

SNOHOMISH COUNTY JOB DESCRIPTION

EXCISE SPECIALIST LEAD

Spec No.6369

BASIC FUNCTION

To lead the Excise Specialists and oversee the processing of all real estate transactions and collection of excise tax for the County Treasurer's Office. Develops, and implements procedures related to the processing of excise documents and the receipting of excise tax revenue due to changes in the R.C.W.'s (Revised Code of Washington) and W.A.C.'s, (Washington Administrative Code) and updates from Department of Revenue.

STATEMENT OF ESSENTIAL JOB DUTIES

1. Leads employees and subordinates as required; prioritizes and assigns daily work and trains subordinate level employees as necessary; reviews work in progress and upon completion to ensure accuracy and compliance with state laws and established procedures; assists management with administrative matters such as job applicant selection relating to excise staffing.
2. Organizes and coordinates aspects of excise staff production to maintain timely completion of excise documents submitted on a daily basis.
3. Analyzes and resolves technical excise transfers which subordinate level employees cannot answer; receives, investigates and resolves customer complaints; serves as technical support to other government agencies, financial institutions, law firms and other real estate professionals; serves as liaison with other county departments or government agencies.
4. Reviews, develops, updates and implements policies and written procedures related to the Treasurer's Office excise operations and the application of State R.C.W.'s and W.A.C. rules; discusses unique excise situations with Washington State Department of Revenue and updates excise department guidelines; submits changes to management for approval including an assessment of the impact of implementing the new updates, including staffing issues; assists excise staff in the application of laws, rules, and new procedures.
5. Acts as the Treasurer's excise representative in meetings regarding maintenance and upgrades of excise software systems;; facilitates communication between the Treasurer's Office, and County Department of Information Services (DIS), software vendor and electronic excise submitters and title companies as program or software issues arise; collecting, documenting, and providing detailed information as incidents occur.
6. Prepares monthly reports of excise tax volume and revenue for reporting and transmitting to the Washington State Department of Revenue as required by R.C.W.'s for excise record retention.
7. Provides County's memorandum of understanding (MOU) which details program and office requirements; sets up electronic excise access to new submitters; maintains records of all signed and current MOU's; seeks legal reviews for MOU's to verify any changes in requirements or language.

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STATEMENT OF ESSENTIAL JOB DUTIES (Continued)

8. Coordinate level employees cannot answer; receives, investigates and resolves customer complaints; serves as technical support to other government agencies, financial institutions, law firms and other real estate professionals; serves as liaison with other county departments or government agencies.
9. Reviews, develops, updates and implements policies and written procedures related to the Treasurer's Office excise operations and the application of State R.C.W.'s and W.A.C. rules; discusses unique excise situations with Washington State Department of Revenue and updates excise department guidelines; submits changes to management for approval including an assessment of the impact of implementing the new updates, including staffing issues; assists excise staff in the application of laws, rules, and new procedures.
10. Acts as the Treasurer's excise representative in meetings regarding maintenance and upgrades of excise software systems;; facilitates communication between the Treasurer's Office, and County Department of Information Services (DIS), software vendor and electronic excise submitters and title companies as program or software issues arise; collecting, documenting, and providing detailed information as incidents occur.
11. Prepares monthly reports of excise tax volume and revenue for reporting and transmitting to the Washington State Department of Revenue as required by R.C.W.'s for excise record retention.
12. Provides County's memorandum of understanding (MOU) which details program and office requirements; sets up electronic excise access to new submitters; maintains records of all signed and current MOU's; seeks legal reviews for MOU's to verify any changes in requirements or language.
13. Conducts regular unit meetings on both technical and production issues; maintains report of daily excise production by each staff member and provides monthly results to Office Supervisor.
14. Evaluates all submitted excise refund documentation, determines merit of claim, corresponds with Washington State Department of Revenue and issues refunds of excise tax when appropriate.

STATEMENT OF OTHER JOB DUTIES

1. Performs as backup for the department's public records request duties and attends regular training sessions.
2. Provides excise staff to assist cashiers as needed.
3. May perform all the duties of lower level employees as required.
4. Performs other duties as required.

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MINIMUM QUALIFICATIONS

Three (3) years of experience as an Excise Specialist is required; OR, the equivalent combination of training and/or experience that provides the required knowledge and abilities.

Ten (10) key data entry with accuracy of 90% and typing score of forty-five (45) words per minute required. Must pass job related tests.

PREFERRED QUALIFICATIONS

One (1) year of lead or supervisory experience is preferred.

KNOWLEDGE AND ABILITIES

Knowledge of:

Department of Revenue laws governing collection of excise and property tax;

W.A.C. rules, R.C.W.'s , county codes and other administrative codes related to transfers of real estate and property tax collection;

- Real Estate Excise Tax Affidavit submission, procedures and conformity;
- legal descriptions;
- legal document structure, conformity and recording fundamentals;
- real estate documents, deeds, contracts, debt/security instruments and easements;
- Assessor's tax parcel numbering and property information system;
- public records research techniques;
- training practices, methods and techniques;
- cash receipt methods and techniques;
- basic bookkeeping and arithmetic;
- conflict resolution;
- standard office practices any procedures;

Ability to:

- learn and retain complex real estate excise tax laws, legal document examination and rejection procedures;
- interpret and apply complex ordinances, legal document fundamentals and current legislation relating to transfers of real estate and excise tax;
- analyze complex legal documents for specific intent of instrument;
- read, interpret and apply property tax laws, regulations, laws and procedures;
- provide educated resolution to complicated excise transfers;
- accurately and timely manage a high volume of work;
- deal with constant interruptions;
- organize and lead the work of subordinates;
- effectively train, provide support and coordinate the work of subordinate employees;
- interact with customers in a tactful and courteous manner;
- exercise good judgment in making the decision to act independently;

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KNOWLEDGE AND ABILITIES

Ability to:

- establish and maintain effective working relationships with elected officials, management, peers and the general public;
- maintain ethical and professional standards of the office and county;
- communicate effectively both orally and in writing;
- operate software as required.

SUPERVISION

The Excise Specialist Lead receives limited supervision from a supervisor or an administrative designee as assigned. The work is reviewed by evaluation of results obtained.

WORKING CONDITIONS

The work is performed in the usual office environment. May occasionally be required to lift up to fifty (50) pounds and occasionally may have to work offsite.

Snohomish County is an Equal Employment Opportunity (EEO) employer. Accommodations for individuals with disabilities are provided upon request.

[EEO policy and ADA notice](#)

Class Established: December 2012 as Excise Lead
Revised and Retitled: Excise Lead, January 2014
EEO Category: 6 - Administrative Support
Pay Grade: 313 - Clerical Pay Plan
Workers Comp: 5306 Non-Hazardous