

## JOB DESCRIPTION

**Position:** Operations Service Representative, Clearing Clerk  
**Reports to:** Assistant Manager

**Group:** 2

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### **Primary Responsibility/Basic Purpose:**

Under general supervision, the Operations Service Representative, Clearing Clerk processes a variety of financial and non-financial transactions of an administrative nature. Coastal Community strives “to be the leaders in building relationships that improve financial health, enrich people’s lives and build healthier communities.” It is the responsibility of the Operations Service Representative to carry the vision statement forward in order to build, maintain, attract and expand the member’s relationship with Coastal Community. The Operations Service Representative provides friendly, professional service in an efficient and financially responsible manner.

### **Representative Duties:**

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1. Monitor the accuracy of incoming clearing including suspense, delayed, rejected, and qualified/unqualified and ensure they are debited/credited on the date negotiated/due.
2. Process daily and monthly overdraft reporting.
3. Reconcile e-Transfers and CEBS machine transactions.
4. Research and resolve discrepancies related to clearing.
5. Global Payment card administration.
6. Process monthly Cuets billing.
7. Dormant account administration.
8. Lost/stolen card report completion.
9. Clerical duties relating to the filing of AML reports.
10. Clerical duties relating to fraud incidents.
11. Perform other related duties and provide back-up service as required.

### **Required Qualifications:**

- Minimum of one year financial service experience or an equivalent combination of education and experience.
- Successful completion of CUIC 185 and/or CUIC 200.
- Successful completion of the MSR II course and exam.
- Solid working knowledge of all Coastal Community products and services.
- Solid working knowledge of the banking system.
- Solid working knowledge of CPA rules and credit union policy and procedures as it relates to clearing.
- Actively pursuing the CUIC Fellowship Designation and/or other related education.
- Above average MSR/OSR skills.
- Demonstrated leadership skills.
- Excellent written and verbal communication skills.

### **Required Abilities:**

- Proficient with the Windows suite of programs.
- Ability to utilize sound judgement in developing recommendations.
- Ability to multitask while providing quality service.
- Ability to complete projects and work within time constraints in a high paced environment.

**Skills to Benefit this Position Include:**

- Customer Service Skills
- Time Management Skills
- Interpersonal Skills
- Problem Solving Skills

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