

PAO EXEMPTIONS SPECIALIST

Job Code	Pay Grade
20672	CL13

Nature of Work

This is 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. Duties include disseminating complex and/or detailed information about all personal or institutional exemptions to the public; data entry of exemptions information resulting from transfers and approved / denied exemptions; preparing and responding to correspondence related to complex exemption issues; and coordinating exemptions related special projects. The incumbent in this class may act as Team Lead in the absence of the director. The incumbent performs independently and/or collaboratively and exercises initiative and judgment in performing a variety of complex tasks related to exemptions. The incumbent may train and lead others in performing a variety of exemptions-related tasks. Candidates will respond to inquiries from the public on the methods, rules, regulations, and practices involved in administering exemptions. Emphasis is placed on technical competency, independence in technical decision making, and professionalism in resolving issues, problems or customer disputes. The incumbent reports to a designated manager, supervisor or designee.

Minimum Qualification Requirements

- 3 years 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
- Associate's degree in computer science, accounting, finance, business, or related field and 1 year experience as described above; or
- An equivalent combination of education, training, and/or experience.

Appointing Authority May Also Require

- 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 in special, emergency and/or disaster situations.
- Assignment to work a variety of work settings, activities, and locations.
- Other highly desirable knowledge, skills, abilities, and credentials relevant to a position.

Illustrative Tasks (These are examples and are 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 can compute the impact of the most complex scenarios.
- Independently gathers information/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 can assist customers through applications and questions, test new releases and assist 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 can assist customers with VAB questions.
- Performs advanced exemptions related research and special projects.

PAO EXEMPTIONS SPECIALIST (continued)

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Knowledge, Skills, and Abilities

- Knowledge of standard office practices, procedures, and equipment.
- Familiar with 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.
- Basic knowledge of personal and/or real property appraisal assessment concepts.
- Basic 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.

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Created	EEOC Code	Overtime Code
2/12	Technicians	Classified