



Job Description – Escrow Assistant I

January 1, 2013

Level of Responsibility and Authority:

Function:	Escrow Assistant
Department:	Escrow Unit
Reports to:	Unit Manager
Job status:	Non-Exempt

SUMMARY:

3 main functions for an Escrow Assistant I

- **Escrow processing**
 - Escrow Assistant I is responsible for the processing of his/her unit’s escrow files under the guidelines established by the Unit Manager, Viva Escrow and Escrow Law
- **Customer service**
 - Provide customer services during office hours (M – F: 8:30am - 5:30pm)
- **Training and development**
 - Self

ESSENTIAL DUTIES AND RESPONSIBILITIES:

- **Escrow processing**

An Escrow Assistant I job responsibility is to process escrow files under the guidance and with instructions from the Unit Manager and under state and federal escrow law and company policies and pursuant to instructions given by the parties. These may include, but are not limited, to the following:

 - Receive funds under the guidance of the Unit Manager and ensure that they are deposited and credited to the correct party according to the instructions given.
 - Receive and process escrow paperwork under the guidance of the Unit Manager.
 - Bring to Unit Managers attention any matters of potential conflict or problems that they might encounter in the processing of the files.
 - Provide open and clear communication with all parties to ensure a smooth closure.
 - Ensure that proper attention is given to all instructions given by Unit Manager, work priorities balanced
 - Maintain order of the escrow file according to Unit Manager and Viva Escrow’s guidelines for easy access and easy auditing purpose.
 - Maintain confidentiality of all customer and/or company related information
- **Customer service**
 - Provide customer services if called on during office hours (M – F: 8:30am - 5:30pm)
 - Return phone calls/emails within 24 hours (the next business day)

- Professionalism at all times, over the phone, through written communication (emails, letters), in the office, and any time you are actively representing yourself as an employee of Viva Escrow.
 - Professional appearance and dress code – hair, makeup, shoes, accessories, dress appropriately for business/office environment.
 - Professional demeanor and attitude – body language, handshakes, eye contact, tone of voice, smile, and dignified appearance.
 - Professional language – no cuss words.
- Professional work area - clean, orderly work environment and filing system. Appearance of general office area as well as your specific work area is important for clients' perception. Clients equate the appearance of your physical files and your work area to you and the appearance of the general office to the company.
- **Training and development**
 - Keep up with ever changing escrow laws, software tools, workflow process by:
 - Participating in the company's meetings, training and workshops.
 - Participating actively in the local escrow association's meetings, training and workshops.
 - Pursuing escrow industry certificates such as Certified Escrow Technician (CET).

QUALIFICATIONS:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skills and abilities required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- **Education and/or Experience:**
 - High school diploma or equivalent (GED) required; some college preferred; or equivalent combination of education and experience.
 - Minimum one or more years of solid escrow knowledge and working experience required.
- **Skills and Abilities:**
 - **Skills required**
 - Escrow processing skills shall be taught on the job
 - Adequate face to face, verbal (phone) and written (email, fax) English communication skills
 - Treat others with respect and courtesy
 - Basic Math skills
 - Organizing skills
 - Organize work environment, escrow files
 - Time management skills
 - Arrive at work on time
 - Scheduling of work to be done
 - Attention to details skills
 - Multi-tasking skills
 - Computer skills (basic Windows navigation, Outlook)

- Office equipment usage skills (copying, printing, scanning, faxing)
- **Abilities required**
 - Background must be approved by the Department of Corporations and the Escrow Agents Fidelity Company
 - Ability to follow company policies and guidelines
 - Ability to learn and keep current on escrow related software and hardware tools
 - Ability to be flexible in working in a dynamic and sometimes stressful work environment
 - Ability to work well under pressure

PHYSICAL REQUIREMENTS:

- The physical requirements 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.
- While performing the duties of this job, the employee is regularly required to sit; use hands and finger, handle, or feel; reach with hands and arms; talk or hear; the employee is occasionally required to stand, walk, stoop, kneel, crouch, or crawl. The employee must occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision, color vision, peripheral vision and ability to adjust focus.

WORK ENVIRONMENT:

- The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.
- The noise level in the work environment is usually moderate. While performing the duties of this job, the employee occasionally is exposed to risk of electrical shock.