

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

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

Posting No: 05
Fiscal Year: 2020/2021
Posted Date: 09/03/2020
Reposted Date: N/A

AMEND THE FOLLOWING JOB SPECIFICATION(S):
(Job specification(s) attached)

Item #	Job Code	Title
1	4213	Assessor-Recorder Office Assistant
2	4215	Assessor-Recorder Senior Office Specialist

Protests on an item should be addressed to the Human Resources Director and can be submitted by mail to the City and County of San Francisco, Department of Human Resources, 1 South Van Ness Ave, 4th Floor, San Francisco, CA 94103 or by email to DHR.ClassificationActionPostings@sfgov.org. All protests must be received in writing no later than close of business seven (7) calendar days from the posting date, and must include the posting and item number(s), the basis on which the protest is submitted and identify the affected parties.

Copies of this notice may be obtained from the Department of Human Resources or from the website at: <http://sfdhr.org/index.aspx?page=109>. Copies of Civil Service Rule 109 may be obtained from the Department of Human Resources, the office of the Civil Service Commission at 25 Van Ness Ave, Suite 720, San Francisco, CA 94102 or from the website at: [Rule 109 Position Classification and Related Rules | Civil Service Commission](#).

cc: All Employee Organizations
All Departmental Personnel Officers
DHR – Class and Comp Unit
DHR – Client Services Unit
DHR – Employee Relations Unit
DHR – Recruitment and Assessment Unit
DHR – Client Services Operations
Micki Callahan, DHR
Sandra Eng, CSC
Sue Hwang, SFERS
Theresa Kao, Controller/ Budget Division
E-File

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

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

DEFINITION

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

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 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 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.

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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.

KNOWLEDGE, SKILLS, AND ABILITIES

Knowledge of: Standard office practices and procedures; basic laws, principles and practices pertaining to public administration; basic practices and methods of customer service; business data processing principles and practices, including the uses of computer equipment; correct English usage including grammar, spelling and punctuation; basic arithmetic; record keeping principles and practices

Ability or Skill to: Perform detailed and accurate office work; provide courteous and effective customer service to a wide variety of people; organize and maintain data, files and records; prioritize work and perform multiple activities; explain and apply policies, procedures, forms and concepts; type letters, forms and other documents; make arithmetic computations; understand and carry out oral and written instructions; establish and maintain effective working relationships with others; operate standard office equipment; use various office automation tools such as word processing and spreadsheet applications

MINIMUM QUALIFICATIONS

These minimum qualifications establish 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.

Education:

Experience:

Three ~~Two~~ **(2)** 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 **(1)** year of the experience should have been at a level comparable to the

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class of Clerk in the City/County of San Francisco.

License and Certification:

None

Substitution:

1) Completion of coursework from an accredited college or university may substitute for the above-required experience on a year-for-year basis, where thirty (30) semester (or equivalent forty-five (45) quarter) units is equivalent to one (1) year; OR 2) Completion of a clerical training program (at least two-hundred forty (240) hours) may substitute for six (6) months of the above-required experience.

SUPPLEMENTAL INFORMATION

PROMOTIVE LINES

To: 4214 Assessor-Recorder Office Specialist

ORIGINATION DATE: 05/10/11

AMENDED DATE: 09/xx/20

REASON FOR AMENDMENT: *To accurately reflect the current tasks, knowledge, skills & abilities, and minimum qualifications.*

BUSINESS UNIT(S): COMMN

**CITY AND COUNTY OF SAN FRANCISCO
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**Title: Assessor-Recorder Senior Office Specialist
Job Code: 4215**

DEFINITION

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.

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 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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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 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 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 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.

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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.

KNOWLEDGE, SKILLS, AND ABILITIES

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

Ability or Skill to: Perform a wide range of technical duties pertaining to county assessment and recording activities Review, evaluate, record and interpret complex information Evaluate customer eligibility for welfare exemption programs 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 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 Interpret, apply, and explain complex policies, procedures, forms and concepts Perform detailed and accurate office work Provide courteous and effective customer service to a wide variety of people Organize and maintain data, files and records Prioritize work and perform multiple activities Type letters, forms and other documents Make arithmetic computations Understand and carry out oral and written instructions Establish and maintain effective working relationships with others Operate standard office equipment Use various office automation tools such as word processing and spreadsheet applications

MINIMUM QUALIFICATIONS *These minimum qualifications establish 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.*

Education:

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Experience:

Pattern I Experience: Three (3) years equivalent to or higher than a 4213 Assessor-Recorder Office Assistant in the City/County of San Francisco.

OR

Pattern II Experience: Two (2) years equivalent to or higher than a 4214 Assessor-Recorder Office Specialist in the City/County of San Francisco.

OR

Pattern III Education: Completion of sixty (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 (3) 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 (2) 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.

License and Certification:

None

Substitution:

1) Additional specialized assessment/recording-related experience ~~may can be~~ substituted for the above-required education on a year-for-year basis, where one year of experience is equivalent to thirty (30) semester (or equivalent forty-five (45) 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 Pattern III of the Minimum Qualifications Experience and Training Guidelines.

SUPPLEMENTAL INFORMATION

PROMOTIVE LINES

From: 4214 Assessor-Recorder Office Specialist

ORIGINATION DATE: 05/10/11

AMENDED DATE: 09/xx/20

REASON FOR AMENDMENT: *To accurately reflect the current tasks, knowledge, skills & abilities, and minimum qualifications.*

BUSINESS UNIT(S): COMMN