



Denver Municipal Federal Credit Union

Job Description: **8010**
Member Service Specialist II

Date: November 1996

Reports to: Member Service Supervisor, Phone Center Supervisor, Remote Teller Services Supervisor

Objective: To take a leadership, full-performance role in providing quality services to members. 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, teller services, coordination of member needs for products and services with other credit union staff, and other needs or interests, as required or requested. To provide technical direction and guidance to staff.

Essential Responsibilities:

1. Takes a leadership role in performing 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, teller 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 individual and peer performance. Performs cross-selling. 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: cash handling (deposits/withdrawals), payroll deduction; new accounts/changes to existing accounts; name, address and other changes; returned mail; completion of loan worksheets, as required; account research/special services transactions; and *Tellerphone* applications.
4. Provides training, cross-training, technical direction and guidance to Member Service Specialists, staff and members, as required or requested.
5. Conducts audits of payroll forms, signature cards, and membership cards, for designated new accounts. Determines deficiencies and recommends improvements, as necessary. Maintains confidentiality.
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.

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7. 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.
8. Performs as back-up/additional staff support for scheduled and unscheduled absences by Member Service Specialists.
9. Provides quality teller services: setting-up new accounts and in making changes to existing accounts, i.e., changes of name, address and other account information as needed.
10. Opens and closes computer terminal accounts for assigned cash and transactions and balances to the terminal teller/close report; and remits receipts to Accounting.
11. Maintains various teller systems: opens/posts night deposits daily; maintains the coin machine; orders teller supplies; maintains money order and travelers check inventory.
12. Balances Automated Teller Machine(s)(ATM), researches ATM out-of-balance situations.
13. Takes supervisory direction in providing: teller replenishments; balancing the cash vault; breaking down cash received; ordering cash for the department; setting-up teller cash drawer(s) for the Saturday teller(s); entering general ledger journals for the cash vault; and providing over-ride authority to other tellers.
14. Opens and closes computer terminal accounts for assigned cash transactions and balances to the terminal teller/close report; and remits receipts to Accounting.
15. Maintains privacy/security of member information through positive identification of members by in-person or by phone.
16. Maintains a clean and safe work environment.
17. 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 Member Service Specialist, 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.