



JOB DESCRIPTION

POSITION TITLE: Member Service Representative I (MSR I)
(Transaction Processing)

REPORTS TO: MSR Supervisor and/or Branch Manager

EFFECTIVE DATE: August 28, 2023

FLSA STATUS: Full-time/Part-time, Non-Exempt

Hours: Varies

EEO CATEGORY: Administrative Support Personnel

Location: Queensgate/
Northwest/Blue Ash

I. PRIMARY RESPONSIBILITIES:

Serve as a liaison between the member and the credit union. Provide account information by phone or in person, as well as information on the full range of credit union products and services. Provide a variety of transactional services to members.

II. ESSENTIAL FUNCTIONS:

- Greet and welcome members and visitors to the credit union in a professional manner. Provide prompt, efficient, and accurate service in the processing of transactions.
- Complete transaction tracking daily and balance teller drawer in a timely manner at the end of each day.
- Provide in-person and by-telephone general and specific service-related information concerning member identification, credit union products, services, and policies.
- Respond to members' requests, problems, and complaints and/or direct them to the appropriate person for specific information and assistance.
- Handle requests from members for transfers of shares to loan payments, share withdrawals, money orders, travel notices, check requests, stop payments, and scanning member IDs and documents.
- Assist with marketing promo transactions such as Birthday Coin Grab and Report Card.

- Promote credit union products and services based on member needs that are obtained from member interviews and/or review of member's account. Actively cross-sell products.
- Assist members with On-line and Mobile Banking products and services.
- Process member mail transactions.
- Mail receipts and checks to members as indicated by policy and procedure.
- Provide information on investment alternatives to members wishing to deposit funds with the credit union.
- Research accounts for deposit, withdrawal, and loan-payment discrepancies.
- Assist members in balancing their accounts.

III. QUALIFICATIONS AND REQUIREMENTS:

- A high school diploma or comparable.
- Strong multi-tasking and problem-solving capabilities
- Attention to detail.
- Friendly and helpful demeanor.
- Desire to continuously learn and grow.
- Strong written and verbal communication.
- Previous customer service or bank/credit union experience preferred.

IV. BEHAVIORAL COMPETENCIES

1) Core Competencies:

- Member Focus (internal and external): Builds member confidence, is committed to increasing member satisfaction, sets achievable member expectations, assumes responsibility for solving member problems, ensures commitments to members are met, and solicits opinions and ideas from members.

- Dependability: Meets commitments, works independently, accepts accountability, handles change, sets personal standards, stays focused under pressure, and meets attendance/punctuality requirements.
- Integrity/Ethics: Deals with others in a straightforward and honest manner, is accountable for actions, maintains confidentiality, supports company values, communicates accurately and timely.

2) Job Specific Competencies:

- The position requires an individual who can maintain composure in a variety of situations.
- Teamwork: Works together toward a common goal.
- Communication: Possesses ability to convey information in a professional, precise, accurate, and easy-to-understand manner.
- Job Knowledge: Understands duties and responsibilities, has necessary job knowledge, has necessary technical skills, understands company mission/values, keeps job knowledge current, is in command of critical issues.

V. WORK ENVIRONMENT/PHYSICAL DEMANDS

- Work is generally performed in an office environment in which there is only minimal exposure to unpleasant and/or hazardous working conditions. Must have the ability to sit for long periods throughout an eight-hour period. Must be able to use a telephone or headset equipment.
- Must be able to lift as much as 20 pounds, perform work at a computer terminal for 6-8 hours a day and function in an environment with constant interruptions.

Any other duties or responsibilities management deems necessary as part of your position.

COPFCU is an Equal Employment Opportunity (EEO) employer and does not discriminate on the basis of race, color, national origin, religion, gender, age, veteran status, political affiliation, sexual orientation, marital status or disability (in compliance with the Americans with Disabilities Act) with respect to employment opportunities. Job descriptions are not intended and do not create employment contracts. COPFCU maintains its status as an at-will employer.