



**Member Services Representative**  
Non-Exempt

**I. Summary**

Under the supervision of the Member Services Manager, the Member Services Representative utilizes standard accounting and office procedures to process and maintain member and accounts receivable records. Responsibilities include computer data entry, verification, processing payments, maintaining control of daily collections, answering telephone inquiries, and assisting walk-in customers. General office duties such as typing, copying, filing, and shredding are also part of the role. May be required to work after hours during severe weather conditions. Completion of assigned training and demonstration of competencies are necessary for progression.

**II. Reporting Relationships**

- A. Reports to: Member Services Manager
- B. Directs: None

**III. Internal and External Relationships**

**A. Internal:**

1. Member Services Manager: Receive instructions and special training.
2. Office Staff: Cooperate on office procedures and tasks.
3. Other Employees: Cooperate and coordinate as a working team.

**B. External:**

1. Members: Maintain courteous and cooperative relationships.
2. General Public: Improve member/public relations and foster acceptance of the Cooperative.

**IV. Responsibilities and Authorities**

**A. Essential Functions:**

1. Maintain and respond to inquiries related to member accounts, service, billings, rates, deposits, payment extensions, and other related matters.
2. Act as a receptionist, assisting members and the public via phone and in person.
3. Document member communication, generate and complