



Member Service Representative

Position Title:	Member Service Representative	Prepared By:	Debra Collins	Date	01-10-22
Department:	Main Office	Approved By:	Debra Collins		
Supervisor:	Retail Branch Administrator	EEOC:	FLSA status: Full-Time Non-Exempt	Salary Range: Min. Mid. Max.	

JOB FUNCTION: Serves as liaison between the member and the credit union. Responsible for providing account information, opening new accounts, and professionally handling members’ daily credit union needs. Provides a variety of transaction services to members.

DUTIES AND RESPONSIBILITIES:

- Represent the credit union to members in a courteous and professional manner, and provide prompt, efficient and accurate service in the processing of transactions.
- Perform routine transactions, including but not limited to opening accounts, processing check and ATM card orders, issuing temporary checks, processing deposits, withdrawals, loan payments, and transfers, accepting and processing loan applications.
- Provide in person, and by telephone, information concerning credit union products, services & policies.
- Cross-sell other products/services to members.
- Respond to members’ requests, problems, and complaints, and/or direct them to the proper person for specific information and assistance.
- Open new accounts, certificates of deposit, IRAs, and service existing accounts. Prepare all required documentation and provide members with all necessary related account information.
- Promote team participation in accomplishing departmental and organizational goals.
- Demonstrate flexibility in meeting member, co-worker and credit union needs.
- Provide backup assistance in all operational areas as needed. (Teller Services, etc.)
- Handle requests from members for stop payments, transfers, share withdrawals, check requests, line of credit advances, and any other request received from members.
- Research and resolve member account questions/problems (i.e., deposit, withdrawal, and loan payment discrepancies, overdrafts, charges, fees, transfers, etc.).
- Assist members in balancing their accounts, as needed.
- Trace source documents and other records as needed by members (copies of cleared share drafts, statements, etc.).
- Assist members with proper completion of payroll deduction and direct deposit forms. Input necessary information into various systems. Forward proper documents to respective payroll departments. Set up payroll distribution amounts on system.
- Back-up to the Teller area.
- Perform other duties as assigned to include working member service front desk.

QUALIFICATIONS:

ABILITIES:

10 key calculator and light typing skills. Effective written and oral communication. Good interpersonal skills. Organization and problem-solving skills. Time management skills and ability to meet deadlines. Some computer skills (Word processing, spreadsheets, etc.) Ability to operate standard office equipment. Fast efficient work habits. Willing to learn new tasks and accept changes and new responsibilities. Pleasant and neat appearance.

**KNOWLEDGE/
EDUCATION**

High school diploma or equivalent. Extensive knowledge of CUA products, services, policies and procedures, and computer commands. Knowledge of CUA loan products, policies, and procedures a plus. Some college education preferable.

EXPERIENCE:

Prior Member Services experience or training preferred.