

**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:** 39  
**Fiscal Year:** 2010/2011  
**Posted Date:** February 23, 2011  
**Reposted Date:** April 29, 2011

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

<b>Item #</b>	<b>Dept</b>	<b>Class/Title</b>
1	ASR	4213 Assessor-Recorder Office Assistant

<b>Item #</b>	<b>Dept</b>	<b>Class/Title</b>
2	ASR	4214 Assessor-Recorder Office Specialist

<b>Item #</b>	<b>Dept</b>	<b>Class/Title</b>
3	ASR	4215 Assessor-Recorder Senior Office Specialist

**For additional information regarding the above proposed action, please contact Christina Penland at (415) 557-4848 or-email her at [Chrisina.Penland@sfgov.org](mailto:Chrisina.Penland@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  
Christina Fong, DHR  
Carmela Villasica, DHR  
Linda Cosico, DHR  
RAS Team Leader(s)  
DHR Support Services  
Martin Gran, DHR  
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Maria Newport, SFERS  
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File

**CITY AND COUNTY OF SAN FRANCISCO  
DEPARTMENT OF HUMAN RESOURCES**

**Title: Assessor-Recorder Office Assistant  
Job Code: 4213**

**INTRODUCTION**

Under immediate supervision, performs routine but specialized office support and customer service work within the Assessor-Recorder's Office; provides primary counter reception and initial document receipt/processing; provides information to the public regarding the recording, archiving, and retrieving of legal documents; assists appraisal staff with researching, gathering and compiling routine assessment-related information; and performs related duties as required.

**DISTINGUISHING FEATURES**

This is the entry-level class of the Assessor-Recorder support series. Incumbents initially work under immediate supervision to perform routine office support duties while learning the specialized office policies and procedures that are unique to the Assessor-Recorder's Office. Duties emphasize routine activities pertaining to appraisal services, document processing and various support services. As experience is gained, incumbents learn to perform duties with greater independence within established guidelines.

This class may be distinguished from the higher-level class of 4214 Assessor-Recorder Office Specialist because that is the journey-level class where incumbents perform the full range of journey level office support duties typically assigned to the class.

**SUPERVISION EXERCISED:** None

**MAJOR, 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 job code/class and are not intended to be an inclusive list.*

1. Performs a limited range of routine but specialized office support and customer service duties in the Assessor-Recorder's Office; learns to receive, files and processes deeds, reconveyances, releases of liens, judgments, marriage certificates and various legal and other documents; performs basic screening and review of documents for accuracy and completeness; refers customers to other Office staff and/or outside agencies as required.
2. Learns to provide factual and procedural information regarding assessment and recording laws, regulations, policies and procedures in person, by mail or over the phone to a wide range of individuals including attorneys, government agencies and the public; provides basic instructions to customers regarding the use of specialized equipment to search for records and documents.
3. Assists professional appraisal staff by compiling, organizing and distributing assessment and/or appraisal-related documents and information; tabulates data and information; maintains statistical reports.
4. Operates personal computers, computer terminals and other equipment to research

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databases, documents and records and locate requested information; provides and/or sends copies of requested documents according to Office policies and procedures.

5. Computes and receives payments for routine service fees; issues receipts.
6. Performs routine data entry to correct, verify, update, and maintain databases, including the tax assessment roll; enters data into fields, corrects minor errors and researches/retrieves data and statistics.
7. Types and prepares various items such as letters and forms; proofreads and checks typed materials for accuracy, completeness and compliance with well-defined policies and procedures.
8. Receives, opens, stamps and distributes mail; tabulates, records and processes fees received.
9. Researches, retrieves, updates and tracks information in automated systems; checks for duplicate accounts and other data errors.
10. 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.
11. Performs other general office administrative duties; attends meetings and trainings; may serve on committees and task forces.

**IMPORTANT AND ESSENTIAL KNOWLEDGES, SKILLS, AND ABILITIES**

**Knowledge of:**

- o Standard office practices and procedures
- o Basic laws, principles and practices pertaining to public administration
- o Basic practices and methods of customer service
- o Business data processing principles and practices, including the uses of computer equipment
- o Correct English usage including grammar, spelling and punctuation
- o Basic arithmetic
- 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

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- o Operate standard office equipment
- o Use various office automation tools such as word processing and spreadsheet applications

**MINIMUM QUALIFICATIONS**

*These minimum qualifications are to be used as a guide for establishing the education, training, experience, special skills and/or license(s) which are required for employment in the classification. Please note, additional qualifications (i.e., special conditions) may apply to a particular position and will be stated on the exam/job announcement.*

Experience: Three years of progressively responsible office support experience that required the use of data management systems researching documents, and extensive contact with the public. At least one year of the experience should have been at a level comparable to the class of **Clerk** in the City/County of San Francisco.

