Job Title: Student Member Service Representative
Reports To: Branch Manager
Status: Non-Exempt **Date:** June 2021

Position Summary: Responsible for being the "face" of CCU and welcoming members and non-members in a friendly and professional manner. Meets member's financial needs by providing exceptional, efficient service. Performs all duties in compliance with CCU policies and procedures.

Principal Duties and Responsibilities:

- Performs member transactions, including handling currency, basic deposits, withdrawals and payments, issuance of negotiable instruments and cash advances.
- Engages in meaningful and sincere interaction with members during transactions and/or at other times as needed.
- Maintains and balance cash drawer daily.
- Records, verifies, and processes mail and night deposit transactions, telephone transfers and stop payment requests.
- Responds to member inquires, requests, problems, or complaints and/or directs them to the appropriate person for specific information and assistance.
- Learns and keeps up to date on all CCU products and services.
- Educates members on products, services, fees, and policies; promotes and cross-sells CCU products and services based on member's needs.
- Performs scanning of a variety of documents on a regular basis.
- Any other duties as assigned.

Additional Duties and Responsibilities:

- Commits to CCU's mission, vision, and core values and model of Service Excellence. Lives and displays these values in all aspects of work and personal life.
- Keeps current in field by reading published information and attending authorized seminars and conferences. Occasional out-of-town travel.
- Participates in training sessions and online courses as needed.
- Participates in regularly scheduled departmental meetings and coaching sessions.
- Gets involved in professional and/or community activities to contribute to local community/profession and to be visible in the community.
- Represents the department on committees that may be formed and/or at various CCU events.
- Works on assigned Saturdays throughout the year.
- Depending on branch location, branch staff, and other factors, other job-related duties may be necessary to carry out the responsibilities of this position.

Performance Expectations:

- Greets all members in a friendly, professional, manner, including eye contact and a smile.
- Gives all members their full attention during each interaction; does not attempt to multi-task with other duties or transactions while helping a member.
- Demonstrates accuracy and thoroughness and promotes this attribute to all employees.
- Performs all duties in compliance with CCU policies and procedures.
- Complies with Bank Secrecy Act requirements; always maintain the integrity of our confidentiality policy.

- Maintains a positive, professional appearance and attitude with members and co-workers.
- Develops and maintains positive working relationships with other employees; promotes teamwork concept.
- Accepts work cheerfully.
- Maintains a neat workspace.
- Is punctual and reliable.
- Asks for help when necessary.

Knowledge, Skills, and Abilities:

- Cash handling or related financial background is preferred but not required.
- Basic mathematical skills.
- Basic computer skills, including Microsoft Office.
- Ability to operate general office equipment.
- Excellent communication, customer service, relationship building, and reasoning skills.

Work Relationships and Scope: Reports directly to the Branch Manager. This position interacts regularly with a range of co-workers and credit union members and non-members. Frequent access to confidential member information.

Working Conditions: Work is performed largely in a pleasant office environment with minimal chance for personal injury and moderate noise level. There may be occasions when the work environment is stressful. Work hours will normally be from Monday through Saturday and may change depending on our needs or due to special projects, deadlines, and other concerns. Physical requirements include the ability to stand for extended periods of time. Some walking, bending, stooping, and lifting of light materials is required. Frequent mental and visual concentration required for computer usage. Equipment that may be used includes copy machine, calculator, telephone, computer, fax machine, and other office and financial institution equipment.

Acknowledgment: This position description describes the general nature and level of work performed by the individual assigned to this positon and should not be interpreted as all inclusive. It does not state or imply these are the only duties and responsibilities assigned to the position. The employee may be required to perform other job-related duties. All requirements are subject to change and to possible modification to reasonably accommodate individuals with a disability.

This position description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the positon change.