

**NOTICE OF PROPOSED CLASSIFICATION ACTIONS BY  
THE HUMAN RESOURCES DIRECTOR**

The following actions are being posted in accordance with Rule 109. In the absence of requests to meet addressed to the Human Resources Director, the proposed changes will become final seven (7) calendar days from the posting date.

**Posting No:** 32  
**Fiscal Year:** 2008/2009  
**Posted Date:** June 26, 2009  
**Reposted Date:** **March 30, 2010**

***ESTABLISH THE FOLLOWING JOB SPECIFICATION(S):***  
***(Draft job specifications attached.)***

<b>Item #</b>	<b>DEPT/ DIVISION</b>	<b>Class/Title</b>
1	ASR	8111 Senior Recordable Documents Office Specialist \$51,844.00 A \$63,024.00 <b>(\$66,175 Step 6 and \$69,484 Step 7 – Based on approved criteria)</b>
2	ASR	8110 Recordable Documents Office Specialist \$46,930.00 A \$57,044.00
3	ASR	8107 Assessor-Recorder Office Assistant \$42,276.00 A \$51,350.00
4	ASR	4205 Senior Assessment Services Office Specialist \$51,844.00 A \$63,024.00

**Posting No:** 32  
**Fiscal Year:** 2008/2009  
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<b>Item #</b>	<b>DEPT/ DIVISION</b>	<b>Class/Title</b>
5	ASR	4204 Assessment Services Office Specialist \$46,930.00 A \$57,044.00

**For additional information regarding the above proposed action, please contact Cathy Abela at (415) 557-4933 or email her at [Cathy.Abela@sfgov.org](mailto:Cathy.Abela@sfgov.org).**

Requests to meet on an item should be addressed to the Human Resources Director, 1 South Van Ness, 4th Floor, San Francisco, CA 94103. All requests must be received in writing no later than close of business seven (7) calendar days from the posting date. FAX'd copies will be accepted as timely with original to follow. Copies of this notice may be obtained from the Information Center, 1 South Van Ness, 4th Floor or from DHR's website at:

<http://sfdhr.org/index.aspx?page=109>

**cc:** All Employee Organizations  
All Departmental Personnel Officers  
Anita Sanchez, CSC  
Harvey Rose, Budget Analyst  
Christina Fong, DHR  
Carmela Villasica, DHR  
Linda Cosico, DHR  
RAS Team Leader(s)  
DHR Support Services  
Martin Gran, DHR  
Steve Ponder, DHR  
Cathy Abela, DHR  
File

**8111 RECORDABLE DOCUMENT EXAMINER**

**DEFINITION**

Under direction, performs highly specialized office technical work requiring in-depth knowledge and a high level of independence involving complex document recording processes within the Assessor-Recorder's Office; performs detailed and complex document examination to ensure sufficiency, completeness, jurisdiction, appropriateness for recording, and/or adherence to legal codes and state and county recording requirements; computes and receives document recording fees and upfront transfer tax in real-time based on California Revenue and Taxation Codes, State and local tax laws and ordinances, including the Transfer Tax Ordinance, the Revenue and Taxation Code and the Code of Federal Regulation; identifies, analyzes, researches and computes transfer tax on undervalued and unrecorded transactions, in compliance with State and local tax laws and ordinances, for the purpose of capturing additional revenues for the City; performs general accounting duties for the office; provides complex technical information to customers regarding the laws, regulations, policies and procedures pertaining to recording requirements; provides follow up with customers as appropriate to resolve problems; and performs related duties as required.

**DISTINGUISHING FEATURES**

This is a highly specialized office technical class used in the Assessor-Recorder's Office. Incumbents in this class must have an in-depth knowledge of all recording laws and exercise a high level of independence in interpreting and applying such laws as they relate to the recording of documents and the collection of Transfer Taxes. Duties typically emphasize the examination for recordability of legal documents and processes as well as specialized customer support and are performed with substantial independence, at the recording window, in accordance with legal requirements and departmental policy.

This class may be distinguished from the lower-level class of Recordable Documents Office Specialist because incumbents in this class perform technical duties that require advanced knowledge and decision making pertaining to difficult document examination and recording processes.

