



CLASSIFICATION NO. 070  
Established: 2/09  
FLSA: Non-Exempt  
EEO: 3

## **TAXATION ANALYST**

### **CLASS CHARACTERISTICS**

Under direction, to calculate the entire annual property tax roll and to ensure its accuracy; to provide guidance and assistance to taxing districts on property tax calculation and forecasting matters; to assign and review work of other staff for taxation projects; and to do other work as required.

### **DISTINGUISHING CHARACTERISTICS**

The Assessor's Office 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 Office provides services to all government jurisdictions in the County, including schools, cities and special taxing districts.

The Taxation Analyst classification is focused on calculating the entire annual tax roll to be in compliance with the proper levies and state statutes and laws regarding property taxes. The incumbent performs calculation, analysis, forecasting, troubleshooting, reporting and quality control activities relating to the set up and calculation of the annual tax roll, and assigns, reviews and coordinates the work of other staff in regard to taxation projects and processes.

The Taxation Analyst differs from the Assessment and Taxation Clerk 3 which performs complex administrative support as it relates to data processing control, collection and correction of tax accounts, but does not adjust levies for tax roll calculation, including for urban renewal districts and annexations, does not analyze taxing district budgets, and does not forecast tax revenues for taxing districts. The Taxation Analyst differs from the Assessment and Taxation Supervisor which oversees the compilation of the annual assessment and taxation rolls, or the collection and distribution of property taxes and has full supervisory authority.

### **TYPICAL TASKS**

Duties may include but are not limited to the following:

1. Oversees all aspects of the annual tax roll calculation; creates and maintains complex computer spreadsheets and databases for rate calculation, data analysis and reporting; enters new and updated levy calculation formulas into Assessment and Taxation computer system; conducts statistical and computerized tests to ensure compliance with state property tax statutes; conducts quality assurance of the Assessment and Taxation computer system to ensure accurate calculation of the annual tax roll; analyzes and corrects complex errors in tax accounts.

2. Acts as main liaison with taxing districts; reviews budget documents from taxing districts for accuracy and completeness; assists districts in budget forecasting by performing data and statistical analysis; provides guidance and answers questions on how tax is calculated.
3. Ensures annexations and urban renewal districts are properly set up and maintained in the Assessment and Taxation computer system; conducts tests to verify annexations and urban renewal districts are properly calculated for taxation; researches and troubleshoots discrepancies and makes changes to computer system to ensure proper calculation.
4. Prepares detailed reports for the Oregon Department of Revenue and for other County departments; provides detailed analyses and historical data to departmental auditors in order to monitor in-house assessment and tax functions; provides support to district auditors and other tax agencies.
5. Researches and presents recommendations at regional and state meetings concerning work-flow processes and improvements relating to tax laws and concepts; provides research and administrative support to Assessor on taxation projects and processes.
6. Assigns, schedules, coordinates, reviews work of other Assessment, Tax and Cartography staff as directed and oversees the completion of a variety of work and/or projects by other staff; trains or coaches other employees; may provide input to staff performance evaluations.
7. Provides public and technical customer service support; accesses computer records and files to research taxes owed, assessed values, maps descriptions and property ownership; assists utility companies in assigning their property to the proper tax district and ensures proper tax is applied; provides information on assessment and tax laws, department policies, payment procedures and a variety of programs available to taxpayers.

## **REQUIRED KNOWLEDGE AND SKILLS**

Thorough knowledge of: Property tax roll calculation methods and techniques.

Working knowledge of: Assessment and taxation laws, rules, and regulations governing real property, personal property, tax district budgeting, and urban renewal districts; tax reporting requirements for the Oregon Department of Revenue; principles and techniques of accounting; business math and statistics; public and customer service techniques; principles and practices of database management; principles and techniques of tax revenue forecasting; tax 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 accounts, reports and documents; identify, analyze and correct tax roll calculation errors; make arithmetical and statistical calculations with speed and accuracy; compute tax rates, discounts, interest and penalties; use spreadsheet software to organize, calculate, verify and report data; plan, assign and schedule work projects and staffing assignments; establish and maintain effective working relationships with the public, title companies, utility companies, government agencies, staff and other County employees; read and interpret maps and real estate documents; effectively

operate office equipment, design and run database queries and reports; implement and maintain record keeping systems and procedures; effectively communicate technical information both orally and in writing; work effectively in a multi-task 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 four (4) 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.

Edited: 7/12