

*Belonging Never Felt Better*



Non-Exempt  
Grade: 6

**TITLE:** **Member Services Specialist (I)**

**REPORTS TO:** Member Services Specialist Supervisor and may receive direction from Member Services Manager and/or Quality Services Manager

**SUPERVISES:** No one

**SUMMARY:** Under limited supervision, performs a combination of duties which may include member services, new accounts or support center functions. May be assigned to a specific department on a temporary basis. Must be able to work weekends/evenings, travel and on occasion, spend periods of time at outlying offices. This is a utility/relief position requiring flexibility and independence.

**ESSENTIAL FUNCTIONS:w**

- Performs member services duties when required and is able to perform all of the functions of a member services representative.
- Is familiar with, and follows security procedures.
- Relieves member services staff during leaves of absence, illness or vacation.
- Processes new accounts and explains credit union products and services to members. Relieves the new accounts desk, as required.
- Assists in proofing member services checks and processing branch deposits.
- Knows downtime, opening and closing procedures. Skillfully utilizes the computer system in those areas pertaining to new accounts and member services functions.
- Travels to outlying branches to relieve teller or new accounts staff and/or to assist in cash audits.
- Completes special projects.
- Performs other duties as assigned.

**PRINCIPAL RESPONSIBILITIES:**

- Understand and respond to complex verbal and written communications.
- Count and disburse bills, change, etc.
- With accuracy, enter data, using the keyboard and video terminal to record member transactions.
- Read signatures, signature cards, checks, vouchers, deposit slips, manuals, etc.
- Use a 10-key adding machine daily and operate a variety of office equipment.
- Reconcile and balance financial instruments.

**PHYSICAL REQUIREMENTS:**

- Must be able to operate an automobile and possesses a valid California Driver's License.
- Lift, carry and store change bags weighing up to 50 lbs.
- Load, unload, use and repair machinery requiring fine motor and physical dexterity.
- Lift, carry and load 50 lb. boxes of paper for the voucher printer.
- Must remain standing for prolonged periods. Cannot leave teller station while performing job duties.

**REQUIRED KNOWLEDGE:**

Basic reading, writing and math skills, 10-key by touch, general computer terminal experience. Must have a thorough knowledge of member services and working knowledge of new accounts duties and responsibilities. Must be familiar with security practices, downtime and closing procedures, proofing and check deposits.

**EXPERIENCE:**

This is a utility/relief position requiring a minimum of one year member services experience and demonstrated knowledge of credit union policies, products and procedures. Must be bondable.

**EDUCATION:**

High school graduation or equivalent.