**EXAMPLES OF IMPORTANT AND ESSENTIAL DUTIES**

*According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this class, but are not intended to be an inclusive list.*

1. Performs specialized office technical duties pertaining to the examination and recording of legal documents; interprets various codes, statutes and ordinance in examining and recording a wide variety of complex documents; receives, examines, evaluates and records deeds, reconveyances, liens, judgments, and a wide variety

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**8111 RECORDABLE DOCUMENT EXAMINER**

of other documents; performs detailed and complex document examination to ensure sufficiency, completeness, jurisdiction, appropriateness for recording, and/or adherence to legal codes and state and county recording requirements; provides follow up with customers and other parties as appropriate to resolve problems; refers customers to other Office staff and/or outside agencies as required.

2. Ensures compliance with the Transfer Tax Ordinance by reviewing change of ownership transactions; requests and analyzes documentation of proof of exemption; and collects transfer taxes in accordance with the Revenue and Taxation Code and State and local tax laws and ordinances.
3. Performs complex transfer tax audits by reviewing documents to be recorded and transfer tax affidavits to ensure appropriate transfer tax has been paid; collects documentary transfer tax, audits and analyzes change of ownership transactions, calculates transfer tax amount payable; analyzes claims for transfer tax exemptions and requests for refunds; requests and evaluates written documentation of proof of exemption and requests for refunds; initiates collection actions; reviews and discusses audit findings with parties involved; records tax liens against properties; may testify in court on behalf of department.
4. Provides complex technical information in person, on the phone, and via email and regular mail to attorneys, title companies, government agencies, the public and others regarding assessment and recording laws, regulations, policies and procedures; communicates corrective actions needed to make documents recordable; requests additional information as needed to satisfy recording requirements.
5. Receives and collects payments of recordable documents; balances cash receipts and receivables; prepares balance sheets and processing forms; posts receivables and credits appropriate accounts; and deposits revenue to the Treasurer's Office.
6. Files liens on properties on behalf of the City/County when required taxes have not been paid.
7. May provide information to managers by compiling, organizing and distributing documents and information; may research, tabulate and summarize data and information; may create reports, letters, forms and other documents, proofreading and checking materials for accuracy, completeness and compliance with policies and procedures.
8. May serve as a lead worker by directing and monitoring the work of a small group of subordinate employees and serving as a technical resource regarding the more complex work issues in the unit. May be required to provide training to entry level classifications.

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### **8111 RECORDABLE DOCUMENT EXAMINER**

9. Operates personal computers, computer terminals and other standard office equipment; utilizes word processing, spreadsheet and/or database software.
10. Performs other general office administrative duties; attends meetings and trainings; may serve on committees and task forces.
11. Performs other related duties as assigned.

### **JOB RELATED AND ESSENTIAL QUALIFICATIONS**

#### **Knowledge of:**

- o Federal, State and local laws pertaining to the recording of documents
- o Laws pertaining to property ownership and transfer
- o Legal property descriptions
- o Methods and documents used to convey and transfer title to property
- o Basic legal terminology
- o Standard office practices and procedures
- o Principles and practices pertaining to public administration
- o Principles, practices and methods of customer service
- o Business data processing, including the uses of standard computer hardware and software
- o Correct English usage including grammar, spelling and punctuation
- o Standard arithmetic including addition, subtraction, multiplication, division, fractions and percentages
- o Record keeping principles and practices

#### **Ability to:**

- o Read and understand documents in order to determine whether or not they meet legal criteria for recordability
- o Understand and apply the laws and regulations pertaining to examining and recordability of documents in a County Recorder's Office
- o Identify barriers to recording a document and propose appropriate solutions
- o Read and comprehend legal terminology on various forms, letters and other documents
- o Explain and apply specialized policies, procedures, forms and concepts pertaining to document recording
- o Make independent judgment in recording documents using a wide variety of government codes and regulations.
- o Perform detailed and accurate office work
- o Provide courteous and effective customer service to a wide variety of people
- o Organize and maintain data, files and records
- o Type letters, forms and other documents
- o Make arithmetic computations
- o Understand and carry out oral and written instructions
- o Establish and maintain effective working relationships with others
- o Operate standard office equipment

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**8111 RECORDABLE DOCUMENT EXAMINER**

- o Use various office automation tools such as word processing, database and spreadsheet applications

**Experience and Training Guidelines:**

Two years equivalent to a Recordable Documents Office Specialist in the City/County of San Francisco. **OR**

Four years of progressively responsible office support experience, including at least two years in a legal or title company office setting that provided familiarity with preparing, examining and searching for legal documents as well as extensive contact with the public.

