



## **Operations Processor I**

### **Job Brief**

At ClearPoint, you are given the opportunity to do meaningful work aligned with your strengths, in an environment where you have a voice, are encouraged to collaborate with others, and ultimately have the chance to create your own career path.

This is a cross trained, cross-functional position that provides production support to multiple groups in providing exceptional customer service to our customers and the families they serve. In this role, you execute a variety of standardized tasks within multiple operational systems, such as functions related to transaction processing, data entry, archiving, researching and client interaction over the phone or email. You will research abnormalities and be empowered to resolve reconciliation items. You will have the opportunity to recommend, test and implement process improvements. As a cross trained member of the Operations team, you may need to pivot to support ops processing as determined by resourcing levels, demand and SLA's. You will need to be comfortable in shifting gears and switching up work quickly. Based in our Batesville, Indiana office, you will work closely with members of the ClearPoint team.

### **RESPONSIBILITIES:**

- Perform daily operations functions including new business entry, payment posting, payment of distributions, contract service processing, reconciliation of outstanding cash items, customer service support and daily balancing.
- Accurately enter data into various trust and recordkeeping systems after thoroughly reviewing documents for completeness and accuracy.
- Research and resolve personal processing errors from internal control documents.
- Follow up and resolve any issues such as missing information, incomplete, and inaccurate information in documents.
- Performs daily to help the team meet its quality and responsiveness measures.
- Assist with testing for production enhancements, creating and maintaining standard operating procedures for operational processes.
- Contribute to the team's performance by addressing barriers and generating alternative solutions to meet or exceed team goals.
- Maintain behaviors consistent with high performance and supportive team dynamics.
- Assist on team projects and additional duties as determined based on business needs.
- Assures comprehensive knowledge and compliance with all Bank policies, procedures, products and support systems and all applicable state and federal banking laws, rules, and regulations.

### **REQUIREMENTS:**

- Strong attention to detail and accuracy combined with the ability to quickly comprehend new topics
- Demonstrate effective communications skills with internal and external customers
- Demonstrated computer proficiency, particularly in the use Microsoft Office, Excel and Word
- Work respectfully with all team members in a collaborative environment
- Be willing to learn new skills, adapt to changing work priorities and shift focus as needed
- High school degree or equivalent; post-secondary education a plus
- One to two years of related work experience; prior banking, preneed or trust experience preferred