



## Position Description

### **Job Title: Support Services Representative**

Position/FLSA Status: Full-time/Non-Exempt  
Department: Operations  
Reports to: President  
Location: 17330 State Highway 371 Brainerd MN 56401  
Date Issued: November 2016  
Date Revised: September 2024

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**Summary:** Provide account and service information to members, processing ACH, Draft and ATM exceptions, monitoring online applications and light accounting. Back up teller staff, assist members with new and existing accounts.

### **Responsibilities:**

#### *Support Services*

- Represent the credit union to members in a courteous and professional manner and provide prompt, efficient and accurate service
- Respond to member's requests, problems, complaints, and/or direct them to the proper person
- ACH – Process exceptions, returns and corrections. Notify members of NSF and returns. Balance GL daily
- Drafts – Process exceptions, returns and balance GL daily
- ATM/debit cards – balance GL daily, investigate fraud alerts, process card capture and account charge backs. Order replacement cards
- Power Teller – Monitor reports, update email addresses, link accounts, respond to member emails or refer to others
- Mobile Deposit – Monitor deposits, verify correct amounts are posted to member's account
- Balance the corporate checking account
- Process returned checks (QRC)
- Review negative accounts weekly and contact members to make deposit
- Calculate, post and scan savings bonds for redemption
- Scan, index and verify CWPCU documents
- Youth Marketing – Mail birthday packets and assemble gift bags
- Order and verify cash shipments from the Federal Reserve
- Prepare coin/cash shipments back to the Federal Reserve
- Verify all cash drawers and vault coin at least once monthly
- Buy or sell cash to tellers as needed.
- All duties assigned to teller – Back up teller staff
- Open and close Member Accounts and Certificates of Deposit
- Other duties as assigned

### **Knowledge, Skills, and Abilities**

- Basic knowledge of financial institution rules and regulations
- Be able to adapt quickly to unpredictable situations
- Ability to pay close attention to detail
- Knowledge of Microsoft Office Suite and other computer-related software and office equipment
- Communication skills to speak clearly, listen and get clarification, respond well to questions and participate in meetings
- Time management skills to organize workload and meet deadlines

### **Education/Experience Requirements**

- One (1) year minimum experience at a financial institution
- Possess the qualifications, experience and skills deemed appropriate by Management

### **Basic Requirements**

- Hold a valid driver's license in the state of Minnesota
- Take initiative on projects and hold oneself accountable for workload with minimal supervision
- Manage stress related to work events

### **Physical Requirements**

- Withstand sitting or standing for long periods of time while looking at a computer screen
- Occasional bending, reaching, and light to medium lifting