



Denver Municipal Federal Credit Union

Job Description: **8005**
Member Service Specialist

Date: November 1996

Reports to: Member Service Supervisor, Remote Teller Services Supervisor

Objective: To provide the initial point of contact for the immediate delivery of quality financial services to credit union members, and to coordinate the handling of member needs for products and services with other credit union staff.

Essential Responsibilities:

1. Greets members, determines the nature of the member's business, and promptly acts to complete the transaction or refers the member to the appropriate credit union staff.
2. Communicates to members general information concerning credit union services, policies and procedures, and performs cross-selling.
3. Receives share and account deposits, ensures for accuracy, and prepares proper receipt.
4. Receives loan and VISA payments, ensures for accuracy, and calculates interests in accordance with established procedures.
5. Provides cash advances on VISA and MasterCard, ensures for accuracy, and completes documentation in accordance with established procedures.
6. Provides travelers check service and money orders, as directed.
7. Disburses cash or check share and account withdrawals, and ensures for accuracy.
8. Operates in-house computer terminal and provides, as authorized, members with information concerning the status of their accounts.
9. Assists members in setting-up new accounts and in making changes to existing accounts, i.e., changes of name, address and other account information as needed.
10. Receives and processes direct deposits, payroll deduction starts, stops and increases.
11. Trains and cross-trains Member Service Specialists and other staff members as required or requested.
12. Completes, as required, signature cards, loan files and all member correspondence on a daily basis or, as authorized, within 10 days of receipt.
13. 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.

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14. Performs as a primary public contact to members. 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.
15. Opens and closes computer terminal accounts for assigned cash and transactions and balances to the terminal teller/close report; and remits receipts to Accounting.
16. Completes, thoroughly and accurately, signature cards, loan files and all member correspondence on a daily basis or, as authorized.
17. Provides training, cross-training, technical direction and guidance to Teller Service Representatives, staff and members, as required or requested.
18. Performs as back-up and additional staff support to Teller Service Representatives, Phone Center Representatives and for general staff scheduled and unscheduled absences.
19. Maintains privacy/security of member information through positive identification of phone center callers. Complies with established security policies and procedures.
20. Maintains a clean and safe work environment.
21. Performs other related duties, including special projects, as required or requested.

Qualifications:

Education/Experience: Education equivalent to graduation from High School. Demonstrated accuracy in the handling of cash and recording daily financial transactions. 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.**