Centralized Document Processing and Support Manager

Job Purpose: To oversee the day-to-day processing workflow of Centralized Document Processing in order to assist lending officers and loan assistants with document preparation. In addition, provides oversight and guidance to commercial relationship assistants in their day-to-day job duties.

Department: Commercial Lending

Reports to: EVP, Chief Credit Officer

Exemption Status: Exempt

Essential Duties/Responsibilities:

➢ Responsible for hiring, coaching, developing and supervising CDP staff and all other commercial support staff
  o Oversees on-the-job training, guidance and coaching to new and existing staff
  o Completes performance reviews
  o Engages team to take ownership of achieving personal and departmental goals
  o Manages difficult employee and/or customer situations
  o Facilitates regular team meetings
  o Provides reward, recognition and/or discipline as appropriate

➢ Oversees and monitors the daily processing pipeline within Centralized Document Processing
  o Serves as the initial contact person for processing staff to respond to questions and guide workflow
  o Assigns loans to processors based upon priority code and deadline
  o Ensures workload is evenly distributed with a focus on accuracy and timely turnaround
  o Clarifies issues related to procedures, systems, and required documents
  o Ensures loan processors achieve productivity objectives and customer service levels
  o Maintains pipeline calendar and notifies management of issues with staffing and deadlines
  o Prepares periodic reports

➢ Acts as a liaison between lending officers, commercial relationship assistants, loan administration and other CDP processors
  o Provides lending officers and commercial relationship assistants with timely and periodic status updates on processing of loan documentation

➢ Serves as the primary contact with the document processing vendor as it relates to document preparation, problem resolution, etc.

➢ Prepares and maintains policies and procedures as related to all aspects of loan processing in accordance to all regulatory requirements

➢ Assists with the completion of administrative duties within the department
  o Backs up the preparation and review of new and renewal loan documentation when workload requires

➢ Performs additional job related duties as assigned or required
Equipment/Software Operating Requirements:

- Core Bank Software
- Lending Origination/Underwriting /Document Preparation Software
- Imaging Software
- Windows based PC (MS Word/Excel/Power Point/Outlook)

Interpersonal/Mental Requirements:

- Have the ability to acquire knowledge of and to adhere to various bank policies and government regulations/laws that pertain to lending (including, but not limited to, Bank Secrecy Act, AML, OFAC, CIP, RESPA, Fair Lending, Americans with Disabilities Act, Right to Financial Privacy Act, Gramm-Leach-Bliley Act, etc.)
- Follow the Guaranty Bank Code of Conduct and other related policies and regulations, maintaining integrity, honesty and utmost ethical standards at all times.
- Interact and communicate effectively with various types of external and internal customers (by telephone and in person).
- Excellent written and verbal communication skills.
- Upholds confidentiality and customer privacy at all times.
- Detail oriented to review information and documents for accuracy.
- Ability to handle high volume, prioritize, and function effectively to meet deadlines in a fast paced environment.
- Flexibility to withstand unpredictable changes to schedules and deadlines.

Working Conditions/Physical Requirement:

Duties are performed primarily in an office environment in a professional business setting. Requires the ability to sit at a desk and work at a computer terminal for extended time periods and lift and carry general office supplies of up to 50 lbs.

Eligibility Requirements (Minimum Qualifications):

Previous banking/financial industry experience with a minimum of five or more years’ loan processor or loan assistance experience including documentation preparation is mandatory. In addition, a minimum of five or more years of supervisory experience is required. High school diploma or equivalent is required. College courses/technical training related to Business, Finance/Accounting, Legal, or related field is preferred.