

JOB DESCRIPTION

Job Title: Member Service Representative/Electronic Transactions Supervisor

Reports To: Credit Union Manager

Supervises: None

Job Summary – Assist with all teller activities during busy times. (see Full-Time Teller job description). Assist members with all requests other than routine transactions. Maintain payrolls received from sponsor groups for deposit. Open new accounts and maintain and disburse all necessary disclosures for new accounts. Assist loan officer. Supervise electronic programs.

Duties and Responsibilities:

1. All duties and responsibilities as listed on the Full-Time Teller job description (copy attached) as needed in busy times.
2. Supervise and maintain Safe Deposit box program.
3. Open new accounts as requested from eligible persons. Verify eligibility through their employer or family member as applicable. Perform scan of OFAC list for possible matches to new member's name. Obtain and enter all pertinent information for member and any joint owner. Explain disclosures and member responsibilities associated with each account. Disburse all disclosures for each account opened.
4. Assist members with any problems, research member complaints and resolve or send to the manager.
5. Assemble signature cards of new members for board member signatures each month prior to board meeting. Prepare files for each member after board approves membership and file.
6. Follow up on any signature cards pending for any information.
7. Pull membership cards for any accounts closed each month and note month and year account was closed and file in a closed account file.
8. Supervise all ACH, Share Draft and ATM electronic transaction programs. Balance each file daily and make necessary general ledger entries for the daily files received. Prepare and send files for any return items(see instructions) Report any out-of-balance conditions for electronic files to the manager.
9. Balance and post payroll deduction remittances as received. Maintain files of remittances for five years on a rotation basis.
10. Verify any payroll deduction changes, new payroll deduction requests and send to proper payroll clerk. File copies with member account card and remove old form.
11. Supervise Debit card program. Order cards as requested by members. Place proper holds on the member accounts.
12. Balance, reset and replenish ATM daily. Balance all reports of ATM activity. Replenish ATM on Thursday morning or as needed.
13. Download ATM file monthly to clear file.
14. Check security dye packs monthly.

15. Assist members with automobile values in the absence of the loan officer.
16. Complete loans in the absence of the loan officer.
17. Assist manager in promoting credit union to existing and new sponsor groups.
18. Place orders for checks on member checking accounts as requested.
19. Work with tellers to arrange lunch breaks to ensure two tellers are available at all time.
20. Follow-up all returned mail attempting to locate a new address. Place mail hold on accounts if unable to obtain new address.
21. Maintain and issue new certificate of deposits.
22. Notarize forms as needed by members.
23. Assist with member requested wire transfers.
24. Any other duties as requested by the Manager.