**Substitutions:**

1) completion of coursework from an accredited college or university may substitute for a maximum of one year of the above-required, non-legal office experience, where 15 semester (or equivalent quarter) units is equivalent to six months of experience; **OR**

2) completion of a vocational clerical training program (at least 240 hours) may substitute for six months of the above-required experience; **OR**

3) Possession of Certificate of Recognition certifying that the applicant has successfully completed the Recordable Document Examiner course administered by the County Recorder's Association of California may be substituted for six (6) months of the required experience described in paragraph 2 of the Experience and Training Guidelines.

**AND**

Special Requirements: Depending upon assignment, some positions may require one or more of the following: a valid California driver's license; a valid typing certificate for 40 words per minute; bilingual skills; working on a seasonal basis; and/or working nights, weekends and holidays.

Origination Date:

**8110 RECORDABLE DOCUMENTS OFFICE SPECIALIST**

**DEFINITION**

Under general supervision, performs specialized clerical work pertaining to document recording processes within the Assessor-Recorder's Office; indexes recorded documents according to established codes and procedures; provides specialized customer service at a counter, over the phone, via electronic mail and/or through regular mail by answering the more difficult process-related questions and assisting customers with the location and retrieval of recorded documents; makes copies of recorded documents and sends/provides them to customers as requested, according to policy; may assist Office staff with researching, gathering and compiling information pertaining to either assessment or document recording activities; may serve as a lead worker by directing and monitoring the work of a small group of subordinate clerical staff; and performs related duties as required.

**DISTINGUISHING FEATURES**

This is a specialized clerical class used in the Assessor-Recorder's Office. Incumbents work under general supervision to perform a wide variety of specialized support duties that require familiarity with a variety of legal documents and processes. Primary duties emphasize specialized customer support, searching for and retrieving recorded documents, and/or indexing recorded documents. Alternatively or concurrently, incumbents may serve as lead workers with responsibility for directing and monitoring the work of subordinates on an ongoing and regular basis. Duties are performed with substantial independence in accordance with well-defined procedures.

This class may be distinguished from the lower-level class of Assessor-Recorder Office Assistant because incumbents in this class perform more complex and specialized clerical duties that require a broader knowledge base, and/or may serve as lead workers in their assigned work units.

This class may be distinguished from the higher-level class of Recordable Documents Office Technician because incumbents in the latter class perform more difficult and technical duties such as examining documents and approving them for recording.

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**8110 RECORDABLE DOCUMENTS OFFICE SPECIALIST**

**EXAMPLES OF IMPORTANT AND ESSENTIAL DUTIES**

*According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this class, but are not intended to be an inclusive list.*

1. Performs a wide range of specialized customer service duties in the Assessor-Recorder's Office; provides factual and procedural information to a wide variety of customers including attorneys, escrow agents, public and private companies, and the general public regarding laws, regulations, policies and procedures; assists customers on the phone, via e-mail and regular mail, and in person at the counter.
2. Responds to a wide variety of customer questions and requests, including those pertaining to difficult and complex searches for recorded documents, and the appraisal process, investigates change in ownership, transfers and chain of title, helps customers identify the specific type of document they are seeking; screens and reviews request forms for accuracy and completeness; provides instruction to customers regarding how to use computers and other equipment in order to locate and copy documents; provides direct assistance to customers who are unsuccessful in locating or obtaining documents themselves; refers customers to other Office staff and/or outside agencies as required.
3. Receives, opens, stamps and responds to mail; processes and responds to requests for deeds, liens, parcel maps, marriage licenses, judgments, and other documents; makes and provides copies based on customer requests and in accordance with policies and procedures; determines fees for providing certified and non-certified copies of documents; receives payments and issues receipts.
4. Indexes recorded documents; reads and reviews documents to determine document type; assigns computerized indexing codes to documents based on standardized coding references; enters document data into the indexing system; releases and transmits files to public computer stations as appropriate. May review and file marriage licenses and amendments in accordance with applicable laws.
5. Troubleshoots indexing problems; researches system to locate and correct indexing errors; prints reports to verify the accuracy of indexing assignments; participates in quality control activities that may include peer review and/or data auditing.
6. May serve as a lead worker by directing and monitoring the work of a small group of subordinate employees and serving as a technical resource



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### **8110 RECORDABLE DOCUMENTS OFFICE SPECIALIST**

regarding the more complex work issues in the unit. May be required to provide training to entry level classifications.

