

## **MARTIN COUNTY PROPERTY APPRAISER**

### **JOB TITLE: Customer Service & Exemptions Analyst**

**SUMMARY:** Perform responsible customer service and clerical work in accordance with established office policies, standard operating procedures, and guidelines. In addition, the position processes property tax exemption applications as submitted by property owners and conducts other processing work through various related reports. This position will travel on a rotating schedule to work in all three locations (Main office, Hobe Sound, and Indiantown). The work is reviewed through observation, quality checks and achievement of performance measurements. The position reports to the Customer Service & Exemption Department Manager.

#### **ESSENTIAL DUTIES AND RESPONSIBILITIES:**

- Understands and executes the Property Appraiser's "Mission, Vision and Guiding Principles."
- Assists property owners (in person, telephone, emails, and live chat) in obtaining information from the Property Appraiser's public records including exemptions, ownership, legal descriptions, website data, mapping functions, and free standardized reports.
- Assists property owners in the filing of property tax exemptions and additional benefits (portability) that they may be entitled to receive. Enters personal information into the database, generates application form(s), and processes the required documents according to established procedures.
- Achieves quality control of all exemption applications by creating and running quality control filters in the system.
- Discusses and explains the 3% homestead cap, 10% non-homestead cap, portability provisions, property valuation, comparable sales, methods, and procedures.
- Processes portability applications including Martin County-to-Martin County, other Florida County- to-Martin County applications, and assists with Martin County-to-Other County portability applications.
- Processes the Limited Income Senior and 25-Year Senior Exemptions (creates the renewal data file and letters, prepares mailing, and processes incoming supporting documentation for exemption removal, as necessary).
- Processes monthly advanced Vital Statistics report (removes exemptions, processes appropriate letters, and/or updates data base with appropriate ownership changes).
- Processes the monthly Advanced Sales report (removes exemptions, processes appropriate letters notifying property owners of additional information needed for continuation of exemptions, updates personal information after deed transfer updated by the Ownership Department).
- Follows procedures for homesteaded properties that are transferred into trusts.
- Prepares applications for Declaration of Mobile Homes as real property.
- Assists with exemption compliance work activities (identifies questionable property tax exemptions, conducts basic research, enters, tracks and reports data in the compliance tracking database, and performs quality control for integrity and accuracy).
- Protects property owner information in accordance with Florida Statutes regarding confidentiality.
- Maintains records in proper manner and detail, ensuring the accuracy, completeness, and currency of the data.
- Complies with established procedures, policies, Florida Statutes, and deadlines.
- Other duties as assigned.

#### **OTHER SKILLS AND ABILITIES:**

- Exhibits high level of attention to detail and quality control mindset.
- Actively supports the office-wide initiative of fostering a "lean" atmosphere that focuses on developing a culture of continuous improvement.
- Demonstrates excellent positive listening, oral, and written communication, and customer service skills to consistently represent the Office to all constituents in a manner that exceeds defined standards.
- Demonstrates proficiency in the operation and navigation of a personal computer.

- Establishes and maintains constructive working relationships, team-player attitude.
- Exhibits regular attendance, dependability, and promptness.
- Exhibits ability to work independently, be self-motivated and task oriented.

**PHYSICAL DEMANDS:** The physical demands described here are representative of those that must be met by an individual to successfully perform the essential duties of this job. While performing the duties of this job the individual is frequently required to sit. The individual is regularly required to stand, walk, use hands to finger, handle or feel objects, tools or controls, reach with hands and arms, talk and hear. Specific vision abilities required by this job include close vision, distance vision, peripheral vision, depth perception, and the ability to adjust focus. Occasionally the person may be required to balance, stoop, or lift up to 10 pounds.

This job description is not an employment agreement or contract. Management has the exclusive right to alter this job description at any time without notice.

**PAY RANGE:** \$38,052 - \$57,000 annually

**APPLY:** Daina Takacs  
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