



## Job Description Form

<b>Job Title</b>	Originations Agent	<b>Location</b>	Upper Lake, CA
<b>Department</b>	Batch	<b>Supervisory Role</b>	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes
<b>Reports to</b>	Manager-Batch Processing	<b>Entity</b>	TLE
<b>Salary range</b>		<b>Position Type</b>	Full-time
<b>Hay Level/Grade</b>	Choose a level/grade.	<b>Travel Required</b>	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes ___%
<b>Summary</b>	The Originations Agent is responsible for originating loans for Upper Lake Processing Center.		
<b>Essential Functions</b>	<ol style="list-style-type: none"> <li>1. Evaluates loan applications and documentation for accuracy.</li> <li>2. Approve or reject loans based on underwriting rules.</li> <li>3. Recognize any trends or repetitive information on applications.</li> <li>4. Maintains customer confidence by keeping loan information confidential.</li> <li>5. Successful achievement of minimum monthly individual and team goals set by department (e.g. quality and productivity)</li> <li>6. Contributes to team effort by accomplishing related results as needed.</li> <li>7. Committed to meeting quality standards in processing customer's application</li> </ol>		
<b>Education</b>	<ul style="list-style-type: none"> <li>• Associate's Degree preferred or equivalent work experience of 2 years.</li> </ul>		
<b>Required Skills</b>	<ul style="list-style-type: none"> <li>• A minimum of 2 years of experience in customer service, preferably in a call center environment.</li> <li>• Excellent oral and written communication skills with attention to detail.</li> <li>• Ability to sit for long periods of time and perform repetitive actions, 2-3 hours at a time</li> <li>• Working knowledge of Microsoft Excel, Word, and Outlook Applications.</li> <li>• Ability to navigate standard Windows applications.</li> <li>• Ability to follow underwriting guidelines, protocol, policies, and procedures.</li> <li>• Ability to perform basic math skills.</li> <li>• Awareness to escalate issues as needed.</li> <li>• Acts with integrity, maintains confidentiality, interacts with others professionally and respectfully, promotes harmony in the workplace.</li> </ul>		
<b>Preferred Skills</b>			
<b>Additional Notes</b>	<ul style="list-style-type: none"> <li>• Must pass all required back-ground and drug screening and aptitude testing.</li> </ul>		
Reviewed By:	Debbie Guess	Date:	5/24/18
Approved By:	Name	Date:	Date