

HAYWARD COMMUNITY CREDIT UNION
1) MEMBER SERVICE REPRESENTATIVE

Reports to: Chief Operations Officer

Purpose: Responsible for opening accounts for new members, providing account information and professionally handling the members daily needs in person and by telephone.

Duties and Responsibilities:

- Assist with account activity to include: Opening new accounts; Closing accounts; Ordering and selling debit cards; Set up or reset online services
- Help with complex transactions and sensitive member relations problems
- Providing necessary information and disclosures to members
- Process new and renewal CD's
- Print monthly CD maturity notices, mail out on timely basis, maintain daily awareness of CD's coming due
- Provide in person and by telephone, general and specific information concerning Credit Union services or policies relating to member service
- Maintain knowledge of all state and federal regulations that are applicable to the transactions performed in the member service areas. Attend training sessions
- Assist with debit card program, especially selling and ordering cards for members
- Provide, in person and by telephone, general and specific information concerning Credit Union services or policies relating to member service
- Handle requests from members for transfers of funds or any other requests
- Be a resource for staff on the teller line when needed
- Provide information on investment alternatives to members wishing to deposit funds
- Assist members in balancing their accounts
- Obtain or create literature on services offered
- Submit orders and reorders of checks to check company
- Serve as a notary
- Check, record, and report all FinCen requests
- Process levies/garnishments and account verifications
- Scan account cards, levies, account verifications and other items needing scanned
- Make member cards for requests and for new accounts
- Research accounts for withdrawal and deposit discrepancies
- Process stop pays and wires
- Complete at least 16 hours of continuing education per year

Back-up Duties:

- Conduct tax levy submissions
- Process account verifications
- Scanning of documents
- CTR reporting
- Assist teller line when needed
- Assist members in entering their safe deposit box

MEMBER SERVICE REPRESENTATIVE CONTINUED

- Back up IRA specialist
- Back-up receptionist
- Create membership cards
- Process PBF file
- Handle debit card disputes

Summary:

The credit union Member Service Representative engages with members and prospective members in a positive and professional manner. The MSR also performs various duties that are directly member oriented but are duties that are completed without direct member contact.

Other:

Member Service Representative will perform these, and such other duties as may be assigned.

HAYWARD COMMUNITY CREDIT UNION 2) BRANCH TELLER

Reports to: Branch Manager/Teller Supervisor

Purpose: Provide basic cash and payments services in accordance with Credit Union procedures. Maintain a visible presence in teller area.

Duties and Responsibilities:

- Performs all teller duties to include: Greeting members; Account cash, check and transfer transactions; Cash drawer balancing; Processing payments
- Performs receptionist duties
- Performs member service duties
- Performs at least one Saturday shift a month
- Performs vault balancing duties
- Complete at least 16 hours of continuing education per year

Summary: The teller needs to interact with members in a personable and competent manner. The teller needs to be accurate and efficient in completing tasks.

Other:

Branch Teller will perform these, and such other duties as may be assigned.