

COUNTY OF SONOMA - JOB DEMANDS ANALYSIS

JOB CLASSIFICATION: ASSESSMENT SPECIALIST (0395)

DEPARTMENT: CLERK-RECORDER-ASSESSOR

PHYSICAL DEMAND STRENGTH RATING: LIGHT

DATE COMPLETED: October 2024

DIVISION: ASSESSOR

INSTRUCTIONS TO MEDICAL PROVIDERS COMPLETING THIS FORM:

Please use the “Medical Provider Use Only” columns to the right of each section and the “Medical Provider’s Comments & Signature” Section on the signature page to provide work restrictions by indicating whether there is some portion of each function that the employee can perform; designating whether each restriction is temporary or permanent; and, if restriction is temporary, stipulating the expected duration of work restriction(s). To finalize the form, please provide the name of the employee evaluated and additional comments, as appropriate, then sign and date where indicated.

FREQUENCY RATING:

Frequency	Percentage of time per shift	Repetition (# times per shift)	8 Hr Shift	9 Hr Shift	10 Hr Shift	12 Hr Shift
Never/Not Required (NR)	n/a	n/a	n/a	n/a	n/a	n/a
Occasionally (O)	1 - 33%	1 – 100	0 - 2.5	0 - 3	n/a	n/a
Frequently (F)	34 - 66%	100 – 500	2.5 - 5.5	3 - 6	n/a	n/a
Continuously (C)	67 - 100%	500+	5.5 – 8	6 - 9	n/a	n/a

PART 1 - JOB DUTIES/FUNCTIONS:

A. Job Duty/Function	B. Job Duty #	C. Freq Rating	D. Equipment or tools used to perform (Describe)	E. Specialized Expertise, License, Certification Required? (Describe)	F. Essential or Non- Essential	Medical Provider Use Only: For each job duty/function, indicate in this column “Can Perform”, is “Temporarily Restricted” from performing, or is “Permanently Restricted” from performing.
Provides factual and procedural information to the public by various means, including in person and at property location, including: (change of ownership, assessment process/procedures, property tax exemptions, and exclusions). Receives information and documents from (public, landlords, attorneys, and others). Explains requirements for proper completion, related state laws and local policies. Must be able to listen, analyze and determine critical issues and respond under difficult circumstances. Use effective listening and analytical skills to identify and respond to critical issues with the appropriate response; communicate effectively and positively with the public who may be under stressful circumstances.	1	C	Computer, Email, Calculator, Phone, Printer, Scanner, Files, Headset	(Exemption and Ownership Units only) Temporary BOE Certification required upon hire; once hired, must complete application within one year Permanent BOE Certification required within one year of temp. cert, followed by continuing	E	

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				education		
Assists public and private agencies and the general public by phone, email and in person, furnishing information regarding ownership title changes, valuation, assessment processes and legal descriptions of property. Requires attention to detail and effective communication skills and the ability to handle stressful interactions.	3	F	Computer, Files, Headset, Calculator, Phone, Printer, Scanner	BOE Certification required for Exemption and Ownership Units	E	
Reviews claims and declarations and works with the State Board of Equalization in determining claimant eligibility for appropriate property tax exemptions. Requires attention to detail, Reviews claims and declarations and works with the State Board of Equalization in determining claimant eligibility for appropriate property tax exemptions. Requires attention to detail, organizational and prioritization skills, ability to research and interpret data, rules and regulations, analytical skills and ability to make arithmetic calculations quickly and accurately.	4	F/C	Computer, Files, Headset, Calculator, Phone, Printer, Scanner	BOE Certification required for Exemption and Ownership Units	E	
Examines legal documents relating to property transfer and determines reappraisability under the Revenue and Taxation Code based on examination of chain of title and interpretation of law. Requires attention to detail, ability to analyze and interpret and make sound business decisions based on complex information as well as to organize and prioritize.	5	F/C	Computer, Files, Headset, Calculator, Phone, Printer, Scanner	BOE Certification required for Ownership Units	E	
Establishes and updates information (including forms, files, and necessary records), generates documents and composes letters to taxpayers (and their legal representatives). Requires organization, analysis, interpretation of technical information and the ability to communicate effectively by phone, email and in person.	6	F	Computer, Files, Headset, Calculator, Phone, Printer, Scanner	BOE Certification required for Exemption and Ownership Units	E	
Resolves defects in change of title or legal descriptions by use of Recorder's Office computer records or through written or verbal correspondence with title companies, attorneys, or property owners. Requires attention to detail and analytical skills as well as the ability to communicate and work effectively with others.	7	O	Computer, Files, Headset, Calculator, Phone, Printer, Scanner	BOE Certification required for Ownership Units	E	
Examines and analyzes property appraisal records in order to complete and code appraisal worksheets. Requires organizational ability, attention to detail and ability to make arithmetic calculations quickly and accurately.	8	F	Computer, Files, Calculator, Phone, Printer, Scanner	BOE Certification required for Ownership Units	E	

