JOB DESCRIPTION
Loan System Administrator (I)

Department	Information Technology
Reports to	Manager, Information Technology
Supervises	N/A

Job Summary

Under limited supervision, coordinates and performs the administration, configuration, support, integration, testing, and maintenance of the credit union's lending systems and related interfaces. Partners with Consumer and Commercial Lending, Loan Administration, vendors, and other business units to improve system reliability, data quality, workflow efficiency, regulatory readiness, and the member and employee experience. Coordinates activities in support of organizational strategic goals and objectives.

Essential Functions

- Administers, configures, and supports lending platforms, including Baker Hill NextGen, MortgageBot, LaserPro, Kinective Lending Bridge, and other loan origination, documentation, decisioning, integration, reporting, servicing-related systems, CUDL, Dealertrack, Lending 360, DocMagic, ImageFlow, OnBase lending workflows, and future lending systems as assigned.
- Maintains system configuration, user access, roles, permissions, lookup tables, product types, opportunity types, workflow stages, templates, rules, queues, notifications, and other administrative settings.
- Partners with Lending and Loan Administration subject-matter experts to translate lending policies, procedures, product requirements, and operational needs into appropriate system configuration and workflow design.
- Supports system integrations and data flow among lending platforms, Corelation Keystone, document preparation and imaging systems, e-signature tools, credit reporting services, appraisal systems, and other third-party services.

- Reviews and maintains field mappings, import/export files, interface specifications, business rules, and data validation requirements to reduce duplicate entry and improve data quality.
- Coordinates testing of system changes, new releases, vendor updates, product changes, interfaces, and configuration changes in test or sandbox environments before production implementation.
- Develops and maintains documented test plans, test cases, validation results, implementation steps, rollback considerations, and user acceptance sign-off.
- Reviews vendor release notes and product roadmaps; identifies applicable features, configuration requirements, operational impacts, security considerations, and training needs.
- Coordinates release management activities with Lending, Information Technology, Information Security, Project Management, Compliance, and vendors.
- Investigates and resolves system issues involving user access, workflows, forms, documents, calculations, interfaces, reports, queries, data mapping, and application performance.
- Serves as the primary technical liaison with lending system vendors; opens and manages support cases, documents findings, tracks resolution, and escalates issues as appropriate.
- Creates and maintains queries, reports, dashboards, extracts, and operational monitoring needed to support loan production, pipeline management, exceptions, portfolio administration, and management reporting.
- Works with business owners to configure and maintain credit memo templates, document packages, disclosures, tracking items, covenants, checklists, and automated notices.
- Monitors scheduled jobs, interfaces, file transfers, alerts, and vendor notifications; coordinates timely response to failures or processing exceptions.
- Maintains accurate system inventories, , licensing information, configuration documentation, data-flow diagrams, procedures, and recovery information.
- Assists with vendor due diligence, access reviews, audit requests, business continuity planning, disaster recovery testing, security reviews, and regulatory examinations related to lending systems.
- Protects confidential member and loan information and follows established information security, privacy, change management, and records-retention requirements.
- Identifies opportunities to simplify lending processes, increase automation, improve system utilization, and reduce operational risk or manual work.
- Serves as a consultant and information resource to users; provides system guidance, documentation, and training to lending employees and technical support staff.
- Assists the Service Desk with lending application issues and escalated problems as needed.
- Travels to Member Service Branches and department locations as needed to support installed systems, training, testing, or process improvement.
- Attends out-of-area training and seminars, requiring overnight stays, as appropriate.

- Able to work flexible hours, including nights, weekends, and holidays, as assigned for implementations, upgrades, testing, or issue resolution.
- Performs other duties as assigned.

Required Knowledge, Skills, and Abilities

- Knowledge of lending processes and the loan lifecycle, including application, underwriting, approval, documentation, closing, booking, servicing, exception tracking, and records retention.
- Ability to understand consumer, mortgage, and business lending workflows and translate business requirements into system configuration, testing, and support activities.
- Working knowledge of loan origination systems, loan documentation platforms, workflow tools, data interfaces, reporting tools, and document management systems.
- Ability to analyze data mapping, field definitions, calculations, product configuration, business rules, and system integrations across multiple platforms.
- Knowledge of change management, release management, user access administration, testing practices, issue tracking, and technical documentation.
- Ability to organize competing priorities, coordinate work across departments and vendors, and follow issues through resolution.
- As a direct contact person working closely with all levels of personnel, applicants, and outside vendors, must demonstrate excellent interpersonal skills and communicate effectively, verbally and in writing, with tact and professionalism.
- Understands and accurately responds to complex verbal and written communications with clear and accurate verbal and written responses.
- Reads and comprehends lending, technology, security, and vendor manuals, instructions, correspondence, release notes, and online documentation.
- Creates and edits system documentation, procedures, training materials, data maps, and support records that are understandable, grammatical, and technically accurate.
- Exercises sound judgment, analytical ability, attention to detail, and discretion when working with confidential member and loan information.
- Demonstrates a willingness and enthusiasm for learning, collaboration, and self-development.

Education and Experience

- Requires a college degree in Information Systems, Business, Finance, Lending, or a related field, or a combination of 2 to 4 years' equivalent experience and relevant training or certifications.

- Knowledge of lending processes and demonstrated experience supporting lending operations, loan systems, financial applications, or related business systems is preferred.
- Experience administering or supporting one or more lending platforms such as Baker Hill, MortgageBot, LaserPro, Kinective, CUDL, Dealertrack, Lending 360, Calyx Point, DocMagic, ImageFlow, or similar systems is preferred.

Additional Requirements

- Incumbent must be bondable.

Physical Demands

- This is a moderately sedentary office classification although standing and walking between work areas is required. Individual(s) in this class must possess the mobility to work in a standard office setting and use standard office equipment, including a computer; visual acuity to read printed materials and a computer screen; and hearing and speech to communicate in person, before groups, and over the telephone. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator at a reasonable speed, and to operate standard office equipment. Person(s) in this classification occasionally bends, stoops, kneels, reaches, climbs, and walks; and pushes and pulls drawers open and closed to retrieve and file information. Employee must possess the ability to lift, carry, push, and pull materials and objects weighing up to 10 pounds regularly, and up to 50 pounds occasionally. Works in an office environment with moderate noise levels.