

JOB TITLE		
Job Title: Case Handler	Level:	Team: Remortgage Team

REPORTING RELATIONSHIPS	
Responsible to	Team Leader
Other reporting line	Human Resources Manager
Responsible for (number of subordinates)	None

MAIN PURPOSE OF JOB
<ol style="list-style-type: none"> 1. Processing of remortgage cases from Instruction to completion 2. 9am to 5pm Monday to Friday (standard hours) or other as appropriate 3. Using Visual files software package 4. Utilisation of agreed services and systems from third party suppliers as required such as Call Credit, Title Solve and HMLR. 5. With one or more of the following teams RBSG and Private Remortgage

KEY POINT AREAS
<ol style="list-style-type: none"> 1. To process all remortgages within the Brand SLA guidelines 2. Process of received documents / letters 3. Collating documents for file preparation, set up and checking. 4. Continual updating of Visualfiles Database 5. Updating of Brand software package where applicable 6. Production of legal documents to Client / Customer 7. Production of additional letters pertaining to instruction. 8. Preparing file pre and post completion 9. Managing pipeline by advancing cases, chasing outstanding documents, abandoning non-active cases

KNOWLEDGE, SKILLS AND EXPERIENCE
<ol style="list-style-type: none"> 1. Telephony work 2. Team working 3. Customer focused experience 4. Computer Skills– Word, Excel, Case Management Systems 5. Time management 6. File management 7. Flexibility



CONTEXT OF ROLE

1. Maintaining a case load of up to or exceeding 300 files
2. Excellent customer service
3. Bonuses based on achieved targets

COMPLEXITY AND ESSENTIALS OF ROLE

1. Professional attitude to all cases.
2. Assist with all client cases where required
3. Use knowledge to assist others
4. Clients include Volume introducers RBSG and Private Client.
5. Resolving client, broker or customer query by telephone, letter, and email as required.
6. Team targets to be achieved together with individual targets
7. Complete call backs within 24hrs of request
8. Flexibility to work within, move to or assist other teams as and when required.

CONTACTS

1. Liaison with all internal teams
2. Head of Legal or other reviews files on a daily basis
3. Liaison with Lenders, Solicitors, Brokers, Client & Customer

Job ref: FEEE0712

Date: 01/03/2015

The company reserves the right to vary or amend the duties and responsibilities of the post holder at any time according to the needs of the business.

