



## Exemption & Customer Service Specialist

### JOB SUMMARY

This position performs specialized duties in the processing of homestead and other exemptions.

### MAJOR DUTIES

- Answers telephone and greets visitors; provides information and assistance; takes messages; refers to appropriate personnel; reviews and responds to email correspondence.
- Receives and processes property tax exemption applications and supporting documents; inputs related data to electronic records; reviews for accuracy and completeness.
- Approves or denies exemption requests based on governing rules and regulations.
- Prepares certified denial correspondence.
- Prepares reports for the Value Adjustment Board; sends reports to Property Appraiser during the VAB process.
- Completes property research.
- Maintains accurate and complete records; maintains correspondence and communications records.
- Scans and electronically files images; collects and stores hard copies for shredding; completes records disposition documents.
- Receives and processes real property declarations.
- Reviews trusts and official records to ensure eligibility of exemption applications.
- Provides support for on-line homestead application software.
- Receives and processes port applications.
- Performs related duties.

### KNOWLEDGE REQUIRED BY THE POSITION

- Knowledge of tax exemption requirements and regulations.
- Knowledge of computers and job related software programs.
- Knowledge of appraisal terminology.
- Skill in the analysis of problems and the development and implementation of solutions.
- Skill in the preparation of clear and precise reports.
- Skill in oral and written communication.

### SUPERVISORY CONTROLS

The Chief of Customer Service, Exemptions & Homestead Compliance assigns work in terms of general instructions. The supervisor spot-checks completed work for compliance with procedures, accuracy, and the nature and propriety of the final results.

### GUIDELINES

Guidelines include Florida Statutes, administrative codes, and the Property Appraisers Office Manual. These guidelines are generally clear and specific, but may require some interpretation in application.

### COMPLEXITY/SCOPE OF WORK

- The work consists of related specialized duties. Strict regulations contribute to the complexity of the position.

- The purpose of this position is to provide specialized support for the processing of tax exemption requests. Success in this position contributes to the efficiency of department operations.

#### **CONTACTS**

- Contacts are typically with other county employees, property owners, mortgage companies, title companies, real estate agents, developers, contractors, attorneys, and members of the general public.
- Contacts are typically to provide services; to give or exchange information; to resolve problems; or to justify, defend or negotiate matters.

#### **PHYSICAL DEMANDS/ WORK ENVIRONMENT**

- The work is typically performed while sitting at a desk or table or while intermittently sitting, standing or stooping. The employee occasionally lifts light objects.
- The work is typically performed in an office.

#### **SUPERVISORY AND MANAGEMENT RESPONSIBILITY**

None.

#### **MINIMUM QUALIFICATIONS**

- Ability to read, write and perform mathematical calculations at a level commonly associated with the completion of high school or equivalent.
- Sufficient experience to understand the basic principles relevant to the major duties of the position, usually associated with the completion of an apprenticeship/internship or having had a similar position for one to two years.
- Possession of or ability to readily obtain a valid driver's license issued by the State of Florida for the type of vehicle or equipment operated.
- Possession of or ability to readily obtain "Certified Evaluator" designation through the Florida Department of Revenue.