



## **Job Description – Clerical Officer (Member Services Officer)**

### **Role Summary**

The Clerical Officer's (Member Services Officer's) main responsibilities will be to work as part of a team providing administrative support for the provision of member services. The Clerical Officer will also contribute to the smooth operation of the Credit Union by undertaking related administrative and organisational tasks.

### **Key Responsibilities**

- Provide administration support for a range of different member services including loans, savings, current accounts, deposit accounts and insurances
- Process transactions on members' accounts
- Post information as appropriate to member accounts
- Set up membership and sub accounts on the system of record
- Assist with the administration of member payroll deductions
- Assist members with setting up EFT, Direct Debit and Standing Order payments
- Assist members complete relevant loan documents making them aware of the conditions of the agreement and of their consumer rights.
- Payout loans to members ensuring all pre-conditions have been fulfilled
- Act as teller/cashier including balancing own till and float daily
- Deal with over the counter/telephone inquiries courteously and efficiently
- Direct members to other credit union personnel as appropriate
- Issue documentation and items of general information to members and non-members as directed/required
- Take reasonable steps to ensure that where possible any problems are solved on the day on which the problem arises
- Ensure you have a full awareness and understanding of all products offered by the Credit Union to the extent that you could identify when they might suit a member's requirements, be confident to promote them to members and be able to answer any questions surrounding the product.
- Prioritise tasks according to urgency
- Deal with all filing/scanning of correspondence, member documentation etc.



- Ensure all documentation is signed where required
- Ensure member information is accurate and kept up to date.
- Manage communication in an accurate and efficient manner as required
- Open and distribute post

### **Other Responsibilities**

- Participates in and assists with scheduled member events such as the Annual General Meeting and scheduled promotional and sponsorship events such as Credit Union Day and Members' Open Days/ Evenings
- Promotes credit union philosophy at all times with members
- Takes responsibility along with all staff for training new staff members, voluntary workers, and board members, thus ensuring they become familiar with all aspects of Credit Union activities
- Works at all times in a courteous, friendly, and professional manner, preserving confidentiality and adhering strictly to all set policies and procedures of the Credit Union
- Completes other duties as assigned, including a range of administrative and organisational tasks as delegated by the Operations Manager

### **Individual Compliance Responsibilities**

In carrying out his/her duties on behalf of the Credit Union the Clerical Officer must maintain a thorough knowledge of and comply with the policies and procedures of the Credit Union. The successful candidate must be willing to satisfy the Minimum Competency Requirements of the Central Bank's Minimum Competency Code or be working towards a relevant qualification e.g. APA Loans.

### **Main Performance Measures**

- Quality of service delivery to members; member feedback
- Quality of administrative service provided in the office
- Success in assisting to resolve any service bottlenecks or backlogs
- Quality of support, advice, and training delivered to colleagues and volunteers
- Teamwork and contribution to the smooth and efficient running of the Credit Union overall

Ends.