

Traveling Service Representative

Location: Must travel to all ACU locations as directed; must be flexible for last minute changes to schedule and location

Status: Full-Time

Hours: 40 hours per week

7:45 AM - 6:15 PM Monday-Friday

8:45 AM - 1:15 PM Saturday

Reports to: TSR Supervisor

Description of Position:

Identify member needs and assists members and potential members with those needs; explains services, receipts/disburses funds for member transactions, sets up new accounts, and responds to problems in a timely manner.

Qualifications:

Required:

- High School Graduate
- Working knowledge of Microsoft Windows, Outlook, Word, and Excel
- Strong positive interpersonal skills with sincere desire to provide exceptional service
- Good keyboarding skills, ability in math, data entry, and accurate cash handling procedures
- Able to work without close supervision
- Able to successfully cross-sell credit union products and services
- Must be flexible regarding work locations, hours, and duties which may change frequently with little to no notice

Preferred:

- Associates Degree
- Two year customer service - credit union preferred
- Previous cash handling experience
- Familiarity with credit union's products, services, polices, and procedures

Job Duties:

1. Provides general information to members about credit union financial products and services. Proactively explains features and benefits in accordance with credit union policy, standard procedures and regulations.
2. Serves as primary communication contact with members. Assists members regarding problems and inquires related to transactions on their accounts. Performs face to face interviews for loans, deposit accounts, and other products and services.
3. Performs all loan processing and closing functions including input applications, pull credit reports, gather collateral documentation, reviews for completeness, passes to loan officer for review, presenting decision or denial letters on loan requests that have been denied.

4. Works effectively with all other departments to resolve members' inquiries in a timely manner. Assists all departments by supporting group effort to provide the best member service possible.
5. Actively cross-sells credit union products and services and enthusiastically participate in all marketing promotions.
6. Accurately performs data entry of loan, share, and credit union service documentation accurately, as necessary and is able to research all member related problems. Follows through to resolution of problems.
7. Capable of developing sound solutions and making on-the-spot decisions, which compliments the need for efficient, accurate and appropriate member service. Works well under pressure and considers acceptable alternatives.
8. Operates on-line teller terminal and processes transactions directly related to the receipt and disbursement of funds. Is responsible for accuracy of all transactions.
9. Balances cash drawer and daily totals to data processing totals. Is responsible for accuracy of all detail.
10. Orders daily cash from vault and verifies amount. Images checks for end of night branch deposit recap.
11. Provides Visa cash advances, traveler's cheques, and money orders. Completes data entry of miscellaneous receipts to cash journals.
12. Participates in appropriate training and receives necessary education to remain competent in all service areas, as well as trains others and learns new tasks which enable job rotation as required by ACU Internal Controls.
13. Other duties as assigned.

Standards of Performance:

Demonstrates excellent knowledge of all credit union products and services. Responsible for timely, accurate processing of members' requests for loan and share products as well as all services offered by the credit union. Demonstrates a thorough understanding of the credit union's data processing system as well as all current computer applications used to complete members' requests. Ensures confidentiality of member information and professional delivery of quality service. Demonstrates a professional appearance, attitude, and demeanor at all times.

Physical Requirements:

Task	Time
Stand	To 2/3 of time
Walk	Under 1/3 of time
Sit	Over 2/3 of time
Computer use including typing, navigating a mouse, reading the screen, etc.	Over 2/3 of time
Use hands/fingers to handle/feel office supplies, paper, etc.	Over 2/3 of time
Reach with hands and arms	Over 2/3 of time

Talk, hear* and read	Over 2/3 of time
Lift up to fifty (50) pounds	Under 1/3 of time
Close vision* - clear vision at 20 inches or less	N/A

* with or without corrective devices