



PAO Exemptions Specialist

Category: Classified
Pay Grade: C20
Job Code: 20672

To perform this job successfully, an individual must be able to perform the essential job functions satisfactorily. Reasonable accommodations may be made to enable individuals with disabilities to perform the primary job functions herein described. Since every duty associated with this position may not be described herein, employees may be required to perform duties not specifically spelled out in the job description, but which may be reasonably considered to be incidental in the performing of their duties just as though they were actually written out in this job description.

JOB SUMMARY

Performs highly technical and specialized semi-professional full performance work in the Exemptions Department in support of maintaining personal or institutional exemptions on the tax roll; disseminates complex and/or detailed information about all personal or institutional exemptions to the public and data entry of exemptions information resulting from transfers and approved and denied exemptions; prepares and responds to correspondence related to complex exemption issues; coordinates exemptions related special projects; may act as Team Lead in the absence of the director; performs independently and/or collaboratively and exercises initiative and judgment in performing a variety of complex tasks related to exemptions; may train and lead others in performing a variety of exemptions-related tasks; responds to inquiries from the public on the methods, rules, regulations, and practices involved in administering exemptions.

ESSENTIAL JOB FUNCTIONS (examples, not all inclusive)

- Responds to complex inquiries from the public and Property Appraiser employees on the qualifications, methods, rules, regulations, and practices involved with basic and income-based personal or institutional exemptions;
- Maintains exemptions in computer-assisted mass appraisal (CAMA) on individual accounts, including approving, posting, denial, and removal of exemptions and all associated data changes such as ownership coding, tenancy coding, use %, and ownership % changes, to include recalculation of prior year assessed and taxable values;
- Corresponds with property owners regarding complex exemption issues via phone, mail, and email, keeping track of each contact via scanning or notes to meet public records requirements;
- Develops an advanced understanding of instruments of transfer including tenancy and ownership types (life estate, simple and intermediate trusts, and similar instruments);
- Develops an advanced understanding of Save Our Homes, Amendment 1, Portability, and other advanced legislative changes as required, and computes the impact of the most complex scenarios;
- Gathers information and evidence when an exemption is improper for referral to Director using online resources and personal interviews;
- Takes exemption applications in both the CAMA Wizard and OLEX (online) and assists customers through applications and questions, tests new releases, and assists with bugs;
- Assists with testing new CAMA releases and reports issues appropriately;
- Prepares research and presents cases at VAB hearings;
- Develops an advanced understanding of the VAB process and assists customers with VAB questions;
- Performs advanced exemptions related research and special projects;
- Performs other related job duties as assigned.

QUALIFICATIONS

Education and Experience:

Three (3) years of experience as Exemptions Technician that includes demonstrated proficiency and mastery in applying a majority of the Property Appraiser's Office most complex and highly specialized exemptions-related technical competencies; or an Associate's degree in computer science, accounting, finance, business, or related field and one (1) year of experience as described above; or an equivalent combination of education, training, and/or experience.

Special Qualifications (May be required depending on area of assignment):

- Florida Driver's License or Florida Commercial Driver's License and endorsement, if any.
- Assignment to work a variety of work schedules including compulsory work periods in special, emergency, and/or disaster situations.
- Assignment to work a variety of work settings, activities, and locations.
- Other knowledge, skills, abilities, and credentials required for a specific position.

Knowledge, Skills and Abilities:

- Knowledge of standard office practices, procedures, and equipment;
- Knowledge of website contents and online application program therein and ability to assist customers with questions and software issues;
- Knowledge of advanced level exemptions rules, policies, case law, and qualification requirements, to include income-based and veterans exemptions;
- Knowledge of Save Our Homes (SOH), Amendment 1, Portability, and other legislative provisions, and the computation of each;
- Knowledge of personal and/or real property appraisal assessment concepts;
- Knowledge of laws, rules, and regulations governing the tax roll;
- Knowledge of Business English, spelling, and punctuation;
- Skill in keyboarding accurately at a reasonable rate of speed;
- Ability to work independently and use good judgment;
- Ability to accurately enter data regarding exemptions maintenance, posting and denial;
- Ability to communicate, orally and in writing, effectively, courteously and tactfully;
- Ability to perform computer data entry and simple word processing functions;
- Ability to recognize potentially fraudulent or improper exemptions and research and prepare cases to forward to Director;
- Ability to handle the most difficult customers without escalating to Director.

PHYSICAL/MENTAL DEMANDS

The work is sedentary work which requires exerting up to 10 pounds of force occasionally and/or negligible amount of force frequently or constantly to lift, carry, push, pull, or otherwise move objects, including the human body. Additionally, the following physical abilities are required:

- Fingering: Picking, pinching, typing, or otherwise working, primarily with fingers rather than with the whole hand as in handling.
- Visual ability: Sufficient to effectively operate office equipment including copier, computer, etc.; and to read and write reports, correspondence, instructions, etc.
- Hearing ability: Sufficient to hold a conversation with other individuals both in person and over a telephone; and to hear recording on transcription device.
- Speaking ability: Sufficient to communicate effectively with other individuals in person and over a telephone.
- Mental acuity: Ability to make rational decisions through sound logic and deductive processes.
- Talking: Expressing or exchanging ideas by means of the spoken word including those activities in which they must convey detailed or important spoken instructions to other workers accurately, loudly, or quickly.
- Repetitive motion: Substantial movements (motions) of the wrist, hands, and/or fingers.

WORKING CONDITIONS

Work is performed in a dynamic environment that requires sensitivity to change and responsiveness to changing goals, priorities, and needs.