

PROPERTY VALUATION SPECIALIST ROLE

Role Summary

The Property Valuation Specialist Role consists of four grade levels (8-11). Incumbents serve as the initial contact for internal and external customers and are responsible for assisting with the completion and processing of tax related forms. They also perform desk audits for valuation purposes and maintain all ownership records for ad valorem tax purposes. Work ranges from maintaining tax system information; conducting and finalizing basic desk audits on personal property reporting forms for accuracy, valuation, and compliance; to field audits of personal property; assisting county officials prepare value comparisons; preparing notification when ownership or certificate of survey errors occur; and providing value adjustments. Primary contacts are with regional managers; area managers; appraisers; cartographers; the State Tax Appeal Board (STAB); County Tax Appeal Board (CTAB); internal/external customers; and local, state, federal, and tribal governmental representatives.

Working Conditions

Work often involves high stress situations due to work deadlines and volume. Extensive computer and keyboard use and sitting or standing for long periods of time. Travel may be necessary. Must possess a valid driver's license. During assessment and tax paying periods there is a great deal of stress and pressure due to answering and dealing with taxpayers who can be irate and hostile at times.

Education and Experience

- Grade 8: competencies and degrees of proficiency are typically acquired through a combination of education and experience equivalent to high school graduation and two years of general office experience including customer service. Other combinations of education and experience will be evaluated on an individual basis.
- Grade 9: competencies and degrees of proficiency are typically acquired through a combination of education and experience equivalent to high school graduation, two years of clerical experience including customer service, and six months of experience reviewing and completing forms related to taxation and basic bookkeeping tasks. Other combinations of education and experience will be evaluated on an individual basis.
- Grade 10: competencies and degrees of proficiency are typically acquired through a combination of education and experience equivalent to high school graduation, three years of clerical work including basic auditing or accounting and two years of appraisal, assessment, data processing, or related experience. Other combinations of education and experience will be evaluated on an individual basis.
- Grade 11: competencies and degrees of proficiency are typically acquired through a combination of education and experience equivalent to post-secondary training in business, auditing, accounting, or a related field and three years of appraisal, assessment, data processing, or related experience. Other combinations of education and experience will be evaluated on an individual basis.

Department Core Competencies

In addition to the role specific competencies, there are four, department core competencies that all employees are expected to successfully achieve. These are:

- *Interpersonal Skills:* Builds constructive and effective relationships with internal and external customers and is committed to meeting customer needs in a timely and accurate manner. Listens actively and attentively and demonstrates an appreciation of other perspectives. Builds the appropriate rapport required to do business. Openly demonstrates an understanding of and respect for the value of co-workers' contributions to the department mission.
- *Decision-Making and Accountability:* Considers the department's vision, mission, and values in making decisions and taking actions. Identifies and considers possible alternatives before making decisions. Bases decisions on achieving desired outcomes pursuant to the departmental business plan or management direction. Uses a combination of analysis, experience, and sound judgment that results in fairness and consistency, while being accountable for actions. When serious ethical issues are at stake, takes all necessary actions.
- *Commitment to Continuous Improvement:* Ability and willingness to continually seek greater efficiency in agency programs, is results driven, and meets changing requirements in work or direction. Adapts to changing conditions and work responsibilities. Accepts constructive criticism and suggestions and uses them to improve performance.
- *Personal and Work Ethics:* Creates own measures of excellence, and practices what he/she promotes. Sets goals that provide challenges and measures goal attainment regularly. Displays a contagious optimism about the work to be done. Goes beyond traditional ways to address issues despite obstacles or resistance. Is able to generate ideas, fresh perspectives, and original approaches and engages in open-minded thinking. Employs strategies to promote ideas and proposals to increase probability of acceptance. Mentors others to improve the performance necessary to achieve success. Reflects a belief that the results achieved are a direct result of his/her personal decisions and actions.

Grade Levels

Each grade level lists the essential duties that describe work performed 50 percent or more of the time (predominant work). Established work plans identify day-to-day tasks.

Grade 8

Predominant/Essential Duties

- General correspondence.
 - Perform functions necessary for correspondence and forms mailing.
 - Mail newly identified business personal property reporting forms.
 - Mail sales verification and income and expense forms to seller for commercial sales.
 - Maintain customer records on the Business Equipment Valuation System (BEVS), Montana Ownership Database (MODS), and Computer Assisted Mass Appraisal System (CAMAS).
 - Perform address changes.
 - Pre-enter sales information.
 - Identify new taxpayers for personal property taxation purposes.

- Check brand inspections for discovery and reporting of new and current personal property.
- Enter personal property, federal identification number, and social security number into BEVS.
- Update real property information, including general CAMA updates (permits).
- General taxpayer assistance.
 - Assist walk-in customers, phone contacts, and pull property record cards.
 - Copy maps, certificate of surveys, and other property tax records; pull records; etc.
 - Write the policy, calculate, and collect premiums for hail insurance.
 - Manually calculate mobile home tax prepayment.
- Update ownership information on MODS.
 - Review ownership document changes from Realty Transfer Certificates and deeds for accuracy and completeness.
 - In areas where no digital map coverage exists, update plat books and maps.
 - Research deeds as necessary to verify ownership for ad valorem tax changes.

