



CLASSIFICATION NO. 068

Established: 5/90

Revised: 4/08, 5/19

FLSA: Non-Exempt

EEO: 06

## **ASSESSMENT AND TAXATION SPECIALIST 2**

### **CLASS CHARACTERISTICS**

Under general supervision, to have primary responsibility for a specific property tax function; to perform complex recordkeeping tasks in the processing and maintenance of 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 2 incumbents are assigned to a specialized property tax function and have primary responsibility for that function. Incumbents perform a variety of complex record keeping tasks including compiling and maintaining assessment and taxation records using complex software applications, coordinating with other Department work sections, and providing customer service regarding assessment and taxation records in accordance with department procedures, regulations, and laws governing real and personal property. Incumbents also train and review the work of cyclically or project assigned A&T Specialist 1 staff.

The A&T Specialist 2 differs from the A&T Specialist 1 which primarily focuses on providing initial customer service. The A&T Specialist 2 also differs from the A&T Specialist, Senior which, for property records or tax revenue, plans, leads and coordinates all programs, functions, processes and regularly assigned A&T Specialist 1 & 2 staff.

### **TYPICAL TASKS**

Duties may include but are not limited to the following:

1. Provides technical information related to property assessment and taxation, and specific property tax function; advises and provides direction to A&T Specialist 1's when assigned to function to perform cyclical support work; receives and responds to requests and questions from the public, related business agencies, internal customers, other County departments, and government agencies via the telephone, in person and on-line; answers questions regarding assessment and taxation departmental procedures and regulations according to established guidelines, regulations, instructions, and statutes; provides information contained in the assessment and taxation records.

2. Performs a variety of record keeping and quality control activities for an assigned specialized property tax function such as tax exemptions, deferrals, permits, property boundary changes, ownership and addressing, manufactured structures, sales confirmations, bankruptcies, delinquent tax collections, tax warrants, tax refunds, foreclosures, value appeals supports, business personal property records, etc.; navigates, reviews, creates, calculates, documents, and modifies data using several complex software applications.
3. Provides technical information and explains program and eligibility functions and procedures; examines records and conducts research; verifies filing requirements; determines if qualifications are met; conducts site inspections as needed.
4. During predicted cyclical work activities or for a defined project, trains, assigns and reviews work of A&T Specialist 1 staff assigned to assist within specialized function; prioritizes and monitors cyclical support assignments typically involving coding and entering data into a variety of software applications; provides guidance and direction; oversees large and complex mailing processes for a variety of assessment and tax processes.
5. Performs variety of complex tasks including calculations for taxing purposes and review of eligibility requirements; verifies compliance with Oregon Revised Statutes.

### **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; business math; cash handling procedures; documents and records relating to property ownership; lead work techniques; English spelling, punctuation, grammar and composition.

Skill to: Independently review, verify and make decisions regarding specialized function; accurately perform work following established procedures, policies, and guidelines; 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; effectively communicate technical information, both orally and in writing; work effectively in a multi-task, and detail and deadline driven environment; establish and maintain effective working relationships with the public, title companies, government agencies, staff and other County employees; provide assistance and information to customers; handle a high volume of customers via telephone, in person and on-line.

### **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 two (2) years of related experience that would provide the required knowledge and skills to perform the responsibilities of this position.

**Licenses/Certifications:** None required.

## **PRE-EMPLOYMENT REQUIREMENTS**

Driving may be necessary for County business. For position(s) with occasional/incidental driving, incumbents must possess a valid driver's license. Accommodation requests for an acceptable alternative method of transportation will be reviewed on an individual basis in compliance with State and Federal legislation. For position(s) with regular driving, incumbent(s) must also possess and maintain an acceptable driving record throughout the course of employment.

## **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.