



# Denver Municipal Federal Credit Union

Job Description: **7010**  
**Phone Center Representative I**

Date: August 1996

**Reports to:** Service Center Supervisor

**Objective:** To routinely perform as a primary public contact to members by telephone and other telecommunication methods, including the internet. To act as an accurate and timely information resource to members, taking the initiative to assist members with their financial needs regarding the daily receipt of loan payments, share withdrawals, new member activity, credit union services, policies and procedures, and other needs or interests, as required or requested.

**Essential Responsibilities:**

1. Performs as a primary public contact to members by telephone and other telecommunication methods, including the internet. Acts as an accurate and timely information resource to members, taking the initiative to assist members with their financial needs regarding the daily receipt of loan payments, share withdrawals, new member activity, credit union services, policies and procedures and other needs or interests, as required or requested.
2. Receives and processes various financial transactions within established standards for accuracy and timeliness, as required or requested, including: payroll deduction forms; new accounts and changes to existing accounts; name, address and other changes; returned mail; completion of loan worksheets, as required; account research and special services transactions; and *Tellerphone* applications.
3. Completes, thoroughly and accurately, signature cards, loan files and all member correspondence on a daily basis or, as authorized.
4. Provides training, cross-training, technical direction and guidance to Teller Service Representatives, staff and members, as required or requested.
5. Performs as back-up and additional staff support to Teller Service Representatives, Phone Center Representatives and for general staff scheduled and unscheduled absences.

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6. Maintains privacy/security of member information through positive identification of phone center callers. Complies with established security policies and procedures.
7. Maintains a clean and safe work environment.
8. Performs other related duties, including special projects, as required or requested.

**Qualifications:**

**Education/Experience:** Education equivalent to graduation from High School, and one (1) or more years of recent and related work experience with a demonstrated knowledge of credit union policies and procedures. Demonstrated consistency in accurately handling cash, and reviewing, evaluating and recording financial transactions on a daily, weekly, monthly, quarterly and annual basis. A general accounting knowledge is desired. Previous teller experience, preferably at a senior level, is desired. Must be able to work flexible hours. Must be bondable.

**Performance:** Demonstrated experience performing in compliance with established human resource and departmental policies regarding: attendance (absences, tardiness, sick leave and vacation use, and other scheduled or unscheduled absences); dress code; customer/member services; safety; security, disaster and other policies procedures and practices. Demonstrated effective and diplomatic oral and written communication skills. Performance is limited to the scope of essential duties and responsibilities.

**Physical/Environmental Characteristics:** Essential duties are performed in a general office work environment and regularly require sitting at a work station/desk while completing paperwork or using computers, calculators, copiers, fax machines and other business office machines and equipment. Essential duties may also involve: occasional kneeling, squatting, bending, walking, crouching, stooping and lifting up to 30 pounds to stack, store supplies or various office equipment, as directed. **Compliance to security and safety procedures, including use of Personal Protective Equipment (PPE), is required.**