

**VERABANK**  
**JOB DESCRIPTION**

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**JOB TITLE:** **Documentation Clerk**

**DEPARTMENT:** **Note**

**INCUMBENT:**

**SUPERVISOR:** **Loan Servicing Manager**

**FLSA STATUS:** **Non-Exempt**

**DATE:**

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**JOB PURPOSE**

Responsible for verifying data entry to ensure loan records are accurately recorded on loan system. Verifies all loan documents for completeness and accuracy.

**DUTIES AND RESPONSIBILITIES**

1. Verifies documentation required on loans and verifies loans are recorded accurately on loan systems.
2. Performs other clerical duties, such as skip tracing, credit references, quoting payoffs, verifying loan advance sheets, paid off vehicles, checking for cross-pledged loans and charge-offs.
3. Enter new consumer and commercial loans, new mortgage loans, and renewed ELS and mortgage loans on tickler from report manager.
4. Process and review payment extensions, change in payment due date, change in collateral, and change in interest rate have been updated on Horizon and added to tickler.
5. Make corrections to unposted items from Horizon and Complete checkfree transactions.
6. Process payment due notices and past due notices.
7. Process exceptions that come thru the mailbag and note inbox.
8. Update and delete credit reporting thru Eoscar and CRAs.
9. Check in loans that come in thru the mail bag.
10. Provides professional, efficient customer service.

**CONTACTS**

Daily contact with supervisor and co-workers. Frequent contact with bank supervisors and customers.

## **SPECIFIC REQUIREMENTS**

1. High school diploma or equivalent experience.
2. General knowledge of accounting and general ledger.
3. Detail oriented.
4. Excellent oral and written communication skills.
5. Excellent customer service skills.

## **PREFERRED REQUIREMENTS**

1. One to two-year experience in loan department functions.
2. Familiar with loan servicing and bank regulations related to loans.
3. Knowledge of loan support software and systems.
4. Familiar with the bank's core accounting system.
5. Knowledge of personal computer and related word processing and spreadsheet software.
6. Knowledge of various banking departments.
7. Ability to work independently and as a team with excellent time management skills.

## **PHYSICAL REQUIREMENTS**

Office setting with moderately varied desk-oriented activity, with fatigue being relieved by opportunities to stand and move around in a comfortable environment.

## **NOTICE**

1. This job description in no way states or implies that these are the only tasks to be performed by the incumbent occupying this position. The incumbent will be required to follow any other instructions and to perform any other job-related duties.
2. Requirements are representative of minimum levels of knowledge, skills, and/or abilities. To perform in this position successfully, the incumbent will possess the abilities and aptitudes to perform each task proficiently.
3. Ability means to possess and apply both knowledge and skill.
4. This position description has excluded the marginal or peripheral functions that are incidental to the performance of primary functions. All requirements are essential to the function of the position.
5. This job description describes the minimum selection requirements to qualify for the position. However, promotion and other employment decisions are also based on Bank needs, being in good standing, fully competent performance, and other non-discriminatory issues.
6. All requirements are subject to possible modification to reasonably accommodate individuals with disabilities.
7. Some requirements may exclude individuals who pose a direct threat or significant risk to the health and safety of themselves or other employees.
8. This position description does not create an employment contract, implied or otherwise, other than an "at will" employment relationship.

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Employee

Department/Division Manager

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Date

Date