

COUNTY OF SONOMA - JOB DEMANDS ANALYSIS

JOB CLASSIFICATION: SUPERVISING ASSESSMENT SPECIALIST (0397)
DEPARTMENT: CLERK-RECORDER-ASSESSOR
PHYSICAL DEMAND STRENGTH RATING: SEDENTARY OR LIGHT

DATE COMPLETED: 03/20/2026
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. Frequency 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.
While performing the following duties, employees in this position work in a typical office setting, sitting for long periods of time and routinely using office equipment such as computers, phones, printers, fax machines, files, etc.		C	Computer, Phone, Headset, Printer, Scanner, Calculator, Files,		E	
Ownership and Exemptions Units Only (excludes Value Entry): This position requires a temporary BOE Certification upon hire. Once hired, they must complete the application within one year. Permanent BOE Certification required within one year of temporary certification, followed by continuing education.		O		BOE Certification	E	

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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.	1	C			E	
Trains staff in the interpretation and application of various system and procedural processes as they are updated or as part of continuing education. Conveys technical information quickly and accurately.	2	F			E	
Develops, implements, and revises changes in Unit policies and procedures; taking into consideration changes in laws pertaining to property taxation and valuation, and any other changes recommended by and conferring with the Board of Equalization (i.e. Letters to the Assessor). Provides legal interpretations for staff and the public and explain complex legal issues.	3	F			E	
Communicates by phone, in person, or by email or other written format with co-workers/managers, members of the public, taxpayer associations, real estate groups, and public and private agencies. Provides factual and procedural information, including but not limited to change of ownership, assessment process/procedures, complex assessment codes, regulations, property tax exemptions, and exclusions.	4	C			E	
Performs clerical tasks, including entering, retrieving, and updating data from electronic data processing systems and various computer programs, as well as filing/sorting documents.	5	C			E	
Identifies and analyzes complex assessment situations and recommends and implements solutions. Researches and interprets data, rules and regulations.	6	F			E	
Approves Unit-related corrections to the assessment roll.	7	F			E	
Serves as the Unit's subject matter expert/consultant on Unit-related property taxation laws, reappraisal decisions, and valuations of real/business property, and may testify at appeals hearings and other courts of law. Provides highly technical advice to the Unit's legal representatives. Travel may be required to attend offsite meetings, appeals, hearings, etc.	8	O			E	

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.
Examines legal documents relating to property transfer and determining reappraisability and/or qualifications for an exemption under the Revenue and Taxation Code based on examination of chain of title and interpretation of law.	9	C			E	
Represents the Department for Unit-related topics at various conferences, workshops, and trainings. Travel may be required if offsite.	10	O			E	
Performs supervisory responsibilities, including, but not limited to: candidate selection, training, counseling and evaluating subordinate staff, etc.. Plans, directs, and reviews staff clerical work.	11	O			E	
Exemption Unit Only: Performs offsite field inspection to determine whether claimant's use of the property meets the qualifications for exemption. Provides written findings to the claimant.	12	O	Vehicle	Driver's License	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	1-12	F			
2 Walking	1, 4, 10, 12	O			
3 Running	N/A	NR			
4 Standing (sit-stand desks available)	1-12	O			
5 Bending-Neck (looking from documents to screen)	1-12	C			
6 Bending-Waist	1-12	O			
7 Squatting	N/A	NR			
8 Climbing	N/A	NR			
9 Kneeling	N/A	NR			
10 Crawling	N/A	NR			
11 Twisting (neck)	1-12	C			
12 Twisting (waist)	1-12	O			
13 Repetitive Hand Use	1-12	C			
14 Simple Grasping-Right Hand (mousing)	1-12	C			
15 Simple Grasping-Left Hand (mousing)	1-12	C			
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)	1-12	O			
19 Fine Manipulation-Left Hand (writing, paper clips, shuffling paper)	1-12	O			
20 Pushing and Pulling (right hand) (drawers)	1-12	O			
21 Pushing and Pulling (left hand) (drawers)	1-12	O			
22 Reaching (above shoulder level)	1-12	O			
23 Reaching (below shoulder level)	1-12	O			
24 Lifting-up to 10 lbs.	1-12	F			
25 Lifting-11-25 lbs. (moving file boxes)	1-12	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.	1-12	F			
31 Carrying 11-25 lbs. (moving file boxes)	1-12	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	1-12	C			
2 Functional color vision, normal or corrected	1-12	O			
3 Functional night vision, normal or corrected	N/A	NR			
4 Functional hearing, normal or corrected	1-12	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	C			
6 Required to direct other staff (e.g. planning, goal setting, performance)	C			

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 (if OT available)	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 (high level of accuracy in calculations, legal determinations, etc.)	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 (assessment determinations to effect property tax amounts)	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			

Activity	FREQUENCY RATING Not req., Occasional; Frequent, or Constant	MEDICAL Can Perform	PROVIDER Temporarily Restricted	USE ONLY Permanently Restricted
4 Interactions occur under circumstances of emotional stress (dealing with confrontational/emotional customers in person or by phone/email)	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)	NR			
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.