



Member Service Representative

Classification

Non-Exempt

Expected Work Hours

7:50AM-5:00PM Mon, Tues, Wed, Thurs, & Friday

Thursday Rotation (*every other week*)

7:50AM-5:00PM Monday and Friday

7:50AM-4:15PM Tuesday and Wednesday

7:50AM-6:10PM Thursday

Reports to

Member Service VP / Head MSR

Date

TBD

JOB PROFILE

Summary/Objective

The Member Service Representatives act as tellers and personal bankers. All MSR's are to process all transactions accurately and efficiently in accordance with established policies and procedures. The MSR will assist our members in managing their accounts and finances. Our front line is also the front line in communicating with our members. This allows our MSR to work one on one with members ensuring the best service, including guiding members to appropriate products or services and building long term relationships. The MSR must be comfortable multitasking, performing hundreds of transactions daily, communicating with all different types of members and cross-selling our credit union's products and services.

Essential Functions

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

1. Provide & maintain excellent member service
2. Welcome all coming into the credit union by making eye contact, speaking in a professional and timely manner, screening calls, and assisting members to the appropriate department or person.
3. Provide basic and accurate information in-person and via phone/email
4. Maintain office security by following safety procedures and controlling access via the reception desk and lobby area (monitor lobby activity including the waiting area, front door and loan hallway.) Use log sheets when necessary
5. Conduct transactions accurately and efficiently using established guidelines and regulatory requirements
6. Manage risk in every transaction to detect and prevent fraud, scams, elder abuse, etc.
7. Assist with member accounts; open, close, transact
8. Count swiftly and accurately

Additional Duties Include:

1. Ensure teller area is tidy and presentable
2. Respond to incidents in lobby area
3. Perform clerical duties such as filing, photocopying, transcribing and faxing
4. Ensure incoming mail is delivered to teller line daily and going afternoon mail is delivered to the post office daily
5. Understand and retain product knowledge to build member relationships and make quality referrals
6. Proofing daily work and correcting errors
7. Process items in the drop box
8. Ordering checks and debit cards
9. Assist members with credit cards and debit cards
10. Processing draft returns
11. Maintaining and balancing ATMs and cash vault
12. Complete wire transfers
13. Running OFAC and FINCEN reports
14. Review and Process Money Order Log
15. Process Charge Off accounts
16. Complete Research as requested
17. Reviewing and updating aggregated reports
18. Reviewing and updating large dollar negotiable item, and wire, logs.
19. Completing CTRs and SARs
20. Processing Payrolls
21. Assist members with online banking services; Ntouch24 and Dial-a-teller
22. Additional duties maybe required at a later date as needed.

*Option to volunteer for marketing events

Supervisory Responsibility

N/A

Work Environment

This job operates in a professional credit union setting. This role routinely uses standard office equipment such as computers, phones, photocopiers, filing cabinets and fax machines.

Physical Demands

This position requires manual dexterity, the ability to lift files and open filing cabinets. This position requires bending, stooping or standing as necessary.

1. Required to sit, stand, walk and bend repetitively
2. Required to push, pull, and lift objects greater than 30 pounds.
3. Work in an environment that may host noise, activity, interruptions and other distractions and events.

Position Type/Expected Hours of Work

This is a regular full-time position. Employees are scheduled for and perform a forty (40) hour work week on a regular basis. Full-time employees are eligible for employee benefits. Full-time employees who do not continually meet full-time criteria will not be eligible for employee benefits.

Travel

Some travel is expected for this position.

Preferred Education and Experience

High school diploma or equivalent.

Customer service Experience.

Previous teller or member service representative experience.

Other Duties

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

Job functions may be changed by management without notice; This job description in no way constitutes an employment agreement, and all employees are at-will employees.