

## Coastline Federal Credit Union Job Description

Job Title: Part-Time MSR Date: 02/04/2011  
Department: Retail Sales and Delivery Grade: 5H  
Reports To: Branch Service Manager Supervises: N/A  
Classification: Non-Exempt

### Role:

Performs member services, usually receiving payments, disbursing funds, opening checking accounts, posting deposits, providing account balances and related activities. Sells negotiable instruments and is responsible for the referrals of other services. Must keep accurate records of all transactions.

### Essential Duties:

- Responsible for meeting individual monthly referral goals
- Operates a cash drawer, paying and receiving cash on all types of teller transactions.
- Balances cash at established times.
- Reports overage/shortage to supervisor and takes appropriate steps regarding over/shorts
- Verifies completeness of all documentation and enters transaction in terminal.
- Balances entries to the system and prepares transmittal of work according to daily procedures.
- Sells money orders, giftcards and official checks and prepares daily reports on each.
- Disburses cash advances on Visa card using TeleCredit.
- Redeems US E and EE savings bonds as requested and enters corresponding bond information in the system. Completes reports as assigned.
- Relieves branches as assigned.
- Utilizes appropriate cross-servicing techniques to provide potential/current members with information regarding credit union products and services.
- Ensures compliance with BSA, OFAC and CIP and stays current with changes, industry trends and adheres to all Rules and Regulations. Complies with all policies and procedures regarding account disclosures.
- Actively participates in the goal setting and review phases of Performance Management Sessions.
- Account File maintenance duties, stop payments, ordering checks and other duties as assigned.

### Expectations

- To serve as a role model and front line liaison between membership and credit union.
- To drive the branch's financial performance in support of the credit union's goals.
- To support the credit union's Mission, Vision and Strategy in serving members and co-workers alike.  
To keep the designated management team informed of issues affecting the branch and/or credit union.
- To provide superior service to our members and create a valuable and relevant relationship as their primary financial institution.
- Provides weekly updates to the Branch Service Manager on referral goals, transactional related information, and the like.

### Knowledge and Skills:

Experience: One year of heavy cash handling experience preferred. Six months of heavy customer service experience preferred. Sales experience preferred.

Education: High school diploma or equivalency required.

Knowledge: Basic knowledge of PC use preferred. Knowledge of CU products and services preferred.

Other Skills &

Abilities: Must be able to work up to 25 hours a week, Monday through Saturday, shifts may vary. Must have excellent listening, verbal and written communication skills. Must be able to establish and maintain a positive, professional, CU image to members and coworkers. Must be able to effectively cross-service CU products to potential/ current members. Must be able to maintain a high level of concentration over a large volume of highly detailed work. Must have accurate mathematical and number recognition skills. Must be able to fully use office equipment. Must be able to effectively organize and coordinate work for self and any co-workers involved in work/projects. Must be able to make consistent, logical, independent judgment in carrying out responsibilities. Must be able to stand for extended periods of time. Must be able to take direction. Must be bondable.

This Job Description is not a complete statement of all duties and responsibilities comprising this position.