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DUTY STATEMENT

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|  | | CURRENT |
|  | PROPOSED |

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| SCHEDULE TO BE WORKED/WORKING HOURS  **Monday - Friday** | | | EFFECTIVE DATE | |
| CIVIL SERVICE CLASSIFICATION  **Associate Property Auditor Appraiser** | | | WORKING TITLE  **Associate Property Auditor Appraiser** | |
| DEPARTMENT/DIVISION/DISTRICT/UNIT  **County-Assessed Properties Div./Welfare Exemption Section** | | | SPECIFIC LOCATION ASSIGNED TO  **Sacramento, CA** | |
| SEERA DESIGNATION  **Rank and File** | | BARGAINING UNIT  **01** | WORK WEEK GROUP  **2** | CERTIFICATES REQUIRED  **Property Tax Appraiser** |
| FINGERPRINTS/BACKGROUND CHECK REQUIRED  Yes No | | BILINGUAL POSITION  Yes  No | SUPERVISION EXERCISED  **None** | |
| INCUMBENT | | | POSITION NUMBER *(Agency-Unit-Class-Serial)*  **290-302-5448-024** | |
| *The mission of the State Board of Equalization is to serve the public through fair, effective and efficient tax administration.* | | | | |
| POSITION’S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS  Under the direct supervision of the Supervising Property Appraiser and under guidance of the senior property appraiser, the Associate Property Auditor Appraiser (APAA) serves as a member of Welfare Exemption Section performing a wide variety of analytical and administrative functions as part of co-administering the welfare exemption and veterans' organization exemption. The APAA researches, reviews, and analyzes various documents to make the initial determination of an organization's eligibility prior to issuing an Organizational Clearance Certificate (OCC) or Supplemental Clearance Certificate (SCC). The incumbent focuses on processing OCC and SCC claim filings of the more difficult claims, conducts compliance audits (assessment practices surveys) of the County Assessors' offices and provides guidance to taxpayers, County Assessors' and claimants regarding the laws pertaining to the welfare exemption. Travel may be required throughout the state up to 50 percent of the time by automobile and airplane. | | | | |
| **Candidate must be able to perform the following essential job functions with or without reasonable accommodation.** | | | | |
| **PERCENTAGE**  **OF TIME SPENT** | **DUTIES** | | | |
|  | **ESSENTIAL JOB FUNCTIONS** | | | |
| 65% | Reviews and analyzes the moderate to complex OCC and SCC claim filings to make an initial determination of an organization's eligibility. This includes, but is not limited to, reviewing and analyzing an organization's formative documents, tax-exempt status letter, financial statements, and information regarding an organization's activities. Performs compliance audits of the moderate to complex organizations that hold an OCC/SCC. Researches and gathers information from the internet and various state agencies and reviews and analyzes financials of organizations to determine appropriate action on claims. Assists the senior property appraisers in processing the more complex claim filings. Drafts written responses to property tax inquiries for review by the senior property appraisers or the supervisor. | | | |
| 25% | Researches, reviews, and analyzes legislation, court decisions, legal opinions, publications, and agency resources; and consults with knowledgeable parties on property tax issues. Provides verbal and written guidance to County Assessors' staff, taxpayers, exemption claimants, and other public agencies regarding property tax exemption laws and procedures. Assists claimants with understanding the welfare and veterans' organization exemptions and the statutory requirements to obtain an OCC and/or SCC. Assists and provides input in the revision and/or creation of desk procedures, Assessors' Handbook Sections, publications, and prescribed forms used by County Assessors as part of co-administering the Welfare Exemption Program.  Assists in performing compliance audits (assessment practices surveys) to determine whether County Assessors' assessment practices and procedures comply with the statutes and regulations governing the Welfare Exemption Program. | | | |
| 5% | Participates in conferences and meetings with management, other staff members, claimants, County Assessors, and/or interested parties to discuss property taxation issues involving welfare and veterans' organization exemptions. Assists with and/or conducts presentations about the welfare and veterans' organizations exemptions. | | | |
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|  | **MARGINAL JOB FUNCTIONS** | | | |
| 5% | As necessary, performs other duties based upon operational needs. | | | |
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| **WORK ENVIRONMENT OR PHYSICAL ABILITIES REQUIRED FOR THE JOB** *(if applicable)***:** | | | | |
| Work Environment: | | | | |
| * Primarily in the office; however, audits will be conducted at various County Assessors' offices or properties throughout the State of California. | | | | |
| Physical Abilities: | | | | |
| * Sit for extended periods of time. * Audit work requires the ability to inspect interior and exterior of properties. * Transport up to 40 pounds of records and business equipment to various work sites. | | | | |
| Additional Requirements/Expectations: | | | | |
| * Possess a valid California driver's license. * Utilize database, internet, and Microsoft Office Suite. * Travel may be required throughout the state up to 50 percent of the time by automobile and airplane. | | | | |
| *I have read this duty statement and fully understand that I must perform the Essential Job Functions of my position with or without reasonable accommodation.* | | | | |
| |  |  |  |  |  | | --- | --- | --- | --- | --- | | PRINT EMPLOYEE NAME | EMPLOYEE’S SIGNATURE | | DATE | | | ***I certify that the above accurately represents the duties of the position and that I have reviewed these duties with the above named employee.*** | | | | | | PRINT SUPERVISOR NAME | | SUPERVISOR’S SIGNATURE | | DATE | | | | | |
| |  |  | | --- | --- | | HRD Approval Date: 10/12/2020 | C&P Analyst Initials: JPL | | | | | |
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