



CLASSIFICATION NO. 069
Revised: 5/90, 1/94, 4/08, 5/19
FLSA: Non-Exempt
EEO: 6

ASSESSMENT AND TAXATION SPECIALIST, SENIOR

CLASS CHARACTERISTICS

Under direction, to plan, lead and coordinate assigned staff and allocate resources to programs and processes within assigned area of responsibility, specifically property records or tax revenue; to review, reconcile, balance, correct and maintain assessment and tax accounts; to prepare and review records, documents and reports relating to the 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, Senior is the highest level within the A&T Specialist classification series. Incumbents lead the work of assigned staff, establish priorities and standards to ensure compliance with statutory requirements for all programs and processes within their area of responsibility, and provide advanced, complex administrative support in the preparation, accounting, processing and quality control of the assessment and taxation rolls or the collection and distribution of tax monies. Responsibilities include maintaining, extracting and verifying data, analyzing tax district budgets and calculating tax rates, performing quality control and report writing and analysis during preparation of the assessment roll and creation of tax statements, maintaining and balancing tax accounts, and/or monitoring data for quality control.

The A&T Specialist, Senior differs from the A&T Specialist 2 which has responsibility for a specific property tax function and cyclically assigned staff, but does not coordinate programs and processes and allocate staff and resources among several property tax functions.

TYPICAL TASKS

Duties may include but are not limited to the following:

1. Leads the work of assigned A&T Specialist staff; schedules, assigns and reviews work, provides direction and training; prioritizes assignments; resolves technical or procedural problems and issues; provides input to supervisor regarding work performance.
2. Provides advanced administrative support to department operations; develops and recommends policies, procedures and system improvements.

3. Provides public and technical customer service support via telephone, in person, on-line and written correspondence; accesses computer records and files to research taxes owed, assessed values, map descriptions and property ownership; provides information on assessment and tax laws, department policies, payment procedures and a variety of programs available to taxpayers; serves as liaison with title companies, mortgage companies and other government agencies.
4. Assists Taxation Analyst and participates in the processing of taxing district budgets and the certification of the assessment roll; oversees maintenance and accuracy of property records; collects, analyzes and verifies data, including levy amounts and tax values by district, tax code and property type; computes and balances tax rates; compiles data and prepares reports for submittal to the Oregon Department of Revenue; prepares final statement of taxes levied.
5. Oversees, reviews and verifies quality control of data within the assessment and taxation records; writes and runs queries; analyzes data to ensure accuracy and completeness of assessment records.
6. Oversees collection of tax revenues; reviews and verifies cash receipts; balances payments and postings; posts and balances automated and on-line payment batches; posts payments and refunds; balances credits to delinquent years; prepares daily, monthly and tax year reports.
7. Oversees the correction of errors in tax accounts; identifies misapplied funds and transfers payments to different accounts or tax years; oversees refunds and corrective journal entries.

REQUIRED KNOWLEDGE AND SKILLS

Working knowledge of: Assessment and taxation laws, rules, and regulations governing real and personal property; principles and techniques of accounting; business math; public and customer service techniques; data processing hardware and software applicable to department operations; office operations, procedures, and equipment; mapping and property classification systems; legal terminology, documents and records relating to property ownership; record keeping techniques; basic techniques of supervision; English spelling, punctuation, grammar and composition.

Skill to: Interpret and apply laws, rules and regulations related to assessment and taxation; evaluate budget, accounting and data control documents for accuracy and conformity to State and County requirements; prepare, research, identify and correct documents, accounts and reports; perform arithmetical calculations with speed and accuracy; compute tax rates, discounts, interest and penalties; monitor and audit tax accounts; lead, plan and schedule work of assigned staff and projects; establish and maintain effective working relationships with the public, title companies, government agencies, staff and other County employees; read and interpret maps and real estate documents; effectively operate office equipment, personal computers and software applications including databases, spreadsheets, word processing and imaging software; implement and maintain record keeping systems and procedures; process, index, file and retrieve documents, records, forms and maps; effectively communicate technical information, both orally and in writing; work effectively in a multi-task, and detail and deadline driven environment; apply judgment within established parameters.

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 three (3) 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.