



## JOB DESCRIPTION

### Member Services Representative I

<b>Department</b>	Member Services Branch
<b>Reports to</b>	Manager, Member Services, Member Services Supervisor. May receive direction from AVP and MSB's
<b>Supervises</b>	N/A
<b>Pay Grade</b>	Non-Exempt Grade 5

### Job Summary

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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 MSR functions. Procedures are explicitly defined and adherence to established practices is required.

### Essential Functions

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- 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, 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.
- 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.
- 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.
- 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.

## **Education and Experience**

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

## **Additional Requirements**

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- Incumbent must be bondable.

## **Physical Requirements**

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- Manual dexterity and fine motor skills required to accurately use a computer terminal, keyboard, and other office equipment.
- Ability to lift and carry up to 50 lbs occasionally.
- Ability to remain standing for extended periods of time.
- Ability to work prolonged periods sitting at a desk and working on a computer.
- Ability to load, unload, and repair machinery requiring fine motor and physical dexterity.