



## Credit Union Operations Support Specialist Job Description

### JOB INFORMATION

<i>Job Code:</i>	115016
<i>Job Title:</i>	Credit Union Operations Support Specialist
<i>FLSA Status:</i>	Non-Exempt
<i>Supervisory:</i>	May oversee student, temporary and/or resource workers.
<i>Job Family:</i>	Credit Union
<i>Job Family Group:</i>	Accounting, Finance and Banking
<i>Management Level:</i>	7 Individual Contributor

### JOB SUMMARY

Has responsibility for opening new accounts and processing member wire requests, servicing individual retirement accounts (IRA), updating share accounts, setting up ACH withdrawals, blocking lost debit and credit cards and processing deceased member accounts. Monitors system reports, as assigned. Ensures that all IRAs are managed properly and in compliance with state and federal regulations.

### JOB QUALIFICATIONS:

#### Education

<i>Req</i>	<i>Pref</i>	<i>Degree</i>	<i>Field of Study</i>
X		Associate's degree	

#### Additional Education

*Check here if experience may substitute for some of the above education.*

Combined experience/education as substitute for minimum education

#### Work Experience

<i>Req</i>	<i>Pref</i>	<i>Work Experience</i>	<i>Experience Level</i>
X		2 years	

#### Additional Work Experience

*Check here if education may substitute for some of the above work experience.*

Combined experience/education as substitute for minimum work experience

#### Knowledge, Skills and Abilities

<i>Req</i>	<i>Pref</i>	<i>Functional Skills</i>
X		Customer or financial services experience.
X		Strong knowledge of banking regulations including Regulation E, NACHA rules, Bank Wire Transaction Requirements, Red Flag/ID Theft requirements, US Patriot Act, and IRAs.
X		Excellent interpersonal, communication and customer service skills.
X		Strong organizational skills.
X		Demonstrated proficiency in basic computer applications.

## Other Job Factors

### JOB ACCOUNTABILITIES

	% Time	Essential	Marginal	N/A
Processes outgoing wire requests submitted by members via email or fax within Credit Union's policies and procedures.				
Opens new accounts submitted via the internet, fax and mail. Reviews random sampling of all new accounts opened for exceptions to policies and procedures. Processes member account inquiries, address changes, closing accounts, adjustments and account maintenance requests within Credit Union policies and procedures.				
Handles fax, mail and email requests related to IRA contributions, withdrawals, rollovers, transfers, conversions, excess contribution withdrawals, return of mistaken contributions and adjustments related to IRA accounts.				
Sets up and maintains Required Minimum Distributions (RMDs) for eligible members.				
Handles fax, mail and email requests related to merchant authorization release, release ATM deposit holds, card limit increases, transfer requests, ACH requests, verification of deposits, stop payments for ACH and checks, travel notifications, check re-orders, escheat letter updates, payroll deduction setups and maturity notices for share certificates.				
Monitors system reports related to address changes on account with IRA's and credit cards, stop payments, pending accounts, captured cards, and shares scheduled for maturity.				
Processes member transactions accurately including deposits, loan payments, cashing checks, and withdrawals.				
Processes all return mail into core system. Scans all membership/account updates into our imaging system.				
Maintains currency on changes within legal, regulatory, competitive economic and technology environments which may affect specialized accounts programs.				

### Other Requirements

<i>Essential:</i>	<i>Emergency Response/Recovery</i>	<i>Essential:</i>	<i>Mandated Reporter</i>
	In the event of an emergency, the employee holding this position is required to "report to duty" in accordance with the university's Emergency Operations Plan and/or the employee's department's emergency response and/or recovery plans. Familiarity with those plans and regular training to implement those plans is required. During or immediately following an emergency, the employee will be notified to assist in the emergency response efforts, and mobilize other staff members if needed.		A mandated reporter who in his or her professional capacity has knowledge of, or reasonably suspects a person who is under the age of 18 years, elderly, or a dependent adult has been the victim of abuse or neglect must report the suspected incident. The reporter must contact a designated agency immediately or as soon as practically possible by telephone or in writing within 36 hours. By virtue of the associated job duties, this position qualifies as a mandated reporter as required by state law and USC's policy at: <a href="https://policy.usc.edu/mandated-reporters/">https://policy.usc.edu/mandated-reporters/</a>
<i>Campus Security Authority (CSA)</i>			<i>Essential:</i>
By virtue of the associated job duties, this position qualifies as a Campus Security Authority as required by law and USC's policy at: <a href="https://dps.usc.edu/alerts/clery/">https://dps.usc.edu/alerts/clery/</a>			No

### ACKNOWLEDGMENTS

The above statements reflect the essential and non-essential functions as necessary to describe the principle contents of the job. They are not intended to be a complete statement of all work requirements or duties that may be required of the position. I understand that I may be asked to perform other duties as assigned. USC reserves the right to add or change duties at any time.

The University of Southern California is an Equal Opportunity Employer. USC prohibits discrimination on any basis protected under federal, state, or local law, regulation, or ordinance or university policies. All employment decisions are based on individual qualifications and business need.

I acknowledge receipt of this job description and its associated physical requirements. I have read and understand the job

description and job requirements and agree to abide by their contents. I realize that duties may be requested of me that are not specifically stated herein. I understand that I will be expected to adjust to potential fluctuations in work volume. I understand that, if I have any questions about the essential functions or expectations of my position, my supervisor and/or HR partner are available to discuss them with me.

\_\_\_\_\_  
Print Employee Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Print Manager Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

This job description describes the general nature and level of work required by the position. It is not intended to be an all-inclusive list of qualifications, skills, duties, responsibilities or working conditions of the job. The job description is subject to change with or without notice, and Management reserves the right to add, modify or remove any qualification or duty. Nothing in this job description changes the existing at-will employment relationship between the university and the employee occupying the position.