



MY CREDIT UNION JOB DESCRIPTION

JOB TITLE:	Member Service Representative
FLSA CLASSIFICATION:	Non-Exempt
REPORTS TO:	Branch Supervisor
LOCATION: Check One:	<input type="checkbox"/> Richfield <input type="checkbox"/> Lyndale <input type="checkbox"/> OSR <input type="checkbox"/> IGH

JOB SUMMARY:

To satisfy the needs of our members by providing quick and accurate service in a professional friendly manner. This includes posting transactions, answering inquiries and respond to various member requests by providing routine information on Credit Union products & services, policies including eligibility for membership or referring members to appropriate personnel for more advanced issues. This employee is always expected to maintain a professional appearance and comply with all Credit Union policies and procedures, including Standards of Conduct and Confidentiality.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

1. Provides member and team support as described on MY CREDIT UNION's Mission statement.
2. Represents the Credit Union in a courteous and professional manner, providing prompt, efficient and accurate service in the processing of transactions.
3. Properly follow security procedures, including but not limited to opening and closing procedures.
4. Cross sell Credit Union Products and Services
5. Responsible for regular and predictable attendance including punctuality.
6. Actively cross sells and maintain up-to-date knowledge on all products and services.
7. Performs other duties as needed or assigned.

STANDARDS OF PERFORMANCE:

1. Always convey a professional image by being respectful, courteous, and considerate of members and co-workers through verbal and non-verbal communications, adhering to MY CREDIT UNION's dress code, and maintain a clean organized workspace.
2. Follow MY CREDIT UNION's Harassment, Discrimination and Respectful Conduct Policy and the Fraud Policy/Code of Ethics Statement.
3. Complies with Bank Secrecy Act/Anti-Money Laundering/CIP (U.S. Patriot Act) procedures and policies.
4. Safeguard the confidentiality and security of member information and other sensitive data, in accordance with MY CREDIT UNION's policies and procedures.
5. To remain compliant with all other MY CREDIT UNION's policies and procedures
6. Be an effective team member through cooperation, flexibility, dependability, attendance, lack of tardiness and participation at meetings and training.

TELLER DUTIES:

1. Perform routine member service transactions, including but not limited to, deposits, withdrawals, cash advances, loan payments, transfers, check cashing, selling gift cards, etc.

2. Respond and resolve member's requests.
3. Provide account information regarding account status, current balances, and loan payoffs.
4. Follow internal security procedures for member identification.
5. Prepare and process Federal Reserve cash shipments and deliveries.
6. Prepare and process ATM shipment.
7. Follow internal balancing procedures.
8. Follow Safe Deposit Box procedures for member access.
9. Follow scanning procedures.
10. Order and fill branch supplies.
11. Included in a Saturday work schedule rotation.

MINIMUM QUALIFICATIONS:

Education:

1. High School diploma or equivalent.

Experience:

1. 6 months or more of customer service.
2. Credit Union experience preferred.

Other Required Knowledge, Skills, and Abilities:

1. Excellent verbal and non-verbal communication skills. Ability to speak effectively to members and employees of the organization. Ability to read and interpret basic forms, credit union documents, operating and maintenance instructions, and procedure manuals.
2. Desire, ability, and experience in working with and helping people in a professional setting with a professional business appearance.
3. Up-to-date and comprehensive knowledge of all MY CREDIT UNION'S products and services.
4. Proficiently operate a computer. Working knowledge of Microsoft Office and Windows operating system. Ability to use copy machine, printer, and general office equipment.
5. Must be well organized.
6. Must be bondable and honest.

EQUIPMENT USED:

- Microsoft 365, Microsoft Office Suite, 10-Key Calculator, Computer

MENTAL & PHYSICAL DEMANDS/WORKING CONDITIONS:

Mental Effort:

1. Able to manage multiple requests at the same time.
2. Able to maintain a professional demeanor in stressful circumstances.
3. Ability to communicate with the public.

Physical Requirements:

1. The employee must be able to lift 35 pounds.
2. The employee is regularly required to stand for extended periods (6-8 hours a day).
3. Use their hands and fingers to handle or feel objects, tools, or controls; reach with hands and arms; and talk or hear.
4. The employee is occasionally required to climb, balance, stoop, kneel, crouch, or crawl.
5. The employee must be able to read from a computer screen and enter data with the use of a keyboard.

Working Conditions:

1. Stress varies depending on workflow from high to low.
2. Some travel between offices may be required.



Job Description Acknowledgement

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Disclaimer: This position description is intended to describe the general nature and level of work being performed by the person assigned to this position.

It is not designed to contain or be interpreted as a comprehensive inventory of all duties, responsibilities and qualifications required of employees assigned to this job.

Employees holding this position will be required to perform any other position related duties as required by management.

Individuals with disabilities will not be disqualified because of their inability to perform nonessential or marginal functions of the job. No selection criteria that screen out or tends to screen individuals with disabilities will be used by the credit union. The credit union will provide reasonable accommodations to assist individuals with disabilities based on guidelines within the Americans with Disabilities Act.

I have read and understand all the above. I have reviewed the essential duties and responsibilities for which I am responsible. I understand that this document does not create an employment contract and that I am employed by MY CREDIT UNION on an "at will" basis.

Employee Signature

Date

Supervisor Signature

Date

