

# S

Stewardship

be accountable for the well-being of Team Members, Shareholders - in service, rather than control.

# E

Empathy

To understand and be sensitive to the feelings and emotions of others.



## POSITION DESCRIPTION

We get stuff done (SAD).

# V

Vision

The courage and ability to do the impossible while having fun along the way.

# E

Empowerment

Empower those around you. When what you attempt to make those around you better than you.

**TITLE:** Synergy Document Specialist

**CATEGORY:** Full Time

**FLSA:** Non-Exempt

**LOCATION:** GSD

**SEGMENT:** Deposit and Loans

**REPORTS TO:** Synergy Manager

**SHIFT:** Monday-Friday; 8:00 a.m. - 5:00 p.m.

**DATE:** November 3, 2020

### SUMMARY

The position of the Synergy Document Specialist will be responsible for scanning, reviewing and verifying all new account and loan documentation, scanning miscellaneous deposit and loan document related items, and handling of emails and calls in a timely matter. You will also be required to work out of Synergy and Xperience.

Assures compliance with all Bank policies and procedures, as well as all applicable state and federal banking regulations.

### ESSENTIAL DUTIES

- Review collected new account documentation.
- Scan miscellaneous document related items.
- Communicate exceptions to deposit and loan staff.
- Provide document support to staff.
- Operates Silverlake CORE and Synergy system.
- Answers the telephone and responds to routine inquiries.
- Additional duties may be assigned, depending on need.

- Treats people with respect; keeps commitments; Inspires the trust of others; works ethically and with integrity; upholds organizational values; accepts responsibility for own actions.
- Demonstrates knowledge of and adherence to EEO policy; shows respect and sensitivity for cultural differences; educates others on the value of diversity; promotes working environment free of harassment of any type; builds a diverse workforce and supports affirmative action.
- Follows policies and procedures; completes administrative tasks correctly and on time; supports the Bank's goals and values; benefits the bank through outside activities.
- Performs the position safely, without endangering the health or safety to themselves or others and will be expected to report potentially unsafe conditions. The employee shall comply with occupational safety and health standards and all rules, regulations and orders issued pursuant to the OSHA Act of 1970, which are applicable to one's own actions and conduct.

### **COMPETENCIES**

- Time Management
- Thoroughness
- Technical Capacity
- Teamwork Orientation
- Communication

### **SECONDARY DUTIES**

The position of Synergy Document Specialist performs duties specific to the position and other functions as assigned.

### **SUPERVISOR RESPONSIBILITY**

The position of Synergy Document Specialist is not responsible for the supervision of any employee(s).

### **ENVIRONMENT AND PHYSICAL ACTIVITY**

The incumbent is in a non-confined office-type setting in which he or she is free to move about at will. It may include some minor annoyances such as noise, odors, drafts, etc.

The incumbent in the course of performing this position spends time writing, typing, speaking, listening, lifting (up to 10-20 pounds), driving, carrying, seeing (such as close, color and peripheral vision, depth perception and adjusted focus), sitting, pulling, walking, standing, squatting, kneeling and reaching.

The incumbent for this position may operate any or all of the following: telephone, cellular telephone, beeper, copy and fax machines, adding machine (calculator), check protector, microfilm equipment, encoder, money counter, credit card terminal, typewriter, computer terminal, personal computer and related printers.

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job.

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

## MENTAL DEMANDS

The incumbent in this position must be able to accommodate to reading documents or instruments, detailed work, problem solving, customer contact, reasoning, math, language, presentations, verbal and written communication, analytical reasoning, stress, multiple concurrent tasks, and constant interruptions.

## MINIMUM REQUIREMENTS

These specifications are general guidelines based on the minimum experience normally considered essential to the satisfactory performance of this position. The requirements listed below are representative of the knowledge, skill and/or ability required to perform the position in a satisfactory manner. Individual abilities may result in some deviation from these guidelines.

- High school diploma or general education degree (GED), and **6+** months of related experience and/or training; or the equivalent combination of education and experience. Work related experience should consist of a financial institution operations, sales, or customer service background. Educational experience, through in-house training sessions, formal school, or financial industry related curriculum, should be business or financial industry related.
- Basic experience, knowledge and training in deposit or loan activities, terminology, and products and services.
- Basic knowledge of related state and federal banking compliance regulations, and other Bank operational policies.
- Basic skills in personal computer operation, Banks CORE system, Word Processing, Excel, and specialty software programs.
- Basic typing skills to meet production needs of the position.
- Basic knowledge of general office practices.
- Basic math skills; calculate interest and balance accounts; add, subtract, multiply and divide in all units of measure, using whole numbers, common fractions and decimals; locate routine mathematical errors; count currency, coin and negotiable instruments in a timely manner.
- Effective oral, written and interpersonal communication skills with the ability to apply common sense to carry out instructions, interpret documents, understand procedures, write reports and correspondence, and speak clearly to customers and employees.
- Ability to deal with routine problems involving multiple facets and variables in non-standardized situations.
- Effective organizational and time management skills.
- Ability to work with general supervision while performing duties.
- Current **STATE** driver's license and a vehicle with appropriate insurance coverage if required to drive in the course of performing assigned duties and responsibilities.

**Management reserves the right to change this position description at any time according to business needs.**