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Calculates, interprets, and researches property values. Requires organizational ability, attention to detail and ability to make arithmetic calculations quickly and accurately.	9	F	Computer, Files, Calculator, Phone, Printer, Scanner	BOE Certification required for Exemption and Ownership Units	E	
Reviews appraisal records for completeness and accuracy. Requires organizational ability, attention to detail and ability to make arithmetic calculations quickly and accurately.	10	C	Computer, Files, Calculator, Phone, Printer, Scanner		E	
Assists appraisers with the interpretation and application of various system and procedural processes. Requires ability to convey technical information quickly and accurately and to develop sound working relationships.	11	O	Computer, Files, Headset, Calculator, Phone, Printer, Scanner	BOE Certification required for Ownership Units	E	
Researches and analyzes property appraisal records to make determinations regarding assessment roll corrections and applies appropriate Revenue & Taxation and appraisal codes.	12	C	Computer, Files, Headset, Calculator, Phone, Printer, Scanner	BOE Certification required for Exemption and Ownership Units	E	
Processes segregations, prorations and assessment appeals. Requires organizational ability, attention to detail and ability to make arithmetic calculations quickly and accurately.	13	O	Computer, Files, Headset, Calculator, Phone, Printer, Scanner	BOE Certification required for Exemption and Ownership Units	E	
Organizes property transfer documents according to type; examines documents pertaining to property transfer and determines status of transfer; researches and analyzes documents for property ownership; determines if property is subject to reappraisal based on examination of chain of title and interpretation of law.	14	C	Computer, Files, Headset, Calculator, Phone, Printer, Scanner	BOE Certification required for Ownership Units	E	
Prepares ownership information, calculates, and tracks percentages of ownership interest, and enters ownership data into computer files.	15	C	Computer, Files, Headset, Calculator, Phone, Printer, Scanner	BOE Certification required for Ownership Units	E	
Enters, retrieves, and updates data from electronic data processing systems and computer programs.	16	C	Computer, Files, Headset, Calculator, Phone, Printer, Scanner	BOE Certification required for Exemption and Ownership Units	E	
Performs on-site field inspection to determine whether claimant's use of the property meets the qualifications for exemption. Provides written findings to the claimant. Calculates and enrolls property tax exemption values into the property tax system.	17	O	Vehicle, Files	Driver's License, vehicle, BOE Certification required for Exemption Units		

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Interprets Revenue & Taxation codes and explains state law and policies related to property tax exemptions to property owners and representatives. Verbal communication required, and ability to remain composed during stressful situation if needed.					E	
May train new employees and may lead others in the absence of a designated supervisor or as assigned. Requires ability to communicate effectively and to use sound judgment.	18	O	Computer, Files, Headset, Calculator, Phone, Printer, Scanner	BOE Certification required for Exemption and Ownership Units	E	
Items 1-18 require computer database searching and research in hard copy files. Keyboarding, mouse and handwriting skills are required.	19	C	Computer, Files, Headset, Calculator, Phone, Printer, Scanner, Vehicle	BOE Certification required for Exemption and Ownership Units	E	