7. May assist managers and/or professional and technical staff by compiling, organizing and distributing documents and information, may research, tabulate and summarize data and information; may create reports, letters, forms and other documents, proofreading and checking materials for accuracy, completeness and compliance with policies and procedures.
8. Performs data entry to correct, verify, update, and maintain computerized information; logs, updates and tracks information; establishes, maintains and purges files and records according to established procedures.
9. Operates personal computers, computer terminals and other standard office equipment; utilizes word processing, spreadsheet and/or database software.
10. Performs other general office administrative duties; attends meetings and trainings; may serve on committees and task forces.
11. Performs other related duties as assigned.

### **JOB RELATED AND ESSENTIAL QUALIFICATIONS**

#### **Knowledge of:**

- o A wide variety of legal documents and their purposes
- o Basic laws, regulations, requirements and administrative procedures that apply to document recording
- o Basic legal terminology
- o Standard office practices and procedures
- o Principles and practices pertaining to public administration
- o Principles, practices and methods of customer service
- o Business data processing, including the uses of standard computer hardware and software
- o Basic principles of lead supervision, including how to motivate employees
- o Correct English usage including grammar, spelling and punctuation
- o Standard arithmetic including addition, subtraction, multiplication, division, fractions and percentages
- o Record keeping principles and practices

#### **Ability to:**

- o Learn and understand the laws and regulations pertaining to a County Recorder's Office
- o Assist customers in researching and locating documents in a computerized or manual system
- o Sort, file, retrieve, code and index documents using alphabetical, chronological and numerical filing systems

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### **8110 RECORDABLE DOCUMENTS OFFICE SPECIALIST**

- o Read and comprehend legal terminology on various forms, letters and other documents
- o Explain and apply specialized policies, procedures, forms and concepts pertaining to document recording
- o Lead the work of employees engaged in routine clerical activities
- o Perform detailed and accurate office work
- o Provide courteous and effective customer service to a wide variety of people
- o Organize and maintain data, files and records
- o Prioritize work for self and others, and perform multiple activities
- o Type letters, forms and other documents
- o Make arithmetic computations
- o Understand and carry out oral and written instructions
- o Establish and maintain effective working relationships with others
- o Operate standard office equipment
- o Use various office automation tools such as word processing, database and spreadsheet applications

#### **Experience and Training Guidelines:**

One year equivalent to an Assessor-Recorder Office Assistant in the City/County of San Francisco.

**OR**

Three years of progressively responsible office support experience, including at least one year in a legal or other office setting that provided familiarity with preparing, processing, filing and searching for legal documents as well as extensive contact with the public.

#### Substitutions:

1) completion of coursework from an accredited college or university may substitute for a maximum of one year of the above-required, non-legal office experience, where 15 semester (or equivalent quarter) units is equivalent to six months of experience; **OR**

2) completion of a vocational clerical training program (at least 240 hours) may substitute for six months of the above-required experience.

**AND**

Special Requirements: Depending upon assignment, some positions may require one or more of the following: a valid California driver's license; a valid typing certificate for 40 words per minute; bilingual skills; working on a seasonal basis; and/or working nights, weekends and holidays.

Origination Date:

## **CITY AND COUNTY OF SAN FRANCISCO**

### **8107 ASSESSOR-RECORDER OFFICE ASSISTANT**

#### **DEFINITION**

Under general supervision, performs general clerical and customer service work pertaining to the more routine appraisal, assessment and/or document recording processes within the Assessor-Recorder's Office; provides a variety of services and information to the public relative to routine property assessment and/or document recording matters; receives documents and reviews them for completion and accuracy according to established procedures; assists higher-level staff with basic research by locating, gathering, processing and compiling documents from computerized and/or manual records; provides basic information to the public regarding how to record, archive, and retrieve legal documents; and performs related duties as required.

#### **DISTINGUISHING FEATURES**

This is a journey-level clerical class used in the Assessor-Recorder's Office. Incumbents perform duties that require general clerical skills, particularly the use of computer hardware and software. As experience is gained, incumbents learn to apply basic laws, policies and procedures that uniquely apply to the Assessor-Recorder's Office. Duties typically emphasize routine customer service, reception, data entry, filing, correspondence, information tracking, document processing and similar functions.

This class can be distinguished from the higher level classes of Assessment Services Office Specialist and Recordable Documents Office Specialist because incumbents in the latter classes regularly perform specialized duties that are more complex and require a broader knowledge base, and/or may serve as lead workers in their assigned work units.

