



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

Job Summary

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

- 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

- 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
- Ability to 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

- 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

- 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.