



JOB TITLE: Call Center

DEPARTMENT: Operations

REPORTS TO: Operations Manager

SCHEDULE: Vary according to each branch, including evening hours and/or weekends.

OBJECTIVE:

The UKRFCU Call Center, whether in person or via phone, is the first point of interaction most people have with the UKRFCU. The individual is expected to provide quality and professional service in greeting and assisting members, staff, and guests of the UKRFCU.

The Call Center is responsible for the answering of internal or external communications by phone/computer and proper prioritization and allocation to the appropriate party. A consistent level of accuracy of information and confidentiality of private information for all communications is critical for the duties of the Call Center. The role also includes providing support in a fast paced, high call volume office environment and will assist in completing operational and data entry tasks as necessary in a timely and accurate manner.

Responsibilities and Expectations:

1. Answer all incoming telephone calls; determine purpose of calls, and forward calls to appropriate personnel or department, and take messages.
2. Provide information to callers; respond to all telephone inquiries about products and services, hours of operation, and general inquiries.
3. Perform teller transaction for members via telephone and in person as needed. Assist members with account inquiries on their accounts.
4. Greet visitors, determine nature of their business, and guide visitors to appropriate personnel.
5. Knowledgeable in all credit union products and services.
6. Monitor visitor access and maintain security awareness.
7. Provide general administrative and clerical support.
8. Prepare correspondence.
9. Process returned mail.
10. Receive and accurately sort mail and deliveries; and deliver all incoming mail to the proper recipient.
11. Prepare all outgoing mail and ensure mail is stamped correctly and is picked up by the mail service. This includes UPS and certified mail. Schedule UPS pickups.
12. File Credit Union check stubs and money orders in order when received at end of day.
13. Mail Share Certificate (Certificate of Deposit) maturity and renewal notices on a timely basis.

14. Schedule appointments, maintain appointment diary either manually or electronically.
15. Ensure the work area is properly stocked with supplies and forms. Maintains clean and safe work area.
16. Process wire-transfer forms.
17. Handle confidential information.
18. Adhere to all corporate and departmental policies and procedures.
19. Ability to work with minimal direction and exercise sound judgment.
20. Required to participate in all credit union training programs. Follows policies and procedures daily to ensure compliance with current regulations.
21. May be required to participate in credit union committees, including but not limited to marketing, compliance, IT.
22. Performs basic clerical tasks as assigned by manager, including but not limited to: filing, scanning, photocopying, faxing.

QUALIFICATIONS:

Education/Experience: A High School diploma or equivalent.

Other:

- Ability to communicate effectively, both orally and in writing, with members and employees.
- Excellent attention to detail and organizational skills with ability to perform expeditiously and accurately without constant supervision and frequent interruption.
- Must have excellent conflict resolution skills.
- Ability to multitask under pressure.
- Must have technical aptitude.
- Ability to learn all aspects of the credit union.
- Basic knowledge of Word processing and spreadsheet applications.
- Being a team player that is considerate of other employees.
- Maintains a professional appearance and demeanor.
- Must demonstrate self-initiative skills.
- Bilingual: must be fluent in English and Ukrainian.

Language Skills:

Ability to respond to common inquiries or complaints from members, regulatory agencies, or members of the business community. Ability to read and interpret business documents. Ability to effectively present job related information to employees.

Physical Requirements:

The physical demands described are representative of those that must be met by an employee to successfully perform the essential functions of this job. Must possess sufficient manual dexterity to skillfully operate standard office equipment including but not limited to: a computer, scanner, adding machine, facsimile machine, photocopier, and telephone. A telephone device to enhance hearing will be provided if

needed. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is occasionally required to stand; walk, sit; use hands to finger, handle or feel objects, tools or controls; reach with hands and arms; climb stairs; balance; stoop, kneel, crouch or crawl; talk, hear or smell. The employee must occasionally lift and/or more up to 30 pounds.

Availability Requirements:

Must maintain regular and acceptable attendance and be available to work your normal scheduled hours per week or such hours per week as UKRFCU determines necessary to meet the member's needs.

Work Environment:

Work environment characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Employees must be able to relate to other people beyond giving and receiving instructions: (a) can get along with co-workers or peers without exhibiting behavioral extremes; (b) perform work activities requiring negotiating, instructing, supervising, persuading or speaking with others; and (c) respond appropriately to criticism from a supervisor. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.