

Community Resource Credit Union
Structured Compensation - Job Description
Member Services Representative

Data Year: 2018

Prepared On: 09/18/2018

Department:	Retail Delivery	Grade:	6
Reports To:	Teller Manager	Classification:	Non-Exempt
Supervises Direct:	0	Supervises Indirect:	0
Approved By:	VP Retail Delivery	Effective Date:	06/01/2010
		Revised Date:	07/10/2018

Role:

Represents the Credit Union within the branch environment in a professional manner when greeting members or potential members and ensuring that their needs are exceeded with exceptional service. Actively cross-sells credit union products and services to ensure organizational and departmental goals are met. Assists members with their financial transactions, including paying and receiving cash and other negotiable instruments while delivering high personable service.

Essential Functions & Responsibilities:

- E 65% Greets the member or potential member as they enter the credit union, quickly assesses members needs regarding financial transactions and services. Adheres to internal controls, security and safety procedures.
- E 20% Cross-Sells appropriate products and services that are in the member's best interests.
- E 5% Balances cash drawer and daily transactions.
- E 5% Directs memberships, trends, suggestions, comments to Branch Manager. Assures lobby area is neat and acceptable in appearance.
- N 5% Performs other duties as assigned.

Performance Measurements:

1. Maintains effectiveness in varying environments, task, responsibilities and people while still completing assignments in a timely manner.
2. Maintains supportive and harmonious relationships with other CRCU managers and staff.
3. Cross sells credit union products and services
4. Interacts with members as required in order to perform duties and responsibilities.
5. Maintains a professional work environment and professional appearance.
6. Conducts communications with reporting manager to advise on problems and issues impacting credit union operations.
7. Balances in compliance with Teller Balancing Standards
8. Processes up to 150 transactions per day.
9. Balances daily with no more than one posting error per month
10. Requires some analysis or research to determine the best solution for a limited number of transactions.

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11. Completes wire transactions, disputes, debit card request, re-pin debit card, and any other maintenance requested from the member.
12. Gathers information from various sources, comparing and weighing information to make logical decisions.
13. Demonstrates an understanding of, and follow the requirements of all regulation compliance, including but not limited to those of Bank Secrecy Act (BSA), Anti-Money Laundering (AML), Office of Foreign Assets Control (OFAC), Customer Identification Program (CIP) and Member Due Diligence (MDD) as it specifically relates to their job functions. Employee shall be trained annually in BSA/AML compliance

Knowledge and Skills:

Experience	One year to three years of similar or related experience.
Education	A high school education or GED.
Interpersonal Skills	Courtesy, tact, and diplomacy are essential elements of the job. Work involves much personal contact with others inside and/or outside the organization for purposes of giving or obtaining information, building relationships, or soliciting cooperation.
Other Skills	Good verbal and written communication skills are required.
Physical Requirements	While performing the duties of this job, the employee is regularly required to use hands or fingers, handle or feel; reach with hands and arms; talk and hear. The employee frequently is required to stand, walk, and sit. Specific vision abilities required of this job include close vision and ability to adjust focus.
Work Environment	Work is performed indoors with some potential for exposure to safety and health hazards related to electronics work. May require periodic travel. There is exposure to potential hazardous conditions such as robbery. Employees are to receive detailed instructions and procedures to follow in order to minimize risk.

In accordance with the American with Disabilities Act, it is possible that requirements may be modified to reasonably accommodate disabled individuals. However, no accommodations will be made which may pose serious health or safety risks to the employee or others or which impose undue hardships on the organization.

Job descriptions are not intended and do not create employment contracts. The organization maintains its status as an at-will employer. Employees can be terminated for any reason not prohibited by law.

This Job Description is not a complete statement of all duties and responsibilities comprising the position.

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Printed Employee Name

Date

Employee Signature