully trained in all procedures related to the assigned area of responsibility.

The Real Property Transfer Analyst I/II reports to the Assessment Supervisor or Assistant Assessor and is distinguished from Assessment Specialist in that the Real Property Transfer Analyst performs the most difficult and complex duties requiring a higher level of independent research, analysis and decision making and consequence of error related to processing complex real property deed transfers and changes of ownership.

### **EXAMPLES OF DUTIES:**

*The level at which duties are performed is based on the position level as indicated under Class Characteristics. Duties may include, but are not limited to, the following:*

#### **Essential:**

#### **Real Property Transfers**

- Researches and analyzes various legal documents in order to determine changes of ownership, and decipher complex chain of title situations in order to make a decision on the need for property reassessment
- Determines necessity for additional documentation in order to make decisions and initiates a search for items such as affidavits of death, court documents, lot line adjustments, maps, obituaries, estate planning and financial documents, real property contracts, etc.
- Analyzes documents that reflect highly sophisticated and complex changes of ownership
- Performs extensive research to determine complex changes of ownership; applies Revenue and Taxation codes and property tax rules in relation to changes of ownership
- Reviews changes to the State Revenue and Taxation Code and Property Tax Rules for impact to County procedures and recommends departmental procedural changes
- Interprets legal descriptions based on property descriptions

### **Oral and Written Communication/Interpersonal Interactions**

- Contacts legal and tax professionals, title companies, County Counsel, Senior Counsel at State Board of Equalization, County Recorder, County Planners and others as necessary to gather information, discuss complex title transfers, and provides information to support decisions to grant or deny reassessment exclusions
- Responds to difficult questions from affected property owners, occasionally in stressful and confrontational situations, regarding the processing and transfer of real property deeds and property reassessment decisions rendered; Independently answers complex technical ownership questions
- Answers questions and 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 the application of the Government Code, Revenue and Taxation Code, or other statutes and regulations, policies and procedures and advising on actions to be taken as a result of the information contained in documents
- Builds and maintains positive working relationships with co-workers, other County departments and employees, the public, taxpayers, attorneys, tax professionals and relevant boards and commissions
- Composes correspondence to request additional documentation such as corporate, partnership and LLC documents, estate planning and revocable and irrevocable trusts, lease agreements and other private real property contracts in order to determine chain of title and change of ownership status in relation to need for reassessment

### **Administrative**

- Prepares correspondence, reports, forms and specialized documents related to the assessment process
- Maintains binders of the Assessor exclusion forms for Propositions 58, 60, and 193 including the supporting documentation for decisions granted or denied, actions taken, percentages excluded and amounts excluded in order to report to the State Board of Equalization
- Maintains current records, logs, files and statistical information pertaining to documents processed
- Receives and reviews change of ownership forms, exclusion forms and similar documents from property owners over a public counter or by mail

### **Support Staff Training and Direction (Level II only)**

- Trains, assigns and reviews the work of support staff; reviews work for quality standards
- Develops and implements procedures to increase efficiency; advises staff as to procedural changes

### **Important Duties:**

- Comply with all County equipment and safety policies and procedures, and California Occupational Safety and Health Administration (CalOSHA) rules and regulations
- Use standard office equipment, including a computer, in the course of the work; drive a County or personal motor vehicle as necessitated by work assigned

### **EMPLOYMENT STANDARDS:**

#### **Real Property Transfers**

##### **Level I**

##### **General Knowledge of:**

- Various types of recorded documents and their effect on ownership of property
- Processes and procedures related to assessment documents.
- Familiarity with maps and basic map terminology
- General legal terminology as it relates to real estate
- General familiarity with State Revenue and Taxation Code and Property Tax Rules
- General familiarity with State Propositions affecting reassessment of real property transfers
- General familiarity with methods of holding Real Property

**Level II** In addition to the above:

**Thorough knowledge of:**

- Specific documents processed and the appropriate actions to be taken based upon the requirements of applicable statutes and regulations
- Methods of holding real property
- Applicable sections of the Revenue and Taxation Code, Government Code, rules and regulations pertaining to the transactions required by documents processed
- Statutory and regulatory real estate law as it pertains to title and ownership of real property
- Property tax law concerning the change of ownership of real property for purposes of reappraisal
- Revenue and Taxation Code and Property Tax Rules established by the State Board of Equalization
- Legal terms that relate to real estate and probate of property

**Written and Oral Communication/Interpersonal Interactions**

**Level I**

**General Knowledge of:**

- Techniques for dealing with the public, in person, by letter and over the phone
- Ways to interact in a professional way with attorneys, tax professionals and boards and commissions
- Ways to respond to difficult questions in stressful and confrontational situations
- Methods of composing correspondence regarding requests for legal documents such as trusts, lease agreements and contracts

**Level II** In addition to the above:

**Thorough knowledge of:**

- Ways to interact with individuals in difficult situations without eliciting negative or hurt feelings and ways to defuse hostile persons or situations
- Ways to answer difficult or hostile questions factually but diplomatically