PART 2: PHYSICAL DEMANDS

Activity	Examples of Duties/Functions Requiring Activity	FREQUENCY RATING Not Req., Occasional; Frequent, or Constant	MEDICAL Can Perform	PROVIDER Temporarily Restricted	USE ONLY: Permanently Restricted
1 Sitting	1-19	F			
2 Walking	1, 11, 17-18	F			
3 Running	N/A	NR			
4 Standing	1-19	F			
5 Bending-Neck	1-19	C			
6 Bending-Waist	1-19	O			
7 Squatting	N/A	NR			
8 Climbing	N/A	NR			
9 Kneeling	N/A	NR			
10 Crawling	N/A	NR			
11 Twisting (neck)	1-19	F			
12 Twisting (waist)	1-19	O			
13 Repetitive Hand Use	1-19	C			
14 Simple Grasping-Right Hand (mousing)	1-19	F			
15 Simple Grasping-Left Hand (mousing)	1-19	F			
16 Power Grasping-Right Hand	N/A	NR			
17 Power Grasping-Left Hand	N/A	NR			
18 Fine Manipulation-Right Hand (writing, paper clips, shuffling paper)	1-19	O			
19 Fine Manipulation-Left Hand (writing, paper clips, shuffling paper)	1-19	O			
20 Pushing and Pulling (right hand)	N/A	NR			
21 Pushing and Pulling (left hand)	N/A	NR			
22 Reaching (above shoulder level)	1-19	O			
23 Reaching (below shoulder level)	1-19	O			
24 Lifting-up to 10 lbs.	1-19	F			
25 Lifting-11-25 lbs.	1-19	O			
26 Lifting-26-50 lbs.	N/A	NR			
27 Lifting 51-75 lbs.	N/A	NR			
28 Lifting 76-100 lbs.	N/A	NR			
29 Lifting 100 + lbs.	N/A	NR			
30 Carrying 0-10 lbs.	1-19	F			
31 Carrying 11-25 lbs.	1-19	O			
32 Carrying 26-50 lbs.	N/A	NR			
33 Carrying 51-75 lbs.	N/A	NR			
34 Carrying 76-100 lbs.	N/A	NR			

PART 3: SENSORY REQUIREMENTS

Activity	Examples of Duties/Functions Requiring Activity	FREQUENCY RATING Not Req., Occasional; Frequent, or Constant	MEDICAL Can Perform	PROVIDER Temporarily Restricted	USE ONLY Permanently Restricted
1 Functional vision, normal or corrected	1-19	C			
2 Functional color vision, normal or corrected	1-19	O			
3 Functional night vision, normal or corrected	N/A	NR			
4 Functional hearing, normal or corrected	1-19	C			
5 A sense of smell or taste	N/A	NR			

PART 4: COMPREHENSION LEVEL

Activity	FREQUENCY RATING Not req., Occasional; Frequent, or Constant	MEDICAL Can Perform	PROVIDER Temporarily Restricted	USE ONLY Permanently Restricted
1 Follow Oral Instructions	C			
2 Follow Written Instructions	C			
3 Required to sustain concentration	C			

PART 5: NATURE OF TASKS

Activity	FREQUENCY RATING Not req., Occasional; Frequent, or Constant	MEDICAL Can Perform	PROVIDER Temporarily Restricted	USE ONLY Permanently Restricted
1 Follow set procedures	C			
2 Organize own work	C			
3 Able to ask questions or request assistance when needed	C			
4 Required to make decisions independently	C			
5 Required to train and/or lead other staff	O			
6 Required to direct other staff (e.g. planning, goal setting, performance)	O			

PART 6: WORK PACE

Activity	FREQUENCY RATING Not req., Occasional; Frequent, or Constant	MEDICAL Can Perform	PROVIDER Temporarily Restricted	USE ONLY Permanently Restricted
1 Tightly scheduled and rapid pace of work activities at high volume	F			
2 Meet time sensitive deadlines	C			
3 Long and/or irregular hours	O			
4 Limited/unpredictable opportunity for breaks	NR			
5 Required to perform on-call or emergency work	NR			

PART 7: COMPLEXITY/VARIABILITY

Activity	FREQUENCY RATING Not req., Occasional; Frequent, or Constant	MEDICAL Can Perform	PROVIDER Temporarily Restricted	USE ONLY Permanently Restricted
1 Variable and unpredictable workflow	C			
2 Attention divided by issues requiring multi-tasking	C			
3 Work requires precise attention to detail	C			
4 Use of judgment in routine matters	C			
5 Requires use of judgment in adapting procedures from one task to another	C			
6 Possible legal ramifications associated with work activities or work product	C			

PART 8: INTERACTIONS WITH OTHERS

Activity	FREQUENCY RATING Not req., Occasional; Frequent, or Constant	MEDICAL Can Perform	PROVIDER Temporarily Restricted	USE ONLY Permanently Restricted
1 Works with others (e.g., co-workers, other departments/agencies, public)	C			
2 Interactions limited to giving/receiving information	NR			
3 Interactions exceed giving/receiving information (e.g., advises, persuades, justifies)	F			
4 Interactions occur under circumstances of emotional stress	F			
5 Risk of confrontation with violent or assaultive clients or customers	O			

PART 9: ENVIRONMENTAL FACTORS/WORKING CONDITIONS:

Activity	FREQUENCY RATING Not req., Occasional; Frequent, or Constant	MEDICAL Can Perform	PROVIDER Temporarily Restricted	USE ONLY Permanently Restricted
1 Work Inside	C			
2 Work Outside	O			
3 Extreme Heat (above 100 degrees)	NR			
4 Extreme Cold (below 32 degrees)	NR			
5 Excessive Noise (must raise voice to be heard)	O			
6 Vibration (e.g., jack hammer, hammer drill, chainsaw, etc.)	NR			
7 Dust, Vapors, Fumes, Smoke	NR			
8 Silica, asbestos, etc.	NR			
9 Solvents (e.g., gas, turpentine, etc.)	NR			
10 Grease, oils	NR			
11 Acidic, Caustic Solutions	NR			
12 Pesticides	NR			
13 Explosives (e.g., dynamite, bomb, etc.)	NR			
14 Cleaning supplies, abrasives	NR			
15 Other Chemicals (e.g. drugs and other contraband)	NR			
16 Human Blood, Body Tissues, or Fluids	NR			
17 Human Wastes	NR			
18 Animal Blood, Body Tissues, or Fluids	NR			
19 Animal Wastes	NR			
20 Biological Toxins (e.g., poison ivy, poison oak, anthrax, etc.)	NR			
21 Insect Bites (e.g., ticks, mosquitos, spiders, etc.)	O			
22 Biomedical Waste	NR			
23 Ionizing Radiation	NR			
24 Non-Ionizing Radiation	NR			
25 Electrical Energy	NR			
26 Walking on uneven, slippery, or rough surfaces	O			
27 Proximity to moving mechanical parts (e.g., equipment, machinery)	NR			
28 Proximity to moving vehicles or objects	NR			
29 Heights (e.g., rooftop, ladders, scaffolding, etc.)	NR			
30 Contact with water, other liquids, humid conditions - not weather related	NR			
31 Work Below Ground: (e.g., excavation, trench, etc.)	NR			
32 Potential exposure to airborne infectious diseases (e.g. clinics, labs, corrections)	NR			
33 Operates non-commercial motor vehicles (cars, trucks)	O			
34 Operates commercial vehicles – CDL Class _____ Endorsements _____	NR			
35 Operates passenger van to transport clients, inmates, etc.	NR			
36 Pulls non-commercial trailers or equipment	NR			
37 Operates heavy equipment	NR			
38 Other:				

PART 10: MEDICAL SCREENING, SURVEILLANCE AND VACCINATION REQUIREMENTS:

Please check each of the medical screening, surveillance, and vaccination requirements that apply to the position, and indicate if the requirement applies pre-employment/pre-placement only, or whether there are additional requirements after hire.

Medical Screening, Surveillance or Vaccination	Pre-Hire	Post-Hire	Frequency (one time, annual, etc.)
1 Audiometric Testing			n/a
2 DOT Commercial Driver Drug and Alcohol Screening			n/a
3 DOT Commercial Driver Physical Exam			n/a
4 Respirator Physical Exam			n/a
5 Respirator Questionnaire – Short			n/a
6 Respirator Questionnaire – Standard			n/a
7 Blood lead level			n/a
8 Hazardous Waste/Emergency Worker physical			n/a
9 Heavy metal screen (mercury, lead, arsenic)			n/a
10 HINT Hearing Noise Sensitivity Testing			n/a
11 Tuberculosis skin test			n/a
12 Vaccine: MMR			n/a
13 Vaccine: Hepatitis B			n/a
14 Vaccine: Influenza			n/a
15 Vaccine: Meningococcal			n/a
16 Vaccine: Pneumococcal			n/a
17 Vaccine: Rabies			n/a
18 Vaccine: Rabies Titer			n/a
19 Vaccine: Tdap			n/a
20 Vaccine: Chickenpox			n/a

PART 11: ADDITIONAL INFORMATION, PICTURES, ETC.