



## POSITION DESCRIPTION

<b>Position Title:</b>	Member Service Representative I
<b>Department:</b>	Frontline
<b>Reports To:</b>	Operations Manager/Branch Manager
<b>Classification:</b>	Non-exempt
<b>Purpose:</b>	The Member Service Representative is a core position and is responsible for delivering quality frontline service to our members through a well-developed knowledge of our Filer Credit Union products and services. Along with the responsibility of ensuring accurate cashiering and transactional services to members, the Member Service Representative is a multi-skilled role with opportunities to develop a professional career with the financial service industry covering the span of frontline functions and services.

### Basic Duties

- Access computer, accept member deposits, receipt transaction on computer and verify currency, cash checks, savings withdrawals and make cash advances, perform account transfers, accept loan payments, issue cashier checks, money orders and redeem savings bonds as well as selling gift card and travel cards.
- Must have basic knowledge of office equipment such as, computers, calculators, scanners, currency counters, drive-up equipment, ATM, vaults, copier, telephones and printers.
- Greet members to the credit union in a professional, courteous and timely manner.
- Receive share drafts and/or cash for deposits to accounts.
- Cash share drafts and process withdrawals. Verify and count cash back to member with accuracy.
- Receive loan payments (ie, mortgage, consumer, commercial and other loans). Ensuring payments are accurate and satisfy the amount due.
- Ensure all checks received have proper endorsements, signatures, verify written and numerical amounts and they are not stale dated.
- Detect fraudulent currency and checks effectively.
- Place holds on checks if suspicious of malicious or fraudulent activity to protect member and the credit union from a potential loss.
- Process night drop transactions in dual control.
- Process mail transactions.
- Link online banking accounts.



- Balance teller transactions twice a day (lunch break and end of shift) with accuracy and little to no errors. Research and resolve discrepancies that may arise; seek assistance from a Member Service Representative II, or Supervisor if needed.
- Promote credit union products and services to members.
- Ensure teller station is organized and clean at all times as well as stocked with correct forms, brochures and supplies.
- Maintain current and up-to-date comprehensive knowledge on all credit union products and services. Maintain current and up-to-date knowledge on all credit union policies and procedures, regulations, including up-to-date robbery and security measures and training.
- Help balance branch vault/ATM
- Any other duties assigned by manager

## Qualifications

**Education:** High School or GED

**Required Knowledge:** Knowledge of related computer applications. Credit Union/Banking knowledge preferred. Basic knowledge of office equipment such as, computers, calculators, scanners, currency counters, drive-up equipment, ATM, vaults, copiers, telephones, and printers.

**Experience Required:** Member Service Experience preferred

### Skills/Abilities:

- Must be able to work with confidential information.
- Must be dependable in both attendance and punctuality.
- Must be able to sit, stand and walk as required
- A patient and empathetic attitude
- Strong time management and organizational skills
- Adaptability and flexibility
- Comfortable working in fast-paced environments
- Troubleshooting skills, either basic or advanced, depending on the role and industry
- Phone skills, including familiarity with complex or multi-line phone systems.
- In-depth knowledge of a company's products and/or services
- Must be willing to take initiative to learn new tasks and accept new responsibilities.
- Must be a loyal team worker, one who is willing to help others, both within the department and in other departments



**Physical Activities and Requirements of this Position**

**Talking:** Able to confidently, adequately, and accurately converse with members.

**Physical Strength:** Exert up to 10lbs of force occasionally. Ability to lift 50lbs.

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