**Administrative**

**Level I**

**General Knowledge of:**

- 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
- Record keeping principles and practices
- Correct business English, including spelling, grammar and punctuation
- Standard office practices and procedures and use of standard office equipment
- Basic maintenance of binders and preparation of correspondence, reports and documents related to the assessment process

**Administrative (Cont'd)**

**Level II** In addition to the above:

**Thorough knowledge of:**

- Preparation of correspondence, reports, forms and specialized documents related to the assessment process
- Maintenance of binders of the Assessor exclusion forms for Propositions 58,60 and 193 including the supporting documentation for decisions granted or denied, actions taken, percentages excluded and amounts excluded in order to report to the State Board of Equalization

**Support Staff Training and Direction**

**Level II Only**

- Principles and practices of providing lead direction, work planning, organization, employee training

- Principles and practices of assigning and reviewing the work of others

**Skill in/Ability to:**

**Real Property Transfers**

**Level I**

- Perform the more routine work related to property transfer and exclusion duties
- Search source documents to resolve problems and errors
- Use initiative and judgment to solve difficult problems within established procedural guidelines
- Interpret and apply regulations, laws, policies and procedures affecting exclusions and the transfer of real property
- Read and understand legal descriptions of real property
- Identify methods and documents used to convey and transfer title of real property
- Apply methods and techniques necessary for researching, organizing and evaluating data
- Recognize when more information is necessary and where to obtain information
- Focus on details

**Level II** In addition to the above in Level 1:

- Perform the most complex and difficult work related to the processing of assessment documents
- Independently interpret and apply complex information
- Interpret and understand the State Revenue and Taxation Code and the principles and practices of real estate law
- Perform research via government codes and the internet to find information regarding individuals, deaths, family relationships
- Analyze real property contracts, lease and rental agreements, real property sale contracts, estate planning documents, court orders, legal descriptions, financial records, and all recorded documents pertaining to the transfer and/or ownership of real property and determine appropriate action
- Follow and verify complex legal descriptions pertaining to real property

**Oral and Written Communication/Interpersonal Interactions**

**Level I**

- Learn to explain assessment rules and procedures to the public
- Learn to explain specific codes, laws, ordinances, legal documents and technical terminology
- Establish and maintain effective working relationships with those encountered during performance of assigned duties
- Listen carefully to what other people are saying, take time to understand the points being made, and ask questions as appropriate for clarification

**Level II** In addition to the above in Level I:

- Explain the most complex laws and codes within the California property tax system
- Communicate with awareness of the needs of others such as grieving taxpayers at the beginning stages of learning to handle their affairs
- Communicate competently and effectively in writing and verbally as appropriate for the needs of the individual or audience
- Effectively use interpersonal skills in a tactful, patient and courteous manner with a variety of people and a variety of situations

**Administrative**

**Level I**

- Compose correspondence independently or from brief instructions
- Prepare clear, concise and organized written reports, correspondence and other materials
- Enter information into a computer system with speed and accuracy
- Maintain accurate office files
- Make accurate arithmetic calculations

- Meet critical time deadlines

**Level II** In addition to the above in Level 1:

- Develop new processes and procedures when necessitated by law or rule changes
- Find ways to increase efficiency for researching and locating necessary documents

**Support Staff Training and Direction**

**Level II Only**

- Provide lead direction over assigned staff; effectively train staff
- Set priorities for staff
- Anticipate problems, take steps to alleviate
- Guide and motivate staff

**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 functions of the job, with or without accommodation. Prospective employees must complete a pre-employment medical exam 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.
- Stamina to remain seated, stand and/or retain concentration for an extended period of time.
- Mobility to drive a motor vehicle
- Climb a step ladder

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 setting
- May be required to travel to various meetings or classes

**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.

**Licensing and Certification:**

- Ability to obtain a valid California Class C driver's license within ten (10) days of employment, and maintain throughout employment

**Special Requirements:**

- Must successfully complete an extensive and thorough background investigation which may include Live Scan fingerprinting prior to hire
- DMV printout prior to hire
- Must file statements of economic interest with the Yuba County Clerk/Recorder.
- Will be required to perform disaster service activities pursuant to Government Code 3100-3109.

**Education and Experience:**

The minimum and preferred requirements for this position are described below

**Real Property Transfer Analyst I:**

**Minimum:** Equivalent to graduation from high school and four (4) years of related experience working with legal documents in an Assessor’s office, Recorder’s office, title company, mortgage broker, real estate office, surveying office or law office **OR** 1 year of college (30 units) with related coursework such as real estate, tax, legal terminology, and math and two (2) years related experience as previously defined.

**Preferred:** In addition to the Real Property Transfer Analyst I minimum requirements, additional years of related experience as previously defined.

**Real Property Transfer Analyst II:**

**Minimum:** In addition to the Real Property Transfer Analyst I minimum requirements, two (2) years of experience equivalent to the County's class of Real Property Transfer Analyst I.

**Preferred:** In addition to the Real Property Transfer Analyst II minimum requirements, additional years of related experience equivalent to the County’s class of Real Property Transfer Analyst II and additional college units in a related field as previously defined.

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

Approval: Department Head Stephen Duckels  
Date:

EEOC: F  
WC: 9410

Human Resources Approval: Analyst  
Date:

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

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