

## **RIPCO CREDIT UNION**

### **Job Description**

**JOB TITLE:** Help Center Representative  
**DEPARTMENT:** Office Operations  
**CLASSIFICATION:** Non-exempt  
**REPORTS TO:** VP of Office Operations

#### **POSITION SUMMARY**

Provide information and member support concerning the Credit Union and its products and services to Credit Union members, ensuring the highest quality of member service.

#### **QUALIFICATIONS/EDUCATION**

- High school diploma or equivalent
- Experience in the financial industry a plus
- Professional appearance and demeanor

#### **KNOWLEDGE/SKILLS/ABILITIES**

- Strong interpersonal skills
- Excellent oral and written communication skills
- Analytical abilities and problem solving skills
- Ability to handle multiple tasks and prioritize workload
- Proficient computer skills
- General knowledge of office machines (fax, copier)

#### **DUTIES/RESPONSIBILITIES**

- Serve membership by providing service and information in a pleasant, professional, and efficient manner via telephone or correspondence.
- Research and solve more complex member questions, problems, and complaints concerning Credit Union accounts.
- Continuously check help center voice mail and reply to these calls accordingly.
- Close accounts, verify accounts, process stop payments, and answer questions regarding share accounts, share draft accounts, credit cards, debit cards, and ATM cards.
- Cross-sell Credit Union products and services when appropriate.
- Assist members with basic questions regarding their loans.
- Assist members with remote access.
- Mail, fax, or e-mail information to members and prospective members when requested.
- Responsible for researching member inquiries to ensure proper follow up and satisfaction when given the call.
- Ensure that all Credit Union members and employee related business is kept in the strictest confidence.
- Treat all Credit Union members and employees with a positive and cooperative attitude.

- Use and explain Loan Pay Xpress for member loan payments.
- Kwik cash and HELOC loan disbursements/transfers.
- Communicate with members on Zip Whip to help them with their questions/needs.
- May cross-train or assist in cross-training other call center representatives.
- Transfer calls to appropriate person if misdirected to help center.
- Handle wrong address reports.
- Any additional duties as assigned.

#### **PHYSICAL DEMANDS/REQUIREMENTS**

- Standing, walking, sitting, finger and hand dexterity, average hearing, average visual acuity.  
Ability to converse.

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Employee's name (printed)

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Supervisor's name (printed)

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Employee's signature                      Date

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Supervisor's signature                      Date