

## JOB DESCRIPTION

**Position:** Operations Service Representative, Record and Retention Clerk      **Group:** 2  
**Reports to:** Assistant Manager

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

Under general supervision, the Operations Service Representative, Record and Retention Clerk is responsible for the maintenance of the centralized filing system. 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:**

1. Maintains the centralized database for member files and documents.
2. Create new files, organize and remove closed files.
3. Answers and responds to telephone inquiries.
4. Retrieve, scan and send documents in a timely manner as requested.
5. Responds to requests for information from the Privacy Administrator.
6. Maintain retention/destruction records for archived documents as per legislation requirements
7. Performs other related duties as required.

### **Required Qualifications:**

- Minimum of one year financial service experience or an equivalent combination of education and experience or an Office Records Management Certificate.
- Minimum of one year of work experience in an office environment.
- 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.
- Actively pursuing the CUIC Fellowship Designation and/or other related education.
- Excellent written and verbal communication skills.
- Demonstrated leadership skills.
- Above average MSR/OSR 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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