#### **EXAMPLES OF IMPORTANT AND ESSENTIAL DUTIES**

*According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this class, but are not intended to be an inclusive list.*

1. Performs customer service duties that include answering incoming calls and assisting walk-in customers at a reception counter; answers basic questions regarding appraisal and/or recording processes, completion of required forms, and timeframes and deadlines for submitting documents; provides information regarding current account status; performs basic screening and review of submitted documents for accuracy and completeness; refers customers to other staff and/or outside agencies as required.

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### **8107 ASSESSOR-RECORDER OFFICE ASSISTANT**

2. Enters customer information in an established computer database from hand-written, typed or electronic documents; enters data into fields, corrects minor errors and researches/retrieves data and statistics; sets up new accounts and/or records; deletes and/or combines accounts as directed; updates basic customer information such as name and address; enters and/or updates property appraisal information as directed by professional staff.
3. Researches database records to look for and resolve duplications and to gather information for professional staff as requested; provides and/or sends copies of requested documents according to policies and procedures.
4. Maintains logs and workload statistics; compiles data into summary documents.
5. May serve as a lead worker by directing and monitoring the work of a small group of subordinate employees and as a technical resource regarding the more complex work issues in the unit.
6. Types and prepares routine reports, letters, forms and other documents; proofreads and checks typed materials for accuracy, completeness and compliance with well-defined policies and procedures.
7. Receives, opens, stamps and distributes mail; tabulates, records and processes fees received.
8. Processes pre-determined payments and issues receipts.
9. Establishes, maintains and purges files and records according to well defined parameters; may assist with microfilming, micro-imaging, duplicating and reproducing records; maintains tickle files and follows up on matters as needed.
10. Operates personal computers, computer terminals and other standard office equipment; utilizes word processing, spreadsheet and/or database software.
11. Performs other general office administrative duties; attends meetings and trainings; may serve on committees and task forces.
12. Performs other related duties as assigned.

### **JOB RELATED AND ESSENTIAL QUALIFICATIONS**

#### **Knowledge of:**

- o Standard office practices and procedures
- o Basic practices and methods of customer service
- o Business data processing, including the uses of standard, computer hardware and software

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**8107 ASSESSOR-RECORDER OFFICE ASSISTANT**

- o Basic practices of public administration
  
- o Correct English usage including grammar, spelling and punctuation
- o Standard arithmetic including addition, subtraction, multiplication, division, fractions and percentages
- o Record keeping principles and practices

**Ability to:**

- o Perform detailed and accurate office work
- o Provide courteous and effective customer service to a wide variety of people
- o Organize and maintain data, files and records
- o Prioritize work and perform multiple activities
- o Explain and apply policies, procedures, forms and concepts
- o Type letters, forms and other documents
- o Make arithmetic computations
- o Understand and carry out oral and written instructions
- o Establish and maintain effective working relationships with others
- o Operate standard office equipment
- o Use various office automation tools such as word processing, database and spreadsheet applications

**Experience and Training Guidelines:**

**Experience:** Three years of progressively responsible office support experience that required the use of computerized data management systems and extensive contact with the public. At least one year of experience must be in a property tax, real estate or related setting.

**Substitutions:**

- 1) completion of coursework from an accredited college or university may substitute for a maximum of one year of the above-required experience, where 15 semester (or equivalent quarter) units is equivalent to six months of experience; **OR**
- 2) completion of a vocational clerical training program (at least 240 hours) may substitute for six months of the above-required experience.

**Special Requirements:** Depending upon assignment, some positions may require one or more of the following: a valid California driver's license; a valid typing certificate for 40 words per minute; bilingual skills; working on a seasonal basis; and/or working nights, weekends and holidays.

Origination Date:

## CITY AND COUNTY OF SAN FRANCISCO

### 4205 SENIOR ASSESSMENT SERVICES SPECIALIST

#### DEFINITION

Under direction, performs specialized office technical work involving complex appraisal support and assessment support processes within the Assessor-Recorder's Office; reviews real property transaction documents and researches property ownership information to determine tax assessment requirements and make recommendations regarding taxpayer liability; researches unrecorded changes in ownership, multiple-owner property (e.g., timeshares) sales, and new construction permits to determine assessment obligations; assists professional staff by researching information and providing summary reports; explains the more complex and specialized document processing, exemption status process, and related tax matters to taxpayers over the phone, in person, via electronic mail and/or through regular mail; and performs related duties as required.

