



CCCU PURPOSE/MISSION

To serve Christ followers to live and give more abundantly

CCCU VISION

Build a community of Christ followers who transform our world through their lives and generosity

POSITION DESCRIPTION

CLASSIFICATION:	MEMBER SERVICE PROCESSOR
FLSA STATUS:	NON-EXEMPT
REPORTS TO:	ASSISTANT VICE PRESIDENT, MEMBER SERVICE VP, MEMBER EXPERIENCE & RELATIONSHIP DEVELOPMENT
DEPARTMENT:	MEMBER SERVICE – NEW ACCOUNTS
LOCATION:	SAN DIMAS
HOURS:	MONDAY – FRIDAY, 8:00am to 5:45pm; SATURDAY (rotating), 9:00am to 1:00pm (flexible 40 hours per week) Management reserves the right to modify the work schedule as necessary.

GENERAL RESPONSIBILITIES:

The primary responsibility of this position is to assist Christian Community Credit Union to live out its Purpose/Mission daily, in every member and/or staff interaction. This position is responsible for providing outstanding service in every service interaction.

PRINCIPAL ACCOUNTABILITIES:

- Utilize current systems to process online and mailed-in applications to grow membership
- Run appropriate scans for applications to ensure compliance with all regulations
- Contact and follow-up with members and applicants on open applications in a timely manner
- Use procedures and discernment when processing applications
- Provide quality member service through various channels with members and potential members
- Recognize and generate cross-sell opportunities for Credit Union growth and retention
- Distribute fax transmissions to the appropriate area
- Perform tasks associated with new account processing, account closures, and other account maintenance requests
- Enhance the Credit Union's reputation by accepting ownership for accomplishing new and different requests
- Resolve various issues by clarifying issues, utilizing available resources for researching and exploring answers, and suggesting alternative solutions
- Be aware of visitors entering the Credit Union; notify management if anything suspicious is observed or occurs, and implement proper security procedures, when necessary
- Represent Christian Community Credit Union with a professional image
- Promote team participation on a departmental and organizational level
- Maintain the privacy of our member accounts at all times
- Stay current and keep informed on all Credit Union products & services, policies, goals, and practices

- Be flexible as work hours could be changed as necessary to meet the needs of the Credit Union
- Demonstrate enthusiastic support of CCCU's purpose/mission, vision, values, & long-term objectives
- Meet or exceed the standard score on the annual product knowledge certification
- Meet or exceed sales and service goals as established by the Credit Union
- Comply with all regulatory requirements for financial institutions, including but not limited to Bank Secrecy Act, Anti-Money Laundering, USA Patriot Act, OFAC & Fair Lending Regulations
- Apply knowledge and comply with all Credit Union systems, bylaws, policies, and procedures
- Responsible for knowledge of Reg CC and Reg D
- Perform other related duties as assigned

Coverage as Needed - Duties include but are not limited to:

- Sort morning and afternoon mail
- Prepare mail for pickup and delivery to post office
- Mail UPS and Federal Express
- Pull statement copies, files, and signature cards
- Identify, assist with name badges, and direct members/visitors to the appropriate staff
- Process ATM/VISA Check Card requests for new cards, replacements, and deletions

REQUIREMENTS:

High School Diploma or equivalent required

Minimum two years of customer service experience required

Minimum one year of clerical work experience required

Knowledge of word processing (Word preferred) and spreadsheets (Excel preferred)

Banking experience preferred

Knowledge of credit union products and services preferred

Bilingual preferred (English/Spanish)

Ability to display an energetic outlook daily, representing the desired company image

Excellent interpersonal skills: courtesy, tact and diplomacy; personal contact with others inside and/or outside the organization generally giving or obtaining information

Ability to work on a personal computer

Ability to work under pressure in a fast-paced environment

Ability to deal effectively with multiple tasks and interruptions

Ability to give direction with confidence

Ability to work with supervision and follow instructions

Ability to prioritize and effectively manage time

Ability to sit and/or stand at a desk for extended periods of time

Ability to cross-sell services

Ability to embrace departmental/organizational changes

Continual cross training as required

Reliable transportation, valid driver's license, and current car insurance (when driving for Credit Union business)

Excellent organizational skills and attention to detail

Ability to communicate effectively in both verbal and written formats with individuals

Good telephone techniques: strong, confident, friendly voice with good diction

Good math aptitude

Accurate typing at 25 wpm

Ability to exercise confidentiality

Regular attendance and punctuality

Ability to work as part of a team

Professional appearance

Ability to lift 50 lbs. occasionally and 25 lbs. regularly

English literacy

This job description is to be used as an employee guideline. Management reserves the right to amend this job description if necessary.

Classification Specification for:

Member Service Processor, San Dimas

Physical Requirements - The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

While performing the essential functions of this job, the employee:	Occasionally (up to 3 hours per work day)	Frequently (3 - 6 hours per work day)	Regularly (more than 6 hours per work day)
Sits	X		
Stands		X	
Walks		X	
Bends neck or waist		X	
Twists neck or waist		X	
Stoops or kneels		X	
Uses hands to finger, handle or grasp		X	
Repetitively uses fingers	X		
Reaches, pulls or pushes below shoulder level		X	
Reaches, pulls or pushes above shoulder level	X		
Lifts and carries	Up to 50 lbs.		Up to 25 lbs.
Talks		X	
Hears		X	
Sees		X	
Drives a vehicle	X		

Work Environment - The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

Working Condition:	Description:
Mobility	High
Noise Level	Minimal
Hazardous	Minimal

Acknowledgment

I certify that I received a copy of this Classification Specification and I have read and understand what is required of me to meet the performance standards of the job.

Signature:	Date:
Name (Printed or Typed):	