



JOB DESCRIPTION
Member Services Supervisor (I)

Department	Member Services Branch
Reports to	Manager, Member Services and receives direction from the Assistant Vice Presidents of the Member Services Branches and Senior Vice President/Chief Member Experience Officer
Supervises	Provides working leadership to Member Services staff

Job Summary

Under general supervision, upholds the standards of quality service in all member transactions. Trains new employees and provides working leadership and guidance to Member Services staff. Performs a wide variety of complex duties relating to the handling and processing of members’ transactions. Handles and adjusts member complaints, transactions, and errors.

Essential Functions

- Oversee the daily operations of the Member Services Branch and staff ensuring that adequate coverage is present at all times, schedule work hours, breaks, and lunches.
- Manage multiple workflows in OnBase.
- Assist in the hiring, training, performance evaluations, coaching, and discipline of employees.
- Assist with informational staff meetings as required.
- Performs, monitors and upholds established procedures outlined in the Operations Manual, the Member Needs and Products Guide, the Security Manual, the Injury and Illness Prevention Program and related materials.
- Perform Member Services duties when required and is able to perform all the functions of a Member Services Representative (I), Member Services Representative (II), and Sr. Member Services Representative:
 - With tact and professionalism, handle and adjust member complaints. Resolve problems and answer questions.

- Assist with beginning and end-of-day reports and procedures. May open or close the office as required.
- Ability to establish and process basic new member accounts, prepare required paperwork, and perform other new accounts duties as required.
- Assist in safe deposit accounts, open and close safe deposit boxes, where applicable.
- Admit, with proper identification, access to safe deposit boxes, where applicable.
- Assume some leadership and Member Service Representative training responsibilities as directed by the Member Services Branch Manager and/or Supervisor.
- 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.
- 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.
- Itemize and balance checks.
- Lead Member Services Representative on the Member Services Representative line.
- Extensive knowledge in Member Services Representative operations.
- Has thorough knowledge of the financial services offered by the credit union and cross-services companion products/services as needed.
- Maintain accurate files on member accounts and/or loan files as required.

- Assist the Member Services Branch Manager and/or Supervisor with handling the OnBase report Queue and pending paperwork.
- Assume leadership and scheduling responsibilities as needed.
- May perform essential leadership functions for up to 50% of the scheduled time, depending on Member Services Branch size and needs, as required.
- Ensure that the safe and/or vault is secure at closing time and alarms are properly set.
- Supervise all processing of daily transactions, including cash, checks, drafts, vouchers, and cash receipts.
- Proof Member Services staff work determines that all cash setups and the vaults are in balance each night and that cash is properly secured at all times.
- Solicit new business and cross-service the benefits and services of the credit union.
- May be responsible for office cash orders and ensuring that cash limits are maintained at appropriate levels.
- Perform monthly audits, prepare and receive cash, and perform other support activities.
- Is responsible for inventory control and replenishment of supplies.
- Must work harmoniously with other employees.
- Perform other duties as assigned.

Required Knowledge, Skills, and Abilities

- 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-services credit union products.
- Preserve member confidentiality.
- Understand and respond to complex verbal and written communications.
- Count and disburse bills, change, etc.
- With accuracy, enter data using the keyboard and computer 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.
- Work effectively with staff, management, support personnel, and members.

- This position requires knowledge and experience in Member Services, including the ability to assign work, schedule, coordinate, and provide technical guidance to Member Services staff and review progress.
- Must be able to work tactfully and professionally with members to solve problems and handle complaints.

Education and Experience

- High school graduate or equivalent.
- This is an entry level supervisory position requiring two or more years of Member Services Representative experience. At least one year with Coast Central Credit Union is preferred.
- Must be knowledgeable in credit union policies, procedures, and philosophy, and have demonstrated the ability to oversee and train staff.

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.