

Job Title	Operations Support Representative
Short Description	Provide administrative and analytical support for front line Retail Services operations.
Full Description	<p>Position Description</p> <p>Department: Retail Services Reports to: Operations Support Manager Skill Levels: Level I</p> <p>Position Purpose</p> <p>The primary purpose of this position is to assist Associated Credit Union in living out its Mission: To offer members financial products that fulfill their needs, service that exceeds their expectations, and relationships that inspire their trust.</p> <p>The primary purpose of the Operations Support Representative position is to provide administrative and analytical support for front line Retail Services operations. One of the key roles is the quality control review and analysis of documents or reports associated with deposit accounts and Safe Deposit Boxes to ensure that Associated Credit Union follows all rules and regulations for the identification and documentation of new accounts, products, and services. Another key role for this position is the administration of the Individual Retirements Account (IRA), Health Savings Account (HSA), and Safe Deposit Box programs. This role will adhere to all credit union policies, procedures, and overall regulatory guidelines and rules.</p> <p>Essential Functions & Core Duties</p> <p>Member Experience</p> <ul style="list-style-type: none">• Provides outstanding service to internal and external members as well as internal support to frontline Retail Services associates.• Promotes, represents, and welcomes a collaborative working environment.• Exudes a positive working environment with a can-do attitude which fosters our Mission, Vision, Values, and Service Standards. <p>Maintain Operational Soundness</p> <ul style="list-style-type: none">• Performs quality control (QC) reviews and analysis on new member account documentation and transactions for accuracy.• Performs a sample QC audit of new member accounts (i.e. assure all documentation was received and retained, verify all areas within MeridianLink were properly completed, Customer Identification Program (CIP) is adhered to, etc.)• Follows up and tracks progress of branches in addressing the specific QC audit findings.• Accountable for indexing and performing quality control analysis on imaged items in Synergy Capture.• Assists with day-to-day processing, operations, direction and administration of IRA and HSA accounts.• Responsible for maintaining IRA/HSA records and research to

maintain accuracy and required compliance.

- Responsible for setting up and maintaining Required Minimum Distribution (RMD) via requests received by a branch office or mail ensuring the RMD is properly recorded and disbursed via check or ACH.
- Pulls RMD reports monthly, review the reports to determine RMDs to be processed and process transactions in Symitar.
- Logs in to Ascensus daily and Approve/Deny forms that are in pending status by reviewing the member's account.
- Ensures forms listed in Ascensus are also in imaging under the member's account information.
- Verifies that the member information, including the IRS record, matches the information in Ascensus.
- Ensures daily, monthly, and annual IRA/HAS tasks are performed timely and in accordance with current rules and regulations.
- Supports the IRS reporting processes including tax reporting, maintaining tax records for existing members and associated activities.
- Provides support for annual tax and government reporting processes (i.e. Backup Withholding).
- Administers the credit union's Safe Deposit Box program, including lease management, member notifications, and fee posting.
- Maintains open lines of communication with Retail Services management regarding area activities and of any significant problems.
- Exercises good judgement while keeping the credit union's best interest in mind. Understands when to seek management approval for any exception to set policies or procedures.

Explore Operational Efficiencies

- Analyzes current processes, identify process gaps, recommend changes or technology enhancements, train staff, and implement improvement opportunities/
- Works with all areas of Retail Services as well as other business units to create and maintain workflows.
- Ensures Retail Services is utilizing their systems correctly and as efficiently and as cost effective as possible.
- Documents workflows through appropriate visualization tools and various business process scenarios (i.e. journey mapping, process maps, rules matrices, mockups, etc.).
- Develops measurable process improvement goals and objectives and monitors progress.

Other Duties & Responsibilities

- Actively participates in Departmental huddles, individual and group coaching/training sessions.
- Maintains comprehensive and up to date knowledge of banking regulations related to assigned job function. Complete or ensure all audit and security policies and procedures are followed in accordance with credit union policies and Federal regulations. Complete required compliance and job specific training. Familiarity and adherence of all Bank Secrecy Act requirements including the ability to identify and properly report fraudulent and suspicious activity.

- Scanning and file maintenance tasks are appropriately processed and completed.
- Assists with audits or special projects as assigned.

Qualifications

Education: A high school diploma or equivalent is required. An Associate's Degree from an accredited college is desirable.

Experience: One-year of prior banking or relevant customer service experience is preferred. Must be proficient with the Microsoft Office Suite (Word, Excel, and Outlook) or similar software programs. Knowledge of Jack Henry's Symitar – Episys, Synergy, or Ascensus is a plus.

Core Competencies:

- Integrity: operate with complete transparency, and hold ourselves to high ethical standards. Act in the best interest of our membership, staff, and community, even when no one is watching.
- Committed: desire to make an impact in people's lives. We develop relationships that make a positive difference in the financial lives of our members, team members, and community.
- Accountability: ability to hold self and others accountable for achievement of key results and to persevere through challenges, setbacks, or difficulties. We own, we learn, and we improve.
- Operational Soundness: thorough in-depth knowledge of Credit Union products and services and familiarity with Retail Services functions, policies, and procedures.
- Time Management: effectively prioritizes tasks to use time efficiently and attend to a broad range of activities. Ability to manage work efficiently and effectively and manage shifting priorities and carry-on through task completion.
- Attentiveness to Detail: demonstrates keenness while exploring the issue or topic at hand as well as issues surrounding it and reasons behind it. Takes thoroughness to a new level and energizes other colleagues to work carefully.
- Teaming: ability to work well with your retail team and other business units to achieve a shared goal or outcome in an effective way.
- Communication/Interpersonal Skills: clearly understand what the Manager wants, and then articulate that to other team members. Clearly explain points of view to members when unusual or complicated issues arise. Maintain good business writing skills and active listening. Ability to read and understand documents such as policies and procedures, operating and maintenance instructions.
- Problem Solving: identify problems in a timely manner, research and develop alternative solutions, and resolve problems in early stages. Must be capable of breaking problems into component parts and addressing each individual issue in order to develop an appropriate thorough solution.
- Organizational: ability to stay focused on different tasks, and use your time, energy, strength, and mental capacity effectively and efficiently in order to achieve the desired outcome.
- Reasoning: ability to apply common sense understanding to carry out detailed but uninvolved instructions and to deal with problems

involving few variables.

- Technical: ability and practical knowledge of processes and technology. Ability to input and retrieve computerized information.

General Operational Requirements:

- Work is performed largely in a pleasant office environment.
- Ability to work a flexible work schedule including mornings, evenings, weekends, and holidays.
- Combined sitting, standing, and moving throughout the workday to accomplish tasks or engage the membership and team.
- Must be able to bend, turn, twist, lift, and move up to 30lbs of office supplies, equipment, and coin.

Education	High school diploma
Additional Comments	
Credit Union	Associated Credit Union
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Expiration Date	11/30/2022