



JOB DESCRIPTION

Title: MSR I

Reports to: Teller Manager

Purpose: This position will continually assist the credit union in delivering its Service Mission to the members: “We will help our members achieve financial success” by providing high quality service both internally and to the members. This position will also provide quality member service by performing financial transactions and cross servicing credit union products and services to meet the members’ needs, understand and comply with all state and federal regulations and laws, and ensure compliance with all governing regulations, especially Bank Secrecy Act requirements. Note: Bank Secrecy Act knowledge will be determined by position and responsibility. Currency Transaction Reports and monitoring and reporting as appropriate any suspected suspicious activity.

SERVICE PROMISES

- I promise to treat you with the highest standards of respect and professionalism.
- I promise to make it easy to do business with us.
- I promise to ensure the security of your financial information.
- I promise to be knowledgeable regarding your request.
- I promise to respond to your requests in a timely manner.
- I promise to deliver accuracy in all of my work.
- I promise to identify your needs and suggest a solution that will improve your financial life.

DUTIES AND RESPONSIBILITIES

- 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.
- Cash share drafts/checks and process withdrawals; pay out money after verification of signatures and member balances.
- Promote and explain other credit union services such as safe deposit boxes, cashier’s checks, money orders, Members Financial Services, VISA, Business Development Services, etc.
- Receive mortgage, consumer loan, and other payments and ensure the payments match balances due. Enter payments into computer. Generate member receipts when necessary.

- Count and check currency by roll. Crack coin and bag for shipment.
- Balance cash drawer at the end of the shift (to include money orders, and “on us” checks) and compare totaled amounts to computer-generated proof sheet. Report any discrepancies to the supervisor as necessary. In case of discrepancy, balance all teller slips and receipts.
- Ensure that the teller station is properly stocked with forms, supplies, etc.
- Report malfunctions of teller terminals and other equipment used at the teller station to supervisor.
- Balance transit checks, scan, and batch and verify against totals.
- Collect and band all recaps and place in locked recap cabinet.
- Periodic review of WCCU Product Manual, CU Promotions, Policies and Procedures
- Daily shredding of all confidential information.

DESIRABLE PC SKILLS

Basic keyboard knowledge

DESIRED EDUCATION/EXPERIENCE

High school graduate

BEHAVIOR STANDARDS

- Sincere friendliness
- Patience with difficult members
- Communicate clearly, present product and services
- Cooperative personality
 - ✓ Team Player
 - ✓ Pitch in whenever/wherever
- Flexibility/Willingness to change as job and daily schedule changes
- Thorough knowledge of products and services
- Recognition of members, greet with a smile and use members name when possible
- Accuracy with transactions
- When member leaves, must say “Is there anything else I can do for you?” “Have a good day”, “Have a nice week end”, etc.