

## JOB DESCRIPTION

|                                        |                                                            |                               |
|----------------------------------------|------------------------------------------------------------|-------------------------------|
| <b>Department: Crown Savers Office</b> | <b>Name:</b>                                               | <b>Post</b>                   |
| <b>Job Title:</b>                      | <b>CREDIT UNION MEMBERS<br/>SUPPORT/LOAN ADMINISTRATOR</b> |                               |
| <b>Scale:</b>                          | <b>Salary £11.00 per hour</b>                              |                               |
| <b>Reports to:</b>                     | <b>Credit Union Manager</b>                                | <b>Board of<br/>Directors</b> |

### Main purpose and scope of the job

To assist in ensuring that all administrative tasks are carried out in a timely, accurate and efficient manner to ensure maximum member/customer satisfaction.

Thereby, enabling the credit union to execute its services to its members in an effective manner. Due to the nature of the work involved confidentiality and discretion are pre-requisites.

### RESPONSIBILITIES AND PERSONAL DUTIES:

To assist in the smooth running of the Credit Union office:

Ensure that members feel valued and welcome in dealings with the credit union

#### **Member Support:**

- Opening and distributing morning post and taking post to post room at the end of day
- Producing all standard forms
- Dealing with member enquiries by post telephone, email, and from website
- Ensure that suitable ID requirements are adequately maintained
- Ensure effective record keeping both manually and computer software
- Dealing with & processing share withdrawals
- Creating New Membership, Process new membership details on Curtains
- Maintain and update manual and computerised records for members, updating the records with comprehensive details as required.
- Dealing with and Processing online transactions by members
- Assist in all bulk mail outs, and distribution of all publicity related to the marketing of the business.
- Assist in scanning documentation
- Daily exception reports and preparing any letters that may arise.
- Promote Sale of Membership, Savings and Loan Products
- Processing all Worldpay instructions from members

#### **Loans Administration**

- Provide support to Members with loan submission,
- Administration of all online loan paperwork
- Collecting ALL loan Evidence
- Preparation and processing on Curtains all Credit Union loan applications for the approval
- Ensure credit check on loans are carried out
- Communicate by email regarding members loan status
- Ensure daily end of day exceptions report are carried out by amending members account as appropriate, and sending out payroll or standing order forms
- Responsible for producing and updating members loans forms

**General**

- To promote and advise members and potential members on Credit Union Aims, rules, services and benefits
- Must work within the policies & procedures of the credit union at all times.
- You are required to treat all information acquired through your employment, both formally and informally, in strict confidence. There are strict rules and protocols about access to and use of members' personal and financial information. Any breach of these rules and protocols will be regarded as subject to disciplinary investigation. There are also procedures in place for employees to raise any matters of concern regarding issues of bad practice or mismanagement.
- Will undertake such other duties as may be reasonably required, and will be expected to work effectively with others in order to make a positive contribution to the work of the organization
- Carry out the duties of this post with due regard to the company's Equal Opportunities Policy.  
The organisation is committed to achieving equality of opportunities in both services to the community and in the employment of people. The post holder is expected to understand and promote this and all other policies of the
- Will be expected to keep under review his/her own training needs and attend training or other developmental activities from time to time as appropriate
- Take due and reasonable care of him/herself and others in respect of Health & Safety at Work.
- Participate in appraisal, training and development in all work activities.
- Required to maintain an awareness of legislation and regulation governing the operation of credit unions.
- Required to maintain a sense of social responsibility and ethical approach, as well as a commitment to treating customers fairly.
- In all work activities, comply with data protection legislation and to maintain strict confidentiality and security in dealing with all information relating to the credit union and its members in accordance with the credit union's rules
- Required to complete a Credit Union Confidentiality Agreement, which is held on file this agreement remains binding after the individual ceases to work for the Credit Union. Employees who breach confidentiality could be disciplined.
- Such other duties that may reasonably be requested by the Manager and that are within the level of the responsibility of this post.
- to work outside normal office hours and location subject to personal circumstances and advance notice.
- Meet the requirement of the credit union sickness policy

**Signature of Post Holder:**

**Signature of Immediate Superior:**

**Signature by/on behalf of Board of Directors:**

**Date:**