

Lehigh Valley Educators Credit Union
Position Description

Title:	Call Center Representative	Classification: Non-Exempt
Department:	Call Center	Supervises: N/A
Supervisor's Title:	Call Center Supervisor	
Reports to:	Call Center Supervisor/Branch Manager	

Purpose: Provide information concerning the credit union and the services available to members. Answer member questions relating to account inquires and accessing account online.

Duties & Responsibilities

1. Serve membership by providing service and information in a pleasant, efficient manner via telephone or correspondence including:
 - a. researching and solving member questions, problems, and complaints concerning credit union accounts
 - b. verify accounts
 - c. cross sell credit union services
 - d. answer questions regarding share accounts, share drafts, VISA credit and debit cards, IRA's, share certificates, and bill pay
 - e. Process stop payments for share drafts and ACH bills
 - f. Process check reorders, payroll changes, VISA payments, VISA cash advances and photocopy request
2. Assist members with basic questions regarding their loans, process loan letters and online loan applications
3. Assist with return mail, opening branch, balancing ATM, and verifying cash shipments
4. Assist members with home banking (e-Tran) and "ART".
5. Mail information to members and prospective members.
6. Responsible for researching member inquires to ensure proper follow up and satisfaction.
7. Keep all credit union members and employee related business in strictest confidence.
8. Treat all credit union members and employees with a positive and cooperative attitude.
9. Cross sell credit union products and services.
10. Perform other functions as required by the supervisor.
11. Willingness to learn about credit unions by participating in self-study courses such as CUNA Professional Development (CPD), CUNA training bundle and/or other educational opportunities that arise.

Performance Measurements

Department functions are conducted in accordance with established principles, standards, and legal requirements. Department personnel are effective and efficient. Positive relations exist with members, employees and vendors. Good coordination and effective working relations exist with other departments. Assistance is provided as needed.

Education/Certification/Experience:

A high school diploma or general education degree (GED) required with a minimum of two years' experience in a bank or credit union environment. Additional education may be required and will be considered as part of the annual performance evaluation process.

Skill Sets Required:

Ability to read, analyze, and interpret credit union policies and procedures; Strong interpersonal skills, attention to detail, organization and time management skills are a must. Ability to effectively present information to members. Strong oral and written communication abilities required.

Physical Activities and Requirements of This Position:

Finger Dexterity: Using primarily just the fingers to make small movements such as typing, picking up small objects, or pinching fingers together.

Talking: Especially where one must convey detailed or important instructions or ideas accurately, loudly, or quickly.

Repetitive Motions: Movements frequently and regularly required using the wrists, hands and/or fingers.

Average Hearing: Able to hear average or normal conversations and receive ordinary information.

Average Visual Abilities: Average, ordinary visual acuity necessary to prepare or inspect documents or products, or operate machinery.

Physical Strength: Standing and sedentary work. Standing most of the time; however, sitting is an option. Exerts up to 10 lbs. of force occasionally.

Working Conditions

None: No hazardous or significantly unpleasant conditions.

Mental Activities and Requirements of This Position

Reasoning ability: Ability to apply common sense understanding to carry out detailed but uninvolved instructions and to deal with problems involving a few variables.

Mathematics Ability: Ability to perform basic math skills and use decimals to compute ratios.

Language Ability: Ability to use passive vocabulary of 5,000-6,000 words; read at a slow rate; and define unfamiliar words in dictionaries for meaning, spelling and pronunciation. Ability to write complex sentences, using proper punctuation, and using adjectives and adverbs. Ability to communicate in complex sentences, using normal word order with present and past tenses and good vocabulary.

Intent and Function of Job Descriptions

Job descriptions assist organizations in ensuring that the hiring process is fairly administered and that qualified employees are selected. They are also essential to an effective appraisal system and related promotion, transfer, layoff, and termination decisions. Well-constructed job descriptions are an integral part of any effective compensation system.

All descriptions have been reviewed to ensure that only essential functions and basic duties have been included. Peripheral tasks only incidentally related to each position have been excluded. Requirements, skills, and abilities included have been determined to be the minimal standards required to successfully perform the positions. In no instance, however; should the duties, responsibilities, and requirements delineated be interpreted as all-inclusive. Additional functions and requirements may be assigned by supervisors as deemed appropriate.

In accordance with the Americans with Disabilities Act, it is possible that requirements may be modified to reasonably accommodate disabled individuals. However, no accommodations will be made which may pose serious health or safety risks to the employee or others or which impose undue hardships on the organization.

Job descriptions are not intended as and do not create employment contracts. The organization maintains its status as an at-will employer. Employees can be terminated for any reason not prohibited by law.

This job has no supervisory responsibility.

Disclaimer:

The above information on this description has been designed to indicate the general nature and level of work performed by employees within this classification. It is not designated to contain or be interpreted as a comprehensive inventory of all duties, responsibilities and qualifications required of employees assigned to this job. By signing this form, you are not entering into a contract or agreement with the credit union for any length of time.

Signature of Employee: _____

Date: _____

Signature of Supervisor: _____

Date: _____

Signature of CEO: _____

Date: _____

(09/2019)