



POSITION DESCRIPTION

TITLE:	Sageworks Administrative Assistant	CATEGORY:	Full-Time
FLSA:	Non-Exempt	LOCATION:	Any Location
SEGMENT:	Loan Operations	REPORTS TO:	VP, Sageworks Administrator
SHIFT:	Monday-Friday: 8:00 a.m.-5:00 p.m.	DATE:	July 31, 2024

SUMMARY

The position of Sageworks Administrative Assistant (Credit Department) is primarily responsible for maintaining and customizing Sageworks, which is the Bank's Loan Origination System (LOS). Every loan underwritten and booked at OakStar Bank is ran through the Sageworks platform. This position will ensure Sageworks is working as intended for our OakStar Bank lending team.

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

ESSENTIAL DUTIES

- Ensure Sageworks is working properly and as intended every day for our lending team.
- Will troubleshoot any issues with daily integration as required.
- Work daily with and will report directly to the Sageworks Administrator.
- Assist our IT Department in establishing new users within the platform and assist with converting terminated or transferred team members to non-users within the platform as requested through internal ProcessMaker system.
- Will assist with training new users and will assist with training on the use of any new Sageworks process or procedure within Sageworks.
- Will work closely with our lending teams, compliance team, audit team and other internal departments to ensure that the processes, procedures, workflows, templates, etc, within Sageworks work to the best of their ability for all team members involved.
- Will assist our internal training department with training videos and other training materials as required.
- May work on special projects as presented as OakStar Bank changes internal procedures, requiring modifications to our LOS, Sageworks.
- Will work as a team with other OakStar Bank team members, creating ideas or new improved processes to constantly maintain the efficiencies that Sageworks provides.
- Sageworks modules or enhances the platform and requests the testing or input from an OakStar Bank Sageworks Administrator.

- May attend the annual Abrigo user conference as a representative of OakStar Bank.
- Treats people with respect, keeps commitments, Inspires the trust of others, works ethically and with integrity, upholds organizational values, and 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, and 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, and 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.

SECONDARY DUTIES

The position of Sageworks Administrative Assistant performs duties specific to the position and other functions as assigned.

SUPERVISOR RESPONSIBILITY

The position of Sageworks Administrative Assistant 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 a Bachelor's degree (BA) or equivalent from a four-year accredited college or university; **5+** years related banking experience and/or the equivalent combination of education and experience. Banking related experience should consist of lending or loan processing, loan underwriting or credit analysis, loan review, loan administration or compliance. Educational experience, through in-house training sessions, formal school, or financial industry related curriculum, should be financial industry related.
- Basic experience of loan underwriting, loan documentation or loan processing.
- Basic experience, knowledge and training in all lending activities and financial analysis terminology.
- Above average knowledge of commercial, construction, real estate, and consumer loan underwriting.
- General knowledge of related state and federal lending and compliance regulations, and other Bank lending policies.
- Basic knowledge of branch operation procedures, Bank products and services.
- Ability to read, analyze and interpret general business periodicals, professional journals, and technical procedures.
- Excellent organizational and time management skills.
- Above average skills in personal computer operation, spreadsheet, and specialty software programs.
- Intermediate typing skills to meet production needs of the position.
- Exceptional verbal, written and interpersonal communication skills with the ability to apply common sense to carry out instructions and instruct others, train personnel, write reports, correspondence, and procedures, speak clearly to team members.
- Ability to deal with complex problems involving multiple facets and variables in non-standardized situations.
- 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 while performing assigned duties and responsibilities.

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