#### DISTINGUISHING FEATURES

This is a specialized office technical class used in the Assessor-Recorder's Office. Incumbents work under direction to perform support duties pertaining to complex property appraisal and tax assessment-related processes. Duties often require extensive research and communication with external agencies in order to verify information and make property exemption status recommendations and are performed with substantial independence in accordance with legal requirements and departmental policy.

This class may be distinguished from the lower-level class of Assessment Services Office Specialist because incumbents in this class perform technical duties that require advanced knowledge and decision making pertaining to difficult document processing, exemption status, and assessment processes involving real estate transactions, exemptions, standards and related special programs.

#### EXAMPLES OF IMPORTANT AND ESSENTIAL DUTIES

*According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this class, but are not intended to be an inclusive list.*

1. Performs specialized office technical duties pertaining to the review and processing of legal documents relative to property ownership and transactions; reviews and evaluates grant deeds, quitclaim deeds, affidavits of death, court orders, final decrees of distribution, leases, foreclosure sales deeds and other documents; researches a wide variety of legal documents to investigate changes in ownership, transfer of property, boundary discrepancies/overlap or breaks in the chain of title for real property; identifies

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### **4205 SENIOR ASSESSMENT SERVICES OFFICE SPECIALIST**

and establishes eligibility for special tax exemptions; makes recommendations regarding property transfer tax and related assessments, based on State and County laws and codes.

2. Checks and reviews a variety of legal documents for sufficiency and conformance to standards, codes and requirements prior to processing, including the review of legal documents to determine a wide variety of tax exemptions for nonprofits, government agencies and homeowners.
3. Creates preliminary inspection reports; conducts onsite inspections to determine tax exemption status; analyzes, interprets, researches and applies State Board of Equalization's revenue and taxation codes; resolves problems with taxpayers, other City departments and outside government agencies; and calculates and adjusts secured and unsecured roll values.
4. Researches and compiles data as needed for appeals, complaints, unreported changes in ownership, and/or special projects; communicates with taxpayers, attorneys, outside agencies, City/County officials, and others to gather needed information; conducts onsite property visits as necessary.
5. Gathers property and/or business data to determine property tax exemption status; searches deeds of trust to determine real property ownership;; receives and verifies records supporting property statements from public accountants for client firms; researches, gathers and tabulates data to determine appropriate exemption percentage allowable; inspects property based on application information and other data; and prepare inspection reports.
6. May serve as a lead worker by directing and monitoring the work of a small group of subordinate employees and serving as a technical resource regarding the more complex work issues in the unit. May be required to provide training to entry level classifications.
7. Provides factual and procedural information to a variety of customers including attorneys, business owners, the State Board of Equalization, the Assessment Appeals Board, the Tax Collector's Office, and the general public, regarding appraisal and assessment laws, regulations, policies and procedures; assists customers on the phone, via e-mail and regular mail, and in person at the counter; refers customers to other Office staff and/or outside agencies as required.
8. Makes corrections to previous ownership transactions as necessary by researching history records, determining chronologies of events, and identifying errors based on historical laws and requirements.
9. Creates reports, letters, forms and other documents; initiates correspondence and replies in response to inquiries regarding ownership matters; proofreads

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### **4205 SENIOR ASSESSMENT SERVICES OFFICE SPECIALIST**

and checks materials for accuracy, completeness and compliance with policies and procedures.

10. Performs data entry to correct, verify, update, and maintain computerized information; helps maintain a variety of detailed assessment records, including ownership histories and change of ownership reports; logs, updates and tracks information; establishes, maintains and purges files and records according to established procedures.
11. Participates in quality control activities such as reviewing samples of other employees' work to ensure accuracy and consistency; may help train less experienced employees in work unit procedures; may assist in gathering workload data and preparing productivity reports for management.
12. Operates personal computers, computer terminals and other standard office equipment; utilizes word processing, spreadsheet and/or database software.
13. Performs other office administrative duties; attends meetings and trainings; may serve on committees and task forces.
14. Performs other related duties as assigned.