Substitutions: 1) completion of coursework from an accredited college or university may substitute for the above-required experience on a year-for-year basis, where 30 semester (or equivalent quarter) units is equivalent to one year; **OR** 2) completion of a clerical training program (at least 240 hours) may substitute for six months of the above-required experience.

**LICENSE AND CERTIFICATION**

**PROMOTIVE LINES**

**TO: 4214 ASSESSOR-RECORDER OFFICE SPECIALIST**

**ORIGINATION DATE:**

**AMENDED DATE:**

**REASON FOR AMENDMENT**

*To accurately reflect the current tasks, knowledge, skills and abilities defined in the most recent job analysis conducted for this job code.*

**BUSINESS UNIT(S):**

COMMN

**CITY AND COUNTY OF SAN FRANCISCO  
DEPARTMENT OF HUMAN RESOURCES**

**Title: Assessor-Recorder Office Specialist  
Job Code: 4214**

**INTRODUCTION**

Under general supervision, performs varied and specialized office support and customer service work within the Assessor-Recorder's Office; provides primary counter reception and initial document receipt/processing; provides information to the public regarding the recording, archiving, and retrieving of legal documents; whether customers are eligible for exemptions, and/or in other routine situations where criteria are pre-established and well-defined; reviews and processes basic real property transactions; 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, exemption status process, and related tax matters to taxpayers over the phone, in person, via electronic mail and/or through regular mail; assists appraisal staff with researching, gathering and compiling assessment-related information; and performs related duties as required.

**DISTINGUISHING FEATURES**

This is the full working/journey-level class of the Assessor-Recorder support series. Incumbents work under general supervision to perform a wide range of complex office support duties, including many that are unique to the Assessor-Recorder's Office. Duties emphasize journey-level activities pertaining to appraisal services, document processing and various support services. Incumbents perform assigned duties with substantial independence within established guidelines.

This class may be distinguished from the lower-level class of 4213 Assessor-Recorder Office Assistant because that is the entry-level class where incumbents initially perform the more routine office support tasks and learn to perform journey level duties as they gain the required knowledge and experience.

**SUPERVISION EXERCISED:** May serve as a lead worker to direct, monitor and provide training to a small group of subordinate employees.

**MAJOR, 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 job code/class and are not intended to be an inclusive list.*

1. Performs a wide range of specialized office support and customer service duties in the Assessor-Recorder's Office; receives, files and processes deeds, reconveyances, releases of liens, judgments, marriage certificates and various legal and other documents; performs basic screening and review of documents for accuracy, completeness and general appropriateness for recording; refers customers to other Office staff and/or outside agencies as required.
2. Provides factual and procedural information regarding assessment and recording laws,

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regulations, policies and procedures in person, by mail or over the phone to a wide range of individuals including attorneys, government agencies and the public; provides instructions to customers regarding the use of specialized equipment to search for records and documents.

3. Explains **homeowner** exemption programs' 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.
4. Assists professional appraisal staff by compiling, organizing and distributing assessment and/or appraisal-related documents and information; researches, tabulates and evaluates data and information; may assist with personal property appraisals by using well-defined resources and tools to establish value based on objective criteria; maintains statistical reports.
5. ~~Gathers property and/or business data to determine property tax exemption status; gathers and tabulates data to determine appropriate exemption percentage allowable; inspects property based on application information and other data; and prepare inspection reports.~~ **Performs basic tax assessment activities by reviewing and evaluating basic real property transactions; researches property rolls to verify changes in ownership and transfer of property.**
6. Operates personal computers, computer terminals and other equipment to research databases, documents and records and locate requested information; provides and/or sends copies of requested documents according to Office policies and procedures.
7. 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.
8. Performs complex data entry to correct, verify, update, and maintain databases, including the tax assessment roll; enters data into fields, corrects errors and researches/retrieves data and statistics.
9. 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.
10. Types and prepares various items such as letters and forms; proofreads and checks typed materials for accuracy, completeness and compliance with well-defined policies and procedures.
11. Receives, opens, stamps and distributes mail; tabulates, records and processes fees

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**Job Code: 4214**

received.

12. Researches, retrieves, updates and tracks information in automated systems; checks for duplicate accounts and other data errors.
13. 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.
14. Performs other general office administrative duties; attends meetings and trainings; may serve on committees and task forces.

