

ELECTRONIC DOCUMENT SPECIALIST

Job Description



DEPARTMENT: Operations

REPORTS TO: AVP, Electronic Document Manager

POSITION SUMMARY

Manages electronic documents and records for the bank. Helps to implement and administer electronic document management system and related policies and procedures that allow the bank to create, standardize, store, retrieve, share, approve and manage electronic documents and records. Prepares paper documents for electronic scanning, operates document imaging equipment, scans documents, checks quality and enters index information for document images retrieval. Actively cooperates and interacts with other departments to advance the overall interests of the bank. Maintains educational and professional expertise through attendance at job related seminars, trainings, conferences and workshops. Assists other operational support areas in the completion of their duties in times of unusual activity. Contributes to the effort of the Bank by performing other duties as assigned.

ESSENTIAL DUTIES & RESPONSIBILITIES

Electronic Documents Management:

- Establishes and implements policies and procedures regarding electronic document storage, sharing, transmission and destruction.
- Evaluates existing electronic document systems and procedures to determine current effectiveness and efficiency and identifies and recommends improvements.
- Ensures security of system and integrity of master documents by implementing document and system access rights and revision controls.
- Ensures the bank complies with all applicable laws and regulations regarding data security and electronic document management.
- Communicates and consults with other staff when assessing, acquiring, or deploying new electronic document management systems to ensure smooth transition and minimal disruptions.
- Suggests electronic documents formats and storage methods.
- Consults with end users to identify any potential problems in accessing electronic documents.
- Administers electronic signature systems.
- Works closely with departmental units throughout the bank to train and answer questions on electronic signature and imaging platforms.
- Manages new project initiatives regarding electronic signatures and electronic documents.

Scanning:

- Scans and converts various hard copy documents into electronic images to the core system by selecting the location and naming and exporting the documents consistently.
- Prepares documents for scanning which may include removal of staples and/or paperclips and ensuring they are in the proper condition to be electronically scanned.
- Indexes documents accurately into the system and maps indexes.
- Verifies and reviews scanned images came over clearly.

- Counts pages processed.
- Verifies and quality controls processed images for accuracy in the core system.
- Properly manages original paper documents after scanned, verified and indexed.

OTHER FUNCTIONS

- Maintains compliance with all banking laws, acts, regulations and bank policies and procedures.
- Any other duties and/or projects as assigned by management.

REQUIREMENTS & QUALIFICATIONS

- Education/Specialized License(s): Minimum of Associates Degree preferred.
- Experience: 2-3 years operations, banking, document management, document scanning or electronic recordkeeping experience.
- Specific Skills: High attention to detail; proficient computer skills including Microsoft Excel and Microsoft Word proficiency; possess technical skills to operate and troubleshoot office equipment including scanners and copiers; Ability to scan a document up and down or left to right while eyes are fixed at a given point; Excellent verbal and written communication skills; exceptional organizational skills;
- Supervisory Responsibility: None.
- Working Conditions: Monday-Friday 8:00am to 5:00pm including some Saturday's with additional hours required as necessary or assigned; may be required to stand for long periods of time; may be required to lift and carry boxes of files that weigh up to 40 pounds.

Employee Name (Print):

Employee Signature:

Date: