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DUTY STATEMENT

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|  | | CURRENT |
|  | PROPOSED |

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| SCHEDULE TO BE WORKED/WORKING HOURS  **Monday through Friday** | | | EFFECTIVE DATE | |
| CIVIL SERVICE CLASSIFICATION  **Assistant Property Appraiser** | | | WORKING TITLE  **Assistant Property Appraiser** | |
| DEPARTMENT/DIVISION/DISTRICT/UNIT  **Taxpayers' Rights Advocate Office** | | | SPECIFIC LOCATION ASSIGNED TO  **Sacramento** | |
| SEERA DESIGNATION  **Rank and File** | | BARGAINING UNIT  **01** | WORK WEEK GROUP  **2** | CERTIFICATES REQUIRED  **None** |
| FINGERPRINTS/BACKGROUND CHECK REQUIRED  Yes No | | BILINGUAL POSITION  Yes  No | SUPERVISION EXERCISED  **None** | |
| INCUMBENT | | | POSITION NUMBER *(Agency-Unit-Class-Serial)*  **290-305-5439-003** | |
| *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 close supervision of the Taxpayers' Rights Advocate (Career Executive Assignment position), and lead of a Senior Specialist Property Appraiser, the Assistant Property Appraiser performs activities related to investigation and analysis of taxpayer complaints and problems in the area of property taxes, facilitating resolution of such complaints or problems. Evaluates issues raised by taxpayers for trends and recurring issues. | | | | |
| **Candidate must be able to perform the following essential job functions with or without reasonable accommodation.** | | | | |
| **PERCENTAGE**  **OF TIME SPENT** | **DUTIES** | | | |
|  | **ESSENTIAL JOB FUNCTIONS** | | | |
| 55% | Investigation of Taxpayer Problems:  Investigates and facilitates resolution of taxpayer complaints and problems involving a wide variety of property tax assessment and collection issues. Investigation may be from a taxpayer's direct contact with the Advocate's office or referred by Board Members, the State Controller, or legislators' offices. Analyzes sensitive taxpayer problems or concerns which may involve local government officials (assessors and tax collectors) and their staff. Provides the analysis to the Advocate and senior lead for discussion. Assists the Advocate to ensure taxpayers are treated fairly according to property tax law.  Works on less difficult and less complex cases that involve property tax law, regulations and guidance that are unique to specific areas. Cases involve various aspects of property appraisal, exclusion or exemption issues, and property tax bills. Communicates with taxpayers to understand the nature of their problem. Conducts research on the law, rules, and guidance pertinent to the taxpayer's problem. Contacts local county assessor's offices to obtain information about the taxpayer's property and its assessment. Assists in researching and analyzing property tax issues to provide draft written communications to taxpayers or county assessors.  Assists other appraisers with gathering and analyzing data from complaints and problems to identify recurring areas of conflict or misunderstanding between taxpayers and the government agencies assessing their property. | | | |
| 25% | Assistance to Taxpayers and Management:  Provides property tax information to taxpayers on the less complex assessment issues. Provides written assistance to taxpayers regarding the appraisal and assessment of their property for property tax purposes. Prepares written responses to taxpayers to address their concerns, describing both the basis of the findings and instructing the taxpayer on their rights within the process. Maintain records on taxpayer contacts and cases worked. Assists management and senior level appraisers with the more complex change in ownership and new construction events resulting in appraising the taxpayer’s property for property tax purposes. | | | |
| 15% | Program Review and Taxpayer Education Projects:  As a member of a team, assist in reviewing procedures for distribution of information regarding property tax matters and procedures for the prompt resolution of board, assessor, and taxpayer inquiries or taxpayer complaints and problems to ensure such procedures are adequate. Assists other appraisers in the Advocate's office with research on property tax topics being examined for development of educational material, written in simple non-technical terms to help taxpayers understand various property tax topics. These educational projects are done to assist assessors in their efforts to provide education and instruction to local taxpayers for the purpose of promoting taxpayer understanding and compliance with property tax laws. | | | |
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|  | **MARGINAL JOB FUNCTIONS** | | | |
| 5% | Performs other job related duties, as needed. | | | |
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| **WORK ENVIRONMENT OR PHYSICAL ABILITIES REQUIRED FOR THE JOB** *(if applicable)***:** | | | | |
| Work Environment: | | | | |
| * Position is located in a multi-story building | | | | |
| Physical Abilities: | | | | |
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| Additional Requirements/Expectations: | | | | |
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| *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 | | | | | |
| |  |  | | --- | --- | | HRB Approval Date: 3/4/21 | C&P Analyst Initials: JPL | | | | | |
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