### **JOB RELATED AND ESSENTIAL QUALIFICATIONS**

#### **Knowledge of:**

- o California State Revenue and Taxation codes pertaining to property transactions including direct enrollments, eligible exclusions from reassessment, and assessable transactions
- o Laws, regulations, requirements and administrative procedures that apply to personal property assessment
- o Terminology associated with property appraisal processes and associated legal documents
- o The procedures, methods, instruments and records used to convey, transfer and record title to property
- o Standard office practices and procedures
- o Principles and practices of public administration
- o Principles, practices and methods of customer service
- o Business data processing, including the uses of standard computer hardware and software
- o Correct English usage including grammar, spelling and punctuation
- o Standard arithmetic including addition, subtraction, multiplication, division, fractions and percentages
- o Record keeping principles and practices

#### **Ability to:**

- o Interpret and apply California State Revenue and Taxation Codes in the processing of property ownership transactions



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### **4205 SENIOR ASSESSMENT SERVICES OFFICE SPECIALIST**

- o Research and understand historical changes in the law and their impact on property tax liability
- o Accurately process property transactions using appropriate codes, determining correct percentages for properties with multiple owners, accurately reflecting event dates and valuation dates, and inputting reference notes for complex transactions
- o Read and understand a variety of legal documents, particularly with respect to property ownership transactions
- o Provide information to customers regarding a wide variety of property exemption and assessment issues
- o Evaluate eligibility for various exemption programs
- o Explain specialized policies, procedures, forms and concepts pertaining to property appraisal and related tax assessments
- o Organize facts and information in order to draw logical conclusions and determine work plans and priorities
- o Read and comprehend legal terminology on various forms, letters and other documents
- o Perform detailed and accurate office work
- o Provide courteous and effective customer service to a wide variety of people
- o Organize and maintain data, files and records
- o Prioritize work and perform multiple activities
- o Type letters, forms and other documents
- o Make arithmetic computations
- o Understand and carry out oral and written instructions
- o Establish and maintain effective working relationships with others
- o Operate standard office equipment
- o Use various office automation tools such as word processing, database and spreadsheet applications

#### **Experience and Training Guidelines:**

Two years equivalent to an Assessment Services Office Specialist in the City/County of San Francisco. **OR**

Four years of progressively responsible office support experience, including at least two years that provided familiarity with real and personal property appraisal and tax assessment procedures/documents.

#### **Substitutions:**

1) completion of coursework from an accredited college or university may substitute for a maximum of one year of the above-required, non-specialized experience, where 15 semester (or equivalent quarter) units is equivalent to six months of experience; **OR**

2) completion of a vocational clerical training program (at least 240 hours) may substitute for six months of the above-required experience.

**CITY AND COUNTY OF SAN FRANCISCO**  
**4205 SENIOR ASSESSMENT SERVICES OFFICE SPECIALIST**

**AND**

Special Requirements: Depending upon assignment, some positions may require one or more of the following: a valid California driver's license; a valid typing certificate for 40 words per minute; bilingual skills; working on a seasonal basis; and/or working nights, weekends and holidays.

Origination Date:

## **CITY AND COUNTY OF SAN FRANCISCO**

### **4204 ASSESSMENT SERVICES SPECIALIST**

#### **DEFINITION**

Under general supervision, performs specialized clerical work pertaining to appraisal and assessment support processes within the Assessor-Recorder's Office; makes determinations whether property re-assessments are needed, whether customers are eligible for exemptions, and/or in other routine situations where criteria are pre-established and well-defined; assists appraisers by researching, locating and compiling property information such as deeds, probate records, property history records and other information; maintains property appraisal and tax assessment information in multiple databases; explains property appraisal programs and related tax liabilities to taxpayers over the phone, in person, via electronic mail and/or through regular mail; makes tax roll adjustments and account changes as authorized; may serve as a lead worker by directing and monitoring the work of a small group of subordinate clerical staff; and performs related duties as required.

#### **DISTINGUISHING FEATURES**

This is a specialized clerical class used in the Assessor-Recorder's Office. Incumbents work under general supervision to perform a wide variety of specialized support duties pertaining to property appraisal and tax assessment-related documents and processes. Primary duties emphasize specialized customer service, program eligibility, research, report development/maintenance, information tracking, document processing and similar functions. Alternatively or concurrently, incumbents may serve as lead workers with responsibility for directing and monitoring the work of subordinates on an ongoing and regular basis. Duties are performed with substantial independence in accordance with well-defined procedures.

This class may be distinguished from the lower-level class of Assessor-Recorder Assistant because incumbents in this class perform more complex and specialized clerical duties that require familiarity with legal documents as well as the functions, policies and procedures of a county Assessor's office.

This class may be distinguished from the higher-level class of Assessment Support Technician because incumbents in the latter class perform technical duties that require advanced knowledge and decision making pertaining to difficult appraisal and assessment processes involving the more complex real estate transactions, exemptions, standards and related special programs.

