



<b>JOB DESCRIPTION</b>	
<b>Member Services Representative II New Accounts</b>	
<b>Department</b>	Member Services Branch
<b>Reports to</b>	Manager, Member Services and Member Services Supervisor. May receive direction from AVP, Member Service Branches
<b>Supervises</b>	May provide leadership to Member Services staff
<b>Pay Grade</b>	Non-Exempt Grade 8

## Job Summary

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Under general supervision, performs all the duties and functions of a Member Services Representative (I) and establishes new member accounts and/or performs basic loan processing while actively cross-servicing credit union products and services. Assists with opening and closing procedures. Has demonstrated knowledge of credit union products and services and the ability to explain and cross-service them to members and potential members. This is an intermediate level Member Services position requiring aptitude and knowledge in a variety of operational functions.

## Essential Functions

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- Assist with beginning and end-of-day reports and procedures. May open or close office as required.
- On a daily basis, establish and process new member accounts, prepare required paperwork, and perform other new accounts duties as required.
- May process loan applications and provide clerical support to Member Loan Services staff as required.
- Assist in safe deposit accounts, open and close safe deposit boxes, where applicable.
- Assume some leadership and MSR training responsibilities as directed by MSB manager and/or supervisor.
- Perform Member Services duties and is able to perform all the functions of a Member Services Representative (I):
  - *In a courteous, professional manner, assist members with financial transactions.*
  - *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, wire transfers, pre-paid cards etc.*
  - *Accept and process financial service request forms to include 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.*
- *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, 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 by batch.*
- Must work harmoniously with other employees.
- Perform other duties as assigned.

## **Required Knowledge, Skills, and Abilities**

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- 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.
- Knowledge of Member Services duties including the ability to assist members with problems and cross-service products and services, down-time procedures and the computer system.
- Knowledge of credit union practices and products and have assisted in opening and closing procedures, including end-of-day reports.
- Preserve member confidentiality.
- Understand and respond to complex verbal and written communications.
- Must have basic new accounts, loan processing, and/or safe deposit skills or experience
- 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.

## **Education and Experience**

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- High school graduate or equivalent.

- A minimum of one-year full time Member Services experience at Coast Central Credit Union or two or more years with another financial institution.

### **Additional Requirements**

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- Incumbent must be bondable.

### **Physical Requirements**

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- Ability to lift, carry, and store change and supplies weighing up to 50 lbs.
- Ability to load, unload, and repair machinery requiring fine motor and physical dexterity.
- Ability to remain seated and/or standing for prolonged periods of time. Cannot leave station while performing job duties.