**IMPORTANT AND ESSENTIAL KNOWLEDGES, SKILLS, AND ABILITIES**

**Knowledge of:**

- o Standard policies, procedures, terminology and practices used in a county assessment and recording office
- o Laws, regulations and requirements that apply to county assessment and recording administrative procedures
- o Standard office practices and procedures
- o Basic laws, principles and practices pertaining to public administration
- o Principles, practices and methods of customer service
- o Business data processing principles and practices, including the uses of computer equipment
- o Correct English usage including grammar, spelling and punctuation
- o Basic arithmetic
- o Record keeping principles and practices

**Ability to:**

- o Perform a wide range of office support duties pertaining to county assessment and recording activities
- o Perform detailed and accurate office work
- o Evaluate customer eligibility for various exemption programs
- o **Accurately process property transactions**
- 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 and spreadsheet applications

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**Job Code: 4214**

**MINIMUM QUALIFICATIONS**

*These minimum qualifications are to be used as a guide for establishing the education, training, experience, special skills and/or license(s) which are required for employment in the classification. Please note, additional qualifications (i.e., special conditions) may apply to a particular position and will be stated on the exam/job announcement.*

Pattern I

Experience: One year equivalent to a **4213 Assessor-Recorder Office Assistant** in the City/County of San Francisco.

OR

Pattern II

Experience: Three years of progressively responsible office support experience **in a property tax assessment office** that required the use of data management systems, **researching documents**, and extensive contact with the public including at least one year of experience at a level comparable to the class of **4213~~4~~ Assessor-Recorder Office Assistant** in the City/County of San Francisco.

Substitutions: 1) completion of coursework from an accredited college or university may substitute for the above-required general (not assessment/recording-related) office support experience on a year-for-year basis to a maximum of two years, where 30 semester (or equivalent quarter) units is equivalent to one year; OR 2) completion of a clerical training program (at least 240 hours) may substitute for six months of the above-required general (not assessment/recording-related) experience.

**LICENSE AND CERTIFICATION**

**PROMOTIVE LINES**

FROM: 4213 ASSESSOR-RECORDER OFFICE ASSISTANT

TO: 4215 ASSESSOR-RECORDER SENIOR OFFICE SPECIALIST

**ORIGINATION DATE:**

**AMENDED DATE:**

**REASON FOR AMENDMENT**

*To accurately reflect the current tasks, knowledge, skills and abilities defined in the most recent job analysis conducted for this job code.*

**BUSINESS UNIT(S):**

COMMN



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**Title: Assessor-Recorder Senior Office Specialist  
Job Code: 4215**

**INTRODUCTION**

Under direction, performs difficult, specialized and technical office support and customer service work within the Assessor-Recorder's Office; receives, examines, and records documents; provides complex technical information to the public regarding the recording, archiving, and retrieving of legal documents; assists appraisal staff with researching, gathering and compiling assessment-related information, including structural classification and property identification data for tax appraisal purposes; may serve as a lead worker by scheduling, assigning, directing and monitoring the work of subordinate staff on a regular basis; and performs related duties as required.

**DISTINGUISHING FEATURES**

This is the senior-level class of the Assessor-Recorder support series. Incumbents work under direction to perform the most difficult and specialized clerical and technical duties that require advanced knowledge of technical administrative policies and procedures, most of which are unique to the Assessor-Recorder's Office. Duties emphasize advanced and technical level activities pertaining to document examining, property ownership and transactions, change in ownership assessment determination recommendations, transfer tax assessment, **complex exemptions**, and real/personal property appraisal services. Incumbents perform assigned duties with substantial independence, applying advanced knowledge of technical assessment and recording requirements, policies and procedures to make decisions and perform assignments.

This class may be distinguished from the lower-level class of 4214 Assessor-Recorder Office Specialist because that is the class where incumbents perform journey-level, less complex duties. This class also may be distinguished from the Appraiser job series because 4215 incumbents do not perform valuation duties, nor are they required to hold a State Board of Equalization certification.

**SUPERVISION EXERCISED:** May serve as a lead worker to direct, monitor and provide training to a small group of subordinate employees.

**MAJOR, 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 job code/class and are not intended to be an inclusive list.*

1. Performs highly specialized technical work and analysis requiring in-depth knowledge and a high level of independence involving review and processing of real property transactions and/or complex document recording processes within the Assessor-Recorder's Office; receives, examines, evaluates, and records deeds, reconveyances, releases of liens, judgments, marriage certificates and various legal and other documents; interprets various codes, statutes and ordinance in examining and recording a wide variety of complex 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.

