



CLASSIFICATION NO. 067

Established: 5/90

Revised: 4/08, 5/19, 10/20

FLSA: Non-Exempt

EEO: 6

ASSESSMENT AND TAXATION SPECIALIST 1

CLASS CHARACTERISTICS

Under supervision, to provide customer assistance and information; to process and maintain a variety of records and documents relating to assessment and taxation of real and personal property; and to do other work as required.

DISTINGUISHING CHARACTERISTICS

The Assessment and Taxation Department is responsible for the mapping and appraisal of property in the County, the preparation of property assessment and taxation rolls, and the collection and distribution of property taxes. This department provides services to all government jurisdictions in the County, including schools, cities and special taxing districts.

The Assessment and Taxation (A&T) Specialist 1 is the first level within the A&T Specialist classification series. Incumbents provide customer service regarding assessment and taxation records in accordance with department procedures, regulations and laws governing real and personal property. Incumbents accept applications and other documentation, update computerized assessment and taxation records, review documents for errors, handle cash and receipt payments, retrieve, file and scan documents, and provide assistance to A&T Specialist 2 staff on a cyclical assignment basis in support of maintaining the assessment and tax property records.

The A&T Specialist 1 differs from the A&T Specialist 2 which has greater independence and primary responsibility for a specific property tax function requiring specialized knowledge in assessment and taxation. The A&T Specialist 1 differs from the Office Specialist classifications which performs a variety of moderately difficult administrative support activities according to generally established guidelines, regulations or instructions but not related to specialized assessment and taxation functions.

TYPICAL TASKS

Duties may include but are not limited to the following:

1. Provides customer assistance and information; receives requests and questions from the public, other County departments and related business agencies via telephone, in person and on-line; forwards, processes and answers questions regarding assessment and taxation department procedures and regulations according to established guidelines, regulations, instructions and statutes; assists customers with questions regarding information contained in the assessment and taxation records such as property values and taxes.

2. Receives and verifies that required documents accompany a variety of applications or returns; locates property on a map or in a database; researches and retrieves archived information; prepares and copies requested public service documentation such as maps, deeds, appraisals, and summary sheets.
3. Codes and enters data in a variety of software applications regarding change in ownership or mailing address, and inventory and characteristics for real or personal property.
4. Cashiers and receipts property tax payments in database software; collects and receipts fees or payments for a variety of charges; prepares bank deposits; balances cash drawer.
5. Maintains and retrieves files for a variety of records; scans, identifies and files documents; opens and distributes mail to appropriate staff or work section.

REQUIRED KNOWLEDGE AND SKILLS

Working knowledge of: Assessment and taxation laws, rules and regulations governing real and personal property; public and customer service techniques; office operations, procedures, and equipment; cash handling procedures; business math; English spelling, punctuation, grammar and composition.

Skill to: Provide assistance and information to customers; answer and route calls appropriately within department; accurately perform assigned work following established procedures and policies; effectively communicate, both orally and in writing; work effectively in a multi-task, and detail and deadline driven environment; handle a high volume of customers via telephone, in person and on-line; perform data entry and arithmetic calculations with speed and accuracy; effectively operate office equipment, personal computers and software applications including databases, spreadsheets, word processing and imaging software; establish and maintain effective working relationships with the public, title companies, government agencies, staff and other County employees.

MINIMUM QUALIFICATIONS

Minimum qualifications are used as a guide for establishing the minimum experience, education, licensure, and/or certifications required for employment in the classification. The following minimum qualifications are established for this classification. Additional minimum qualifications and special conditions may apply to a specific position within this classification and will be stated on the job announcement.

Experience: A minimum of one (1) year of related experience that would provide the required knowledge and skills to perform the responsibilities of this position.

Licenses/Certifications: None required.

OTHER INFORMATION

The Assessment and Taxation Department maintains a conflict of interest policy regarding active real estate licenses and certified fee appraisers. Incumbents may not practice within Clackamas County.