

Member Support Professional I

GRADE	DEPARTMENT	JOB CLASSIFICATION	EEOC CATEGORY
6	Member Support Center	NonExempt	Administrative Support Workers

Role

Receive incoming calls via Phone andPTM (Personal Teller Machine) and provide direct support to the member; thereby creating a positive interaction with the member or potential member. The MSP will also be responsible for providing honest and open communication throughout the Credit Union and demonstrate behaviors that are consistent with the Credit Union's values and philosophies.

Major Duties and Responsibilities

Weight	Function	Essential?
1. 25%	Provide prompt, professional, financial service that exceeds expectations to all members and potential members that call via Phone or PTM.	✓
2. 25%	Perform teller functions that include but not limited to; account history look ups, stop payments, wires, quick money transfers, and debit card maintenance. Accurately process outgoing wire transfer requests from branches by keying the wire into wire software platform. Perform transactions via PTM to include but not limited to; deposits, withdrawals, and loan payments. Ability to recognize account holds, delinquent loans, and screen messages prior to completing transactions via Phone and PTM.	✓
3. 25%	Continually educate members and potential members on products and services that are beneficial to their financial needs. Provide accurate information using security measures in a timely and efficient manner.	✓
4. 10%	Ability to understand the lending and new account process to include but not limited to; credit card applications, consumer lending applications, and opening new accounts/shares, as it relates to cross sell opportunities.	✓
5. 10%	Ability to understand online banking and billpay to include; cross selling, setup, troubleshooting, and setting up e-statements. Ability to professionally correspond to member's online banking messages in a timely manner.	✓
6. 5%	When needed, assist other departments and branches with transactions to assist with members and in the daily operations of the Credit Union.	✓
7. —	Must comply with applicable laws and regulations, including but not limited to, the Bank Secrecy Act, the Patriot Act, and the Office of Foreign Assets Control.	✓

Knowledge & Skills

Experience

Six months to two years of similar or related experience, including time spent in preparatory positions.

Education/Certifications/Licenses

High school degree or GED required.

Interpersonal Skills

Courtesy, tact, and diplomacy are essential elements of the job. Work involves personal contact with others inside and/or outside the organization, generally regarding routine matters for purposes of giving and obtaining information, as well as advising or referring, which commonly require shorter discussions.

ADA Requirements

Physical Requirements

Perform primarily sedentary work with limited physical exertion and occasional lifting of up to 25 lbs. Must be capable of climbing / descending stairs in emergency situation. Must be able to operate routine office equipment including telephone, copier, facsimile, and calculator. Must be able to routinely perform work on computer for an average of 6-8 hours per day, when necessary. Must be able to work extended hours whenever required or requested by management. Must be capable of local travel as driver and travel by commercial airlines, rental vehicles and public transportation and be able to lodge in public facilities. Must be capable of regular, reliable and timely attendance.

Working Conditions

Must be able to routinely perform work indoors in climate-controlled shared work area with minimal noise.

Mental and/or Emotional Requirements

Must be able to perform job functions independently or with limited supervision and work effectively either on own or as part of a team. Must be able to read and carry out various written instructions and follow oral instructions. Must be able to speak clearly and deliver information in a logical and understandable sequence. Must be capable of dealing calmly and professionally with numerous different personalities from diverse cultures at various levels within and outside of the organization and demonstrate highest levels of customer service and discretion when dealing with the public. Must be able to perform responsibilities with composure under the stress of deadlines / requirements for extreme accuracy and quality and/or fast pace. Must be able to effectively handle multiple, simultaneous, and changing priorities. Must be capable of exercising highest level of discretion on both internal and external confidential matters.

Acknowledgement

Nothing in this position description restricts management's right to assign or reassign duties and responsibilities to this job at any time.

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. This job description is not a contract and should not be construed as a guarantee of employment for any specific period of time.

Infuze Credit Union is an Equal Opportunity Employer and does not discriminate against employees or applicants based on race, color, religion, sex/gender, national origin, disability, age, or any other category protected by law.

Authorized Representative

Date

Employee

Date

