

## **Support/Member Services Specialist**

TITLE: **Member Services**

REPORTS TO: Operations Manager

### *Purpose*

Perform limited transactional duties to serve members by receiving or paying out funds with high degree of accuracy. Maintain accurate transactional records, providing basic cash receipt and payment services in accordance with credit union policies and procedures.

### ***Duties and Responsibilities***

1. Greet and welcome members to the credit union in a courteous, professional and timely manner, providing prompt, accurate, and efficient member transactions.
2. Receive share drafts/checks and cash for deposit to accounts, verify amounts, examine share drafts/checks for proper endorsement, and enter deposits into computer records.
3. Cash share drafts/checks and process withdrawals; pay out money after verification of signatures and member balances.
4. Assist with mail or email transactions, when available.
5. Maintain an up-to-date and comprehensive knowledge on all credit union products and services that are handled or promoted by tellers. Maintain an up-to-date and comprehensive knowledge on all related policies and procedures, rules and regulations for the teller area, including robbery procedures.
6. Promote, explain, and cross-sell other credit union services such as consumer and mortgage loans, IRAs, certificates, safe deposit boxes, debit and credit cards, on-line banking, traveler's checks, and money orders.
7. Receive mortgage, consumer loan, and other payments, and ensure the payments match balances due. Enter payments into computer. Generate member receipts.
8. Place hold on accounts for uncollected funds.
9. Count, check, and package coins and currency.
10. Balance cash drawer at the end of the shift and compare totaled amounts to computer-generated proof sheet. Research and resolve discrepancies. Report any discrepancies to the supervisor as necessary.
11. Ensure that the teller station is properly stocked with forms, supplies, brochures, etc.
12. Report malfunctions of teller terminals and other equipment used at the teller station.
13. Check night depository bags and record proper information according to credit union procedures.