Grade 9

Predominant/Essential Duties

- General taxpayer assistance.
 - Serve as an initial contact for written and oral taxpayer inquiries, answer initial inquiries, and resolve customer issues and concerns.
 - Maintain communications with customers, federal, state, tribal, and local government offices, and other areas within the department.
- Assist customers in completing AB26 forms.
- Provide assistance to customers for mobile home, personal property, and real property assessments.
- Assist customers in the completion, and then process PTAP, DAV, and 2EC forms.
- Enter property class codes, mill levies, and property values into county systems.
- Responsible for special move permits.
- BEVS valuation.
 - Initiate, prepare, conduct, and finalize basic desk audits on personal property reporting forms for accuracy, valuation, and compliance including estimated assessments and penalties when required by statute.
 - Identify potential personal property audit candidates.

Grade 10

Predominant/Essential Duties

- Complete levy district and railroad right-of-way property reports.
- Transfer taxes for billing to county systems and balance county systems.
- Perform ownership splits.
 - Identify property.
 - In areas where no digital map coverage exists, process and map certificates of survey.
 - Review neighborhoods and assign land classifications as determined by statutory guidelines.
 - Assign geocode and assessor code.
 - Enter information into CAMA and MODS.
 - In areas where no digital map coverage exists, delineate property on map.
 - In areas where no digital map coverage exists, update plat books and maps.
 - Prepare notification when ownership or certificates of survey errors occur.

- Identify and correct problems on end-of-day reports.
- Perform research for cartographers.
- Revise real property, personal property, and mobile home assessments for valuation adjustments.
- Assist county officials.
 - Prepare value comparisons.
 - Research ownership for tax deed process.
- Assist in processing special improvement districts.
- Defend personal property valuation assessments.

Grade 11

Predominant/Essential Duties

- Perform field audit functions regarding the validity and accuracy of personal property for farm, ranch, and business properties.
- Conduct personal property audits for all levels of companies.
- Certify values, mill levies, and levy districts to local governments.
- Perform personal property valuation.
- Represent the department at appeal hearings on personal property valuation assessments.

Competencies and Degrees of Proficiency

The Competency/Proficiency Chart identifies the role specific competencies, degrees of proficiency, and guidance required for each grade level. Role specific competencies describe the knowledge, skills, and abilities required to perform the essential duties. The degrees of proficiency indicate the difficulty and/or complexity level of the tasks and assignments.

Competency/Proficiency Chart - Property Valuation Specialist Role

Competencies	Grade 8 Under Guidance	Grade 9 Under Guidance	Grade 10 Minimal Guidance	Grade 11 Independently
Demonstrated ability to provide timely and effective written, oral, and interpersonal communication.	B	C	C	C
Proactively focus efforts and energy on successfully attaining goals and objectives, assuming accountability for decisions, actions, and results. Follow issues through to completion.	B	C	C	C
Demonstrated knowledge and skill to appropriately apply procedures, requirements, regulations, and policies relative to role.	A	B	B	C
Demonstrated knowledge and skill of word processing, spreadsheet, database, and software applications/programs relative to the role.	A	B	C	C
Demonstrated knowledge of conflict resolution skills relative to the role.	A	B	B	C
Demonstrated knowledge of department business processes and ability to apply that knowledge effectively.	A	B	B	B
Demonstrated knowledge and effective application of federal/state statutes, administrative rules, and state policies and procedures relative to the role.	A	B	C	C
Demonstrated general auditing knowledge.	A	B	C	C
Demonstrated knowledge of appraisal methodology for real and personal property valuation and assessment.	A	B	C	C
Demonstrated ability to research, collect data, and prepare necessary reports.	A	B	C	C
Demonstrated skill and ability to work on multiple tasks.	B	C	C	C
Demonstrated knowledge of a full range of mathematical skills relative to appraisal assignments	B	B	B	B
Demonstrated knowledge of general office practices.	A	B	B	B
Demonstrated knowledge of record management techniques and methods.	A	B	B	B
Demonstrated knowledge of general plotting/mapping methods and techniques.	A	B	C	C
Demonstrated knowledge of theories and practices of accounting, including various accounting systems	N/A	N/A	N/A	A
Demonstrated knowledge of contract and business law and ability to interpret laws and contracts.	A	A	A	B
Demonstrated knowledge of the "operation" of legal documents for ownership changes for taxation purposes.	A	B	C	C

Degree of Proficiency

A: A degree of knowledge, skill or ability commensurate with elementary-level tasks and assignments.

B: A degree of knowledge, skill or ability commensurate with intermediate-level tasks and assignments.

C: A degree of knowledge, skill or ability commensurate with advanced-level tasks and assignments.

D: An advanced degree of knowledge, skill or ability commensurate with considerable experience and the application of the competency to non-standard tasks and assignments.

E: The most advanced degree of knowledge, skill or ability evidencing complete mastery and understanding of the subject.