

# LEE COUNTY PROPERTY APPRAISER POSITION DESCRIPTION

## TAX ROLL RECORDS SPECIALIST

**Department:** Tax Roll

**FLSA Class:** Non-exempt

**Reports to:** Tax Roll Administrator

### POSITION OBJECTIVE & SUMMARY

Using documents from various sources, maintains real estate records database to reflect current data affecting the ownership, legal description, assessment and exemptions of property.

### ESSENTIAL FUNCTIONS & RESPONSIBILITIES

- Reviews, researches and interprets several types of recorded documents (deeds, trusts, probate, certificate/shares, etc.) and unrecorded documents that affect ownership, value, and exemptions.
- Reviews, researches and confirms various information and characteristics of residential ownership transfers (sales).
- Contacts title companies, engineers, and taxpayers to obtain and clarify information.
- Updates and maintains parcel ownership data for tax roll submission.
- Assists with daily coding of sales and ownership transfers using real property transfer qualification codes published by Florida Department of Revenue.
- Processes confidentiality requests.
- Prepares the Declaration of Mobile Home as Real Property (DR-402).
- Provides basic assistance and information to customers; responds to routine questions/complaints; researches problems and initiates problem resolution.
- Communicates effectively and professionally, verbally and in writing, with management, colleagues and the general public.

### COMPETENCIES: KNOWLEDGE, SKILLS & ABILITIES

- Knowledge of the relationship between ownership transfers (sales) to real property valuation and exemptions
- Knowledge of the assessment calendar including key dates that affect office deadlines and processes
- Knowledge of Florida Statutes, Administrative Code and DOR guidelines as they relate to property ownership transfers (sales).
- Skill in the use of Microsoft Office products (Word, Excel & Outlook) and Adobe Acrobat.
- Ability to interpret recorded or unrecorded documents that affect chain of title.
- Ability to effectively communicate and present information, orally and in writing, and respond to questions from managers, colleagues, outside professional representatives, and the general public
- Ability to establish and maintain professional working relationships with management, colleagues, and the general public.
- Ability to perform detail-oriented tasks in a high volume work environment.
- Ability to follow verbal and written instruction and work independently on assigned tasks.
- Ability to operate standard office equipment such as computer, copy machine, fax machine, and calculator.

### EDUCATION / EXPERIENCE / LICENSING

Graduation from high school or GED equivalent. Minimum (1) one year experience in assessment, real estate sales, title research or land development preferred; or applicable training and experience which provides the required knowledge, skills and abilities to successfully perform the essential functions of the job. Attainment of Certified Florida Evaluator (CFE) designation encouraged.

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**WORK ENVIRONMENT & PHYSICAL DEMANDS**

The work is performed in an office setting with prolonged periods of sitting and some standing, bending, stooping, squatting, and/or reaching. Specific vision abilities required by this job include attention to a computer monitor for approximately 95% of the work day. Periodic exposure to outdoor environmental conditions, and driving county vehicle, while performing field work. The employee may occasionally be required to lift up to 25 pounds.

**OTHER DUTIES**

This position description does not constitute an employment agreement between the employer and employee. The listed job specifications should not be construed as a comprehensive listing of activities, duties or responsibilities that are required of the incumbent. Duties are subject to change at any time as the needs of the employer and requirements of the job change.

**Date: April 5, 2016**