

**Coast Central**   
**Credit Union**  
**JOB DESCRIPTION**

Non-Exempt  
Grade: 5

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

**REPORTS TO:** Manager, Member Services

**SUPERVISES:** No one

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

**PRINCIPAL RESPONSIBILITIES:**

- In a courteous, professional manner, assists members with financial transactions.
- Disburses funds by cash, check, or transfer. Accepts deposits or payments and enters each transaction into the credit union's data processing system.
- Sells negotiable items such as cashier's checks, wire transfers, pre-paid cards etc.
- Accepts and processes financial service request forms to include automatic transfers, payroll cards, check reorders, etc.
- Accurately balances cash, cash items, and general ledger entries at the end of each business day.
- Admits, with proper identification, access to safe deposit boxes.
- Under dual control, processes and documents ATM deposits, merchant bags, and night depository.
- Follows security procedures for member services area, including cash drawer limits and robbery procedures.

- Is familiar with credit union policies, products, and services and is able to answer member questions and make referrals, as needed.
- Cross-sells credit union products and services.
- Itemizes and balances checks by batch.
- Must work harmoniously with other employees.
- Performs other duties as assigned.

### **ESSENTIAL FUNCTIONS:**

- Actively practices the behaviors required by the credit union's guidelines for Member Service in all interactions with members and staff.
- Maintains excellent member relations, provides services, and cross-sells credit union products.
- Preserves 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.
- Lift, and carry, up to 50 lbs.
- Load, unload, and repair machinery requiring fine motor and physical dexterity.
- Must remain standing for prolonged periods of time. Cannot leave MSR station while performing job duties.

**REQUIRED KNOWLEDGE:**

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. Incumbent must be bondable.

**EXPERIENCE:**

Cash handling, familiarity with computers and public contact background helpful. No prior experience with a financial institution is required.

**EDUCATION:**

High school graduation or equivalent.