



Denver Municipal Federal Credit Union

Job Description: 7005
Phone Center Representative II

Date: August 1996

Reports to: Service Center Supervisor

Objective: To take a leadership, full-performance role in providing quality services to members by telephone and other telecommunication methods, including the internet. To act as an accurate and timely information resource to members, and assist members with their financial needs regarding the daily receipt of loan payments, share withdrawals, new member activity, credit union services, policies and procedures, and other needs or interests, as required or requested.

Essential Responsibilities:

1. Takes a leadership role in performing as a primary public contact to members by telephone and other telecommunication methods, including the internet. Acts as an accurate and timely information resource to members, taking the initiative to assist members with their financial needs regarding the daily receipt of loan payments, share withdrawals, new member activity, credit union services, policies and procedures and other needs or interests, as required or requested.
2. Monitors staff workstations, including the main lobby area, for compliance to DMFCU housekeeping standards. Monitors staff for compliance to DMFCU dress code, attendance and related performance standards. Keeps supervisor informed and recommends changes when appropriate.
3. Receives and processes various financial transactions within established standards for accuracy and timeliness, as required or requested, including: payroll deduction forms; new accounts and changes to existing accounts; name, address and other changes; returned mail; completion of loan worksheets, as required; account research and special services transactions; and *Tellerphone* applications.
4. Provides training, cross-training, technical direction and guidance to Teller Service Representatives, staff and members, as required or requested.
5. Conducts audits of payroll forms, and membership cards, for designated new accounts. Determines deficiencies and recommends improvements, as necessary. Maintains confidentiality.

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6. Establishes/maintains standards for complaint resolution. Maintains a log of all complaints, tracks complaint resolution, and provides supervisor with weekly, monthly, quarterly and annual reports, as directed.
7. Coordinates mail distribution; processing returned mail; check ordering; *Tellerphone* processing; processing second party checks; filing; auditing; as directed.
8. Completes and reviews for supervisory approval, various reports and analysis: overdrawn reports; monthly override report; phone reports; wire transfers; stop payments; daily client reports; new accounts; check research; *Tellerphone* utilization; Verification of Deposits; weekly/monthly supply lists; and other designated transaction reports.
9. Monitors employee performance and informs supervisor, as directed. Takes a leadership role in coordinating phone center coverage, use of/access to workstations and microfiche.
10. Coordinate all ATM/credit/debit card plastic requests with the Card Services Specialist.
11. Performs as back-up/additional staff support for scheduled and unscheduled absences to the Service Center Representatives I position and the Teller Service Representatives I.
12. Performs other related duties, including special projects, as required or requested.

Qualifications:

Education/Experience: Education equivalent to graduation from High School, and two (2) or more years of recent and related work experience with a demonstrated knowledge of credit union policies and procedures. Demonstrated consistency in accurately handling cash and recording daily financial transactions. Demonstrated successful experience as a Teller Service Representative, is desired. Successful completion of a Colorado Credit Union League course with a class grade of B or better or the equivalent in related education and experience, is desired. Must be able to work flexible hours. Must be bondable.

Performance: Demonstrated experience performing in compliance with established human resource and departmental policies regarding: attendance (absences, tardiness, sick leave and vacation use, and other scheduled or unscheduled absences); dress code; customer/member services; safety; security, disaster and other policies procedures and practices. Demonstrated effective and diplomatic oral and written communication skills. Performance is limited to the scope of essential duties and responsibilities.

Physical/Environmental Characteristics: Essential duties are performed in a general office work environment and regularly require sitting at a work station/desk while completing paperwork or using computers, calculators, copiers, fax machines and other business office machines and equipment. Essential duties may also involve: occasional kneeling, squatting, bending, walking, crouching, stooping and lifting up to 30 pounds to stack, store supplies or various office equipment, as directed. **Compliance to security and safety procedures, including use of Personal Protective Equipment (PPE), is required.**