



JOB DESCRIPTION

Member Services Representative (I)

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| Department | Member Services Branch |
| Reports to | Member Services Manager, Member Services Supervisor. May receive direction from AVP Member Services Branches. |
| Supervises | N/A |
| Pay Grade | Non-Exempt Grade 5 |

Job Summary

Under close supervision, performs tasks associated with the processing of member transactions such as receiving and disbursing funds, posting deposits, payments, and withdrawals. Must account for these daily by balancing accurately. Operates the computer terminal and knows the credit union's data processing system relating to Member Services Representative functions. Procedures are explicitly defined and adherence to established practices is required.

Essential Functions

- In a courteous, professional manner, assist members with financial transactions.
- Service member accounts
- Assist members with initial fraud discussion and associated account maintenance
- Disburse funds by cash, check, or transfer. Accept deposits or payments and enter each transaction into the credit union's data processing system.
- Sell negotiable items such as cashier's checks, and pre-paid cards etc.
- Accept and process financial service request forms to include wire transfers, automatic transfers, check reorders, etc.
- Accurately balance cash, cash items, and general ledger entries at the end of each business day.
- Admit, with proper identification, access to safe deposit boxes, where applicable.
- Under dual control, process and document ATM deposits, merchant bags, and night depository.
- Follow security procedures for member services area, including cash drawer limits and robbery procedures.
- Is familiar with credit union policies, procedures, products, and services and is able to answer member questions and make referrals, as needed.
- Cross-service credit union products and services.
- Itemize and balance checks.

- Perform other duties as assigned.

Required Knowledge, Skills, and Abilities

- Basic reading, writing, arithmetic, and communication skills.
- Requires a working knowledge of office practices and procedures, including data processing, the ability to make mathematical computations, to operate calculators and adding machines, to type with reasonable speed and accuracy, to write legibly, and to deal with members tactfully and courteously.
- Actively practice the behaviors required by the credit union's guidelines for Quality Service in all interactions with members and staff.
- Maintain excellent member relations, provide services, and cross-service credit union products.
- Preserve member confidentiality.
- Understand and respond to complex verbal and written communications.
- Ability to count and disburse bills, change, etc.
- With accuracy, enter data using the keyboard and computer terminal to record member transactions.
- Ability to read signatures, signature cards, checks, vouchers, deposit slips, manuals, etc.
- Use a 10-key adding machine daily and operate a variety of office equipment.
- Must work harmoniously with other employees.
- Reconcile and balance financial instruments.

Education and Experience

- High school graduation or equivalent.
- Cash handling, familiarity with computers and public contact background helpful. No prior experience with a financial institution is required.

Additional Requirements

- Incumbent must be bondable.

Physical Requirements

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.