

Member Service Representative I

Reports to: MSR Supervisor Effective Date: September 2022

Department: Member Services Last Revision Date: 2021

Status: Non-Exempt

SUMMARY

The Member Service Representative I is the face of Marshfield Medical Center Credit Union and is vital in providing outstanding service to our members. This position is responsible for processing financial transactions professionally and efficiently, ensuring accuracy, confidentiality, and adherence to the credit union's policies and procedures. The Member Service Representative I will also assist members with account inquiries, promote products and services, and help foster long-term member relationships.

QUALIFICATIONS

Must be a high school graduate or equivalent or in the process of completing their high school degree. Previous cash handling and customer service experience preferred.

REQUIREMENTS

The job requires standing for long periods of time with occasional sitting. The ability to exert up to 30 pounds of force occasionally and/or a minimal amount of force frequently to lift, carry, push, pull, or otherwise move objects. Ability to demonstrate and apply manual dexterity to operate office equipment. Ability to view computer monitors for extended periods. Ability to work with confidential information, materials, and files appropriately, professionally, and discreetly. Ability to converse with coworkers and members in person, over the phone, and by email.

ESSENTIAL FUNCTIONS AND BASIC DUTIES

- 1. Represent the credit union to the members in a courteous and professional manner and provide prompt, efficient, and accurate service in processing transactions, either in person or on the telephone.
- 2. Report to work on time and as scheduled while maintaining a professional appearance.
- 3. Maintain knowledge of credit union products and services to educate and inform members, including referring and or cross selling credit union products or services.
- 4. Efficiently and accurately handle all member transactions, including, but not limited to, deposits, withdrawals, transfers, cash advances, corporate drafts, gift cards, balancing daily work, and operating a cash drawer/TCR machine.
- 5. Research and follow up with member inquiries regarding credit union accounts and services in a timely manner.

- 6. Promptly answer telephone inquiries and forward the call to appropriate team members as necessary.
- 7. Maintain knowledge of and comply with all credit union policies and procedures, including state and federal regulations.
- 8. Accurately and efficiently complete all member or account related forms and forward to the appropriate department for action and/or filing (for example, stop payments, unauthorized debit etc.)
- 9. Perform opening/closing procedures.
- 10. Promote teamwork by assisting other teammates when needed or assisting in special projects as requested by a supervisor.
- 11. All other duties as assigned.

INTENT AND FUNCTION OF JOB DESCRIPTIONS

Job descriptions assist organizations in ensuring that the hiring process is fairly administered and that qualified employees are selected. They are also essential to an effective appraisal system and related promotion, transfer, layoff, and termination decisions. Well-constructed job descriptions are an integral part of any effective compensation system.

All descriptions have been reviewed to ensure that only essential functions and basic duties have been included. Peripheral tasks, only incidentally related to each position, have been excluded. Requirements, skills, and abilities included have been determined to be the minimal standards required to successfully perform the positions. In no instance, however, should the duties, responsibilities, and requirements delineated be interpreted as all-inclusive. Additional functions and requirements may be assigned by supervisors as deemed appropriate.

In accordance with the Americans 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 as 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.

Team Member Name (printed):	
Signature:	
Date:	