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Job Code: 4215**

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 real-time, in accordance with the Revenue and Taxation Code and State and local tax laws and ordinances.
3. Searches deeds ~~of trust~~ to determine real property ownership; receives and verifies records supporting property statements;
4. Receives and collects payments for a wide range of complex service fees based on Revenue and Taxation codes as well as state and local tax laws and ordinances; issues receipts and accounts for money received by balancing records. May receive and collect payments of recordable documents; balance cash receipts and receivables; prepare balance sheets and processing forms; and post receivables and credit appropriate accounts.
5. Provides complex technical information in person, on the phone, and via email and regular mail regarding policies and procedures pertaining to recording requirements, assessment and recording laws, regulations, policies and procedures to attorneys, government agencies and the public.
6. Performs technical tax assessment activities by reviewing and evaluating real property transactions such as grant deeds, quitclaim deeds, affidavits of death, court orders, final decrees of distribution, leases, foreclosure sales deeds and other documents; researches property rolls to verify changes in ownership, transfer of property, boundary discrepancies and overlap or breaks in the chain of title for real property; makes recommendations regarding property transfer tax and other assessments, based on State and County laws and codes.
7. Provides technical assistance to professional appraisers pertaining to real property appraisals; collects structural classification data in the field or in the office for residential dwellings, apartment complexes, commercial concerns and industrial firms; notes construction characteristics related to foundation, exterior, interior, plumbing, lighting and heating; determines shape classifications using perimeter and square footage calculations; takes photographs of structures.
8. Gathers property and/or business data to determine welfare tax exemption status; gathers and tabulates data to determine appropriate exemption percentage allowable; inspects property based on application information and other data; and prepares inspection reports; explains exemption programs' 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.
9. Researches and compiles property value data; identifies comparable sales; searches deeds ~~of trust~~ to determine delivered prices; provides technical support for cost analyses and/or income analyses for both real and business/personal property; receives and verifies records supporting

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property statements from public accountants for client firms; researches, gathers and tabulates data from financial and operating statements.

10. Explains appraisal procedures and policies to builders, contractors, real estate brokers and the general public; serves as a technical liaison to various agents regarding appraisal processes.
11. Maintains and updates statistical data; prepares and maintains complex statistical reports.
12. 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.
13. Operates personal computers, computer terminals and other equipment to research databases, documents and records and locate requested information; provides and/or sends copies of requested documents according to Office policies and procedures.
14. Types and prepares a wide variety of correspondence, forms and complex documents; independently initiates correspondence pertaining to areas of assignment.
15. Performs other technical administrative duties; attends meetings and trainings; may serve on committees and task forces.

**IMPORTANT AND ESSENTIAL KNOWLEDGES, SKILLS, AND ABILITIES**

**Knowledge of:**

- o Advanced policies, procedures, terminology and practices pertaining to technical county assessment and recording practices
- o Laws, regulations and requirements that apply to county assessment and recording administrative procedures
- o The tax roll process, including the relationship between the Assessor-Recorder, Controller and Tax Collector's offices
- o Advanced office practices and procedures, including methods of researching, gathering, tabulating and reporting technical data
- o Basic laws, principles and practices pertaining to public administration
- o Principles, practices and methods of customer service
- o Business data processing principles and practices, including the uses of computer equipment
- o Correct English usage including grammar, spelling and punctuation
- o Basic arithmetic
- o Advanced record keeping principles and practices

**Ability to:**

- o Perform a wide range of technical duties pertaining to county assessment and recording activities
- o Review, evaluate, record and interpret complex information
- o **Evaluate customer eligibility for welfare exemption programs**
- o Accurately process property transactions using appropriate codes, determining correct

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**Title: Assessor-Recorder Senior Office Specialist  
Job Code: 4215**

- percentages for properties with multiple owners, accurately reflecting event dates and valuation dates, and inputting reference notes for complex transactions
- o Research a variety of sources to gather data pertaining to historic, reproduction and replacement costs for property whose value could be impacted by the results of such research
  - o Interpret, apply, and explain complex policies, procedures, forms and concepts
  - 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 and spreadsheet applications

**MINIMUM QUALIFICATIONS**

*These minimum qualifications are to be used as a guide for establishing the education, training, experience, special skills and/or license(s) which are required for employment in the classification. Please note, additional qualifications (i.e., special conditions) may apply to a particular position and will be stated on the exam/job announcement.*

Pattern I

Experience: Two years equivalent to or higher than a **4214 Assessor-Recorder Office Specialist** in the City/County of San Francisco.

OR

Pattern II

Education: Completion of 60 semester (or equivalent quarter) units from an accredited college or university, with major coursework in business administration, accounting or a closely-related field.

Experience: Three years of progressively responsible legal document technical review, **researching documents**, and processing experience, preferably in a legal environment or county Assessor or Recorder's office, including two years performing journey-level duties comparable to or higher than those assigned to the class of **4214 Assessor-Recorder Office Specialist** in the City/County of San Francisco.

Substitution:

- 1) Additional specialized assessment/recording-related experience can be substituted for the

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above-required education on a year-for-year basis, where one year of experience is equivalent to 30 semester (or equivalent quarter) units, OR.

2) 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.

**LICENSE AND CERTIFICATION**

**PROMOTIVE LINES**

FROM: 4214 ASSESSOR-RECORDER OFFICE SPECIALIST

**ORIGINATION DATE:**

**AMENDED DATE:**

**REASON FOR AMENDMENT**

*To accurately reflect the current tasks, knowledge, skills and abilities defined in the most recent job analysis conducted for this job code.*

**BUSINESS UNIT(S):**

COMMN