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**EXAMPLES OF IMPORTANT AND ESSENTIAL DUTIES**

*According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this class, but are not intended to be an inclusive list.*

1. Performs a wide range of specialized customer service duties in the Assessor-Recorder's Office; provides factual and procedural information to a variety of customers including attorneys, business owners, the State Board of Equalization, the Assessment Appeals Board, the Tax Collector's Office, and the general public, regarding appraisal and assessment laws, regulations, policies and procedures; assists customers on the phone, via e-mail and regular mail, and in person at the counter; refers customers to other Office staff and/or outside agencies as required.
2. Explains homeowner's exemption program eligibility requirements; evaluates program applications and determines eligibility based on well-defined, pre-established criteria; responds to and researches complaints regarding determinations; works with other divisions and the Tax Collector's Office to ensure that exemption accounts are adjusted appropriately.
3. May determine routine personal property assessments based on pre-established and well-defined criteria, subject to review by professional staff.
4. Assists managers and/or professional appraisers by researching client account and/or property information such as property deeds, transfers, probate, ownership, and other matters; compiles, organizes, tabulates, summarizes and distributes documents and information; creates reports, letters, forms and other documents, proofreading and checking materials for accuracy, completeness and compliance with policies and procedures.
5. May serve as a lead worker by directing and monitoring the work of a small group of subordinate employees and as a technical resource regarding the more complex work issues in the unit.
6. Receives, opens, stamps and responds to mail; processes and responds to requests for deeds, liens, parcel maps, marriage licenses, judgments, and other documents; makes and provides copies based on customer requests and in accordance with policies and procedures; determines fees for providing certified and non-certified copies of documents; receives payments and issues receipts.
7. Performs data entry to correct, verify, update, and maintain computerized information; logs, updates and tracks information; calculates and reconciles cash receipts; establishes, maintains and purges files and records according to established procedures.

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8. Operates personal computers, computer terminals and other standard office equipment; utilizes word processing, spreadsheet and/or database software.
9. Performs other general office administrative duties; attends meetings and trainings; may serve on committees and task forces.
10. Performs other related duties as assigned.

### **JOB RELATED AND ESSENTIAL QUALIFICATIONS**

#### **Knowledge of:**

- o Basic laws, regulations, requirements and administrative procedures that apply to personal property assessment
- o Basic terminology associated with property appraisal processes and associated legal documents
- o Basic procedures, methods, instruments and records used to convey, transfer and record title to property
- o Standard office practices and procedures
- o Principles and practices pertaining to public administration
- o Principles, practices and methods of customer service
- o Business data processing, including the uses of standard computer hardware and software
- o Basic principles of lead supervision, including how to motivate employees
- o Correct English usage including grammar, spelling and punctuation
- o Standard arithmetic including addition, subtraction, multiplication, division, fractions and percentages Record keeping principles and practices

#### **Ability to:**

- o Provide information to customers regarding a wide variety of property appraisal and assessment issues
- o Evaluate customer eligibility for various exemption programs
- o Read and comprehend legal terminology on various forms, letters and other documents
- o Explain and apply specialized policies, procedures, forms and concepts pertaining to property appraisal and related tax assessments
- o Lead the work of employees engaged in routine clerical activities
- o Perform detailed and accurate office work
- o Provide courteous and effective customer service to a wide variety of people
- o Organize and maintain data, files and records
- o Prioritize work and perform multiple activities
- o Type letters, forms and other documents
- o Make arithmetic computations
- o Understand and carry out oral and written instructions
- o Establish and maintain effective working relationships with others
- o Operate standard office equipment

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- o Use various office automation tools such as word processing, database and spreadsheet applications

**Experience and Training Guidelines:**

One year experience equivalent to an Assessor-Recorder Office Assistant in the City/County of San Francisco. **OR**

Three years of progressively responsible office support experience, including at least one year that provided familiarity with real and personal property appraisal and tax assessment procedures/documents.

**Substitutions:**

1) completion of coursework from an accredited college or university may substitute for a maximum of one year of the above-required, non-specialized experience, where 15 semester (or equivalent quarter) units is equivalent to six months of experience; **OR**

2) completion of a vocational clerical training program (at least 240 hours) may substitute for six months of the above-required experience.

**AND**

Special Requirements: Depending upon assignment, some positions may require one or more of the following: a valid California driver's license; a valid typing certificate for 40 words per minute; bilingual skills; working on a seasonal basis; and/or working nights, weekends and holidays.

Origination Date: