



Exemption Specialist

J o b D e s c r i p t i o n

JOB INFORMATION

Approved Date:	8/10/2023 5:33:49 PM
Working Title:	Exemption Specialist
Job Family:	Program
Classification:	Program Technician

ORGANIZATION

Department:	Assessors
Cost Center/Program:	9151 - Assessor
Exemption Status:	Non Exempt
Union:	AFSCME 1308 - Courthouse

JOB SUMMARY

Positions in this series perform analytical, planning, and coordination work for a specific program. Positions perform work requiring knowledge and experience that is specific to a program. Organize and perform work related to program operations independent of the daily administrative office needs of the supervisor. Represent the program to clients, participants and/or members of the public.

A program is a specialized area with specific complex components and discrete tasks which distinguish it from the main body of an organization. A program is specific to a particular subject. The specialized tasks involve interpretation of policies, procedures and regulations, budget coordination/administration, independent functioning and typically, public contact. Duties are not of a general support nature transferable from one program to another. Performance of clerical duties is in support of incumbent's performance of specialized tasks.

Distinguishing Characteristics

This is the first level within a six level Programs series. This classification is distinguished from the second level within the series in that incumbents assist on projects and are considered entry level. Work is performed under direct supervision at the Program Technician level, while the Programs Specialist performs program and project development tasks on an independent basis with minimal direction and guidance. The Programs Technician gathers data and prepares information for others to review and may handle routine inquiries about the subject matter, program or project. The incumbent is not required to have program-specific experience upon entry into the position.

Under the direction of the assigned supervisor, performs technical work related to property tax exemptions & deferral programs including the senior citizen & disabled persons, nonprofit, open space, farm & agricultural and designated forest land. Processes complex personal property listings, department payroll, accounts payable, purchasing, and budget tracking. Responsible for customer service including in-person, telephone, and email as well as maintenance of web pages, public outreach, and public information projects. Responsible for specialized office support activities governed by law. Maintenance of confidential documents. Work is performed with minimal supervision and employee has relative independence for exercising independent judgment within established policies and laws.

JOB FUNCTIONS

Essential Functions

Essential Function	% TIME
Administer property tax exemption and deferral programs including but not limited to, the Disabled and Senior Citizen programs, Current Use, Designated Forest Land and Nonprofits. Performs income audits. Reviews and calculates qualifying income from IRS tax forms and supporting documents.	60%

Essential Functions

Essential Function	% TIME
Approves/denies and removes applicants from the exemption programs as well as defends decision on behalf of the Assessor to the public and at the Board of Equalization. Review sale excises for exempt properties and complete prorations when exemption is removed. Determine and prepare a request if an exempt property requires a sub account. Review incomes for Homes for the Aging exemption. Prepare metrics for supervisor and evaluate processes to meet deadlines, etc.	
Processing payroll, accounts payable, ordering and maintaining inventory of supplies, tracking budget line items, Assessor correspondence, maintaining confidentiality, SharePoint Coordinator, process personal property, maintain appeals and assessment roll corrections, conduct field visits.	15%
Customer Service. Assist senior/disabled applicants with completing necessary forms. Provide communication and updates about application status. Educate public on program criteria and requirements.	25%

Required for All Jobs

• Performs other duties as assigned
• Complies with all policies and standards

This Job is Essential	☐
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QUALIFICATIONS

Education			
Education Level	Education Details	Required/ Preferred	
Associate's Degree	in a field closely related to the program.	Required	

Work Experience

Experience	Experience Details	Required/ Preferred	
1 year	of experience providing technical administrative program support closely related to the program.	Required	
	experience with IRS Federal Income Tax or similar income documentation.	Preferred	

Licenses and Certifications

Licenses/Certifications	Licenses/Certification Details	Time Frame	Required/ Preferred	
	N/A: Does not operate County-owned vehicles.			

Equivalency

Relevant work experience demonstrating required knowledge, skills, and abilities may substitute for educational requirements. Work experience is essential and cannot be replaced by additional education.
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Knowledge, Skills and Abilities

KSAs
Appear for scheduled work and complete assigned tasks within a reasonable period of time.
Establish and maintain effective working relationships with others using tact, courtesy and good judgment.
Maintain confidentiality and adhere to policy and procedures of the county and department.

KSAs	
Communicate effectively orally and in writing.	
Utilize various computer applications specific to the department including databases, word processing, document imaging, spreadsheets, and web-based systems for entering, retrieving and researching data and records.	
Physically perform assigned duties and essential functions of the position.	
Knowledge of research methods	
Knowledge of County, State, and Federal laws and regulations pertaining to the program	
Knowledge of principles and methods associated with public information dissemination	
Skill in learning office practices and procedures	
Skill in basic quantitative skills	
Skill in gathering, manipulating and using data utilizing a computer and other tools	
Skill in providing program advice and education to the public	
Skill in operating office equipment.	
Skill in following clearly stated oral & written instructions or procedures.	
Skill in establishing & maintaining effective working relationships as required by work assignments.	
Skill in keyboarding (speed required may vary according to position assignment).	
Skill in data entry and MS Office Suite (knowledge of software programs varies according to position assignment)."	
" Ability to read, interpret, evaluate, and apply a variety of complex written materials including laws, rules, codes, reference materials, and legal documents.	
Ability to interpret program directives and use initiative and sound judgment in application.	
Ability to retrieve, research, interpret and analyze data.	
Ability to make sound decisions based on RCW's and WAC's.	
Ability to effectively communicate orally and in writing.	
Ability to maintain organization, problem solving and customer service.	
Ability to prioritize workload and adapt to changes as needed.	
Ability to deal tactfully and courteously with the public, including irate or argumentative customers.	
Ability to maintain professional demeanor under heavy workload and stressful situations.	
Ability to maintain confidentiality and adhere to policy and procedures within the department.	
Ability to establish and maintain effective working relationships with other staff, the citizens, and representatives of other agencies.	
Ability to appear for scheduled work with regular, reliable, and punctual attendance.	
Ability to physically perform assigned duties and essential functions of the position."	

Core Competencies

Demonstrates values-based competencies in line with the core values that are the foundation of all activities performed by employees in order to achieve the Mission of the Company:	
Time Management	Uses their time effectively and efficiently; values time; concentrates their efforts on the more important priorities; gets more done in less time than others; can attend to a broader range of activities.
Drive for Results	Can be counted on to exceed goals successfully; is constantly and consistently one of the top performers; very bottom-line oriented; steadfastly pushes self and others for results.
Customer Focus	Is dedicated to meeting the expectations and requirements of internal and external customers; gets first-hand customer information and uses it for improvements in products and services; acts with customers in mind; establishes and maintains effective relationships with customers and gains their trust and respect.

Remote Employment	
Remote Employment Type:	
Remote Employment Text:	

Weight Bearing Activities

Physical Activity Performed	Frequency/Percentage Time/Max Time	Examples of how activity is performed
Weight Bearing (Standing & Walking)		
Weight Bearing Standing		
Weight Bearing - Walking		
Walking on Uneven Terrain	Occasionally: 11-33% - Occurs 31 minutes to 2.5 hours per shift.	remote sites or field work
Running		
Jumping		
Climbing Ladder, stairs, stools	Seldom/Infrequent: 1-10% - May occur, but not on a daily basis or less than 30 minutes per shift.	may periodically climb stairs
Balancing	Seldom/Infrequent: 1-10% - May occur, but not on a daily basis or less than 30 minutes per shift.	to access low filing cabinets/shelves
Bending at the waist	Seldom/Infrequent: 1-10% - May occur, but not on a daily basis or less than 30 minutes per shift.	accessing files, office supplies, and equipment
Twisting at the waist	Seldom/Infrequent: 1-10% - May occur, but not on a daily basis or less than 30 minutes per shift.	to access low filing cabinets/shelves
Stooping		
Slight bend at knees		
Squatting		
	Continuously: 67%+ - Occurs more than 5.6 hours per shift.	

Other - Non-Weight Bearing

Physical Activity Performed	Frequency/Percentage Time/Max Time	Examples of how activity is performed
Sitting	Continuously: 67%+ - Occurs more than 5.6 hours per shift.	
Kneeling One or both knees		
Crawling On hands and knees		
Lying Down		
Back, side or stomach		

Lifting/Carry/Push/Pull

Lifting

Physical Activity Performed	Frequency/Percentage Time/Max Time	Examples of how activity is performed
Lifting 0-10 lbs	Occasionally: 11-33% - Occurs 31 minutes to 2.5 hours per shift.	Office supplies, paperwork and files
Lifting 11-20 lbs	Seldom/Infrequent: 1-10% - May occur, but not on a daily basis or less than 30 minutes per shift.	Office supplies, paperwork and files

Lifting

Physical Activity Performed	Frequency/Percentage Time/Max Time	Examples of how activity is performed
Lifting 21-35 lbs	Seldom/Infrequent: 1-10% - May occur, but not on a daily basis or less than 30 minutes per shift.	Office supplies, paperwork and files
Lifting 36-50 lbs	Never: 0% - Does not occur ever, or may not ever occur for some incumbent.	
Lifting 50 + lbs	Never: 0% - Does not occur ever, or may not ever occur for some incumbent.	

Carry

Physical Activity Performed	Frequency/Percentage Time/Max Time	Examples of how activity is performed
Carry 0-10 lbs	Occasionally: 11-33% - Occurs 31 minutes to 2.5 hours per shift.	Office supplies, paperwork and files
Carry 11-20 lbs	Seldom/Infrequent: 1-10% - May occur, but not on a daily basis or less than 30 minutes per shift.	Office supplies, paperwork and files
Carry 21-35 lbs	Seldom/Infrequent: 1-10% - May occur, but not on a daily basis or less than 30 minutes per shift.	Office supplies, paperwork and files
Carry 36-50 lbs	Never: 0% - Does not occur ever, or may not ever occur for some incumbent.	
	Never: 0% - Does not occur ever, or may not ever occur for some incumbent.	

Pushing

Physical Activity Performed	Frequency/Percentage Time/Max Time	Examples of how activity is performed
Pushing 0-10 lbs	Seldom/Infrequent: 1-10% - May occur, but not on a daily basis or less than 30 minutes per shift.	file drawers, office equipment, files
Pushing 11-20 lbs	Seldom/Infrequent: 1-10% - May occur, but not on a daily basis or less than 30 minutes per shift.	file drawers, office equipment, files
Pushing 21-35 lbs	Never: 0% - Does not occur ever, or may not ever occur for some incumbent.	
Pushing 36-50 lbs	Never: 0% - Does not occur ever, or may not ever occur for some incumbent.	
	Never: 0% - Does not occur ever, or may not ever occur for some incumbent.	

Pulling

Physical Activity Performed	Frequency/Percentage Time/Max Time	Examples of how activity is performed
Pulling 0-10 lbs	Seldom/Infrequent: 1-10% - May occur, but not on a daily basis or less than 30 minutes per shift.	file drawers, office equipment, files
Pulling 11-20 lbs	Seldom/Infrequent: 1-10% - May occur, but not on a daily basis or less than 30 minutes per shift.	file drawers, office equipment, files
Pulling 21-35 lbs	Never: 0% - Does not occur ever, or may not ever occur for some incumbent.	
Pulling 36-50 lbs	Never: 0% - Does not occur ever, or may not ever occur for some incumbent.	
	Never: 0% - Does not occur ever, or may not ever occur for some incumbent.	

Upper Extremity/Arm Movement

	Dominant Arm - Frequency/Percentage Time/Max Time	Non-Dominant Arm - Frequency/Percentage Time/Max Time	Examples of how activity is performed
Reaching Above shoulder level	Seldom/Infrequent: 1-10% - May occur, but not on a daily basis or less than 30 minutes per shift.	Seldom/Infrequent: 1-10% - May occur, but not on a daily basis or less than 30 minutes per shift.	accessing files, office supplies, and equipment
Reaching at shoulder level	Seldom/Infrequent: 1-10% - May occur, but not on a daily basis or less than 30 minutes per shift.	Seldom/Infrequent: 1-10% - May occur, but not on a daily basis or less than 30 minutes per shift.	accessing files, office supplies, and equipment
Reaching below shoulder level	Seldom/Infrequent: 1-10% - May occur, but not on a daily basis or less than 30 minutes per shift.	Seldom/Infrequent: 1-10% - May occur, but not on a daily basis or less than 30 minutes per shift.	accessing files, office supplies, and equipment
Steering Equipment, Vehicles			

Cervical Spine/Neck Movement

Physical Activity Performed	Frequency/Percentage Time/Max Time	Examples of how activity is performed
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Upper Extremity/Hand Activities

	Dominant Arm - Frequency/Percentage Time/Max Time	Non-Dominant Arm - Frequency/Percentage Time/Max Time	Examples of how activity is performed
Fine Manipulation			
Keyboarding/Typing			
Simple Grasp	Seldom/Infrequent: 1-10% - May occur, but	Seldom/Infrequent: 1-10% - May occur, but	office supplies, equipment, phone

Upper Extremity/Hand Activities

	Dominant Arm - Frequency/Percentage Time/ Max Time	Non-Dominant Arm - Frequency/Percentage Time/ Max Time	Examples of how activity is performed
	not on a daily basis or less than 30 minutes per shift.	not on a daily basis or less than 30 minutes per shift.	
Up & Down Flexion of Wrist			
Side to Side Motion of Wrist			
Turning/Rotation of wrist/hand			
Gross Manipulation			
Powerful Grasp/Tight Grasp	Seldom/Infrequent: 1- 10% - May occur, but not on a daily basis or less than 30 minutes per shift.	Seldom/Infrequent: 1- 10% - May occur, but not on a daily basis or less than 30 minutes per shift.	office supplies, equipment, phone
Hand Controls			
Repetitive Motion			

Sensory Functions (See, Hear, Smell)

Physical Activity Performed	Frequency/Percentage Time/Max Time	Examples of how activity is performed
Sight: Distinguish objects, depth perception, field of vision, color identification, near and far acuity necessary to operate equipment, machinery, etc.	Continuously: 67%+ - Occurs more than 5.6 hours per shift.	documents computer screen, files may be color coded
Hearing: Comprehend oral language and sounds and react appropriately. Follow oral directions.	Continuously: 67%+ - Occurs more than 5.6 hours per shift.	
Speaking: Orally communicate information and ideas with comprehension	Continuously: 67%+ - Occurs more than 5.6 hours per shift.	
Reading: Comprehend and retain the written word.	Continuously: 67%+ - Occurs more than 5.6 hours per shift.	documents computer screen
Writing: Composing communications in writing		
Math: Compute a series of numeric variables, measurements		

Working Conditions

Physical Activity Performed	Frequency/Percentage Time/Max Time	Examples of how activity is performed
Uneven Ground	Never: 0% - Does not occur ever, or may not ever occur for some incumbent.	
Exposure to Bloodborne Pathogens		
Work Outside	Never: 0% - Does not occur ever, or may not ever occur for some incumbent.	
Customer/Public Contact		
Work Inside	Continuously: 67%+ - Occurs more than 5.6 hours per shift.	office environment
High Elevations	Never: 0% - Does not occur ever, or may not ever occur for some incumbent.	
Moving Objects	Never: 0% - Does not occur ever, or may not ever occur for some incumbent.	
Slippery Surface	Never: 0% - Does not occur ever, or may not ever occur for some incumbent.	
Wetness	Never: 0% - Does not occur ever, or may not ever occur for some incumbent.	
Temp.Humid/ Extremes	Never: 0% - Does not occur ever, or may not ever occur for some incumbent.	
Temp. Cold Temp	Never: 0% - Does not occur ever, or may not ever occur for some incumbent.	
Confined Spaces	Never: 0% - Does not occur ever, or may not ever occur for some incumbent.	
Special Clothing	Continuously: 67%+ - Occurs more than 5.6 hours per shift.	semi-professional attire
Vibration	Never: 0% - Does not occur ever, or may not ever occur for some incumbent.	
Use of Solvents	Never: 0% - Does not occur ever, or may not ever occur for some incumbent.	
Use of Detergent	Never: 0% - Does not occur ever, or may not ever occur for some incumbent.	
Chemical Contact	Never: 0% - Does not occur ever, or may not ever occur for some incumbent.	
Chemical Vapors	Never: 0% - Does not occur ever, or may not ever occur for some incumbent.	
Dust or Particles	Seldom/Infrequent: 1-10% - May occur, but not on a daily basis or less than 30 minutes per shift.	
Toxic Substances		
Explosives		
Radiation		
Electricity		
Noise intensity		

Mental/Psychological Demands

Mental/Psychological Demands	Required Yes/No (Blank)	Examples
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Operational Equipment

Physical Activity Performed	Frequency/Percentage Time/Max Time	Examples of how activity is performed
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Other Requirements

PRE-EMPLOYMENT EXAMS

POST-EMPLOYMENT

COMPENSATION

Annual Max:	\$0.00
Annual Min:	\$0.00
Hourly Max:	\$37.96
Hourly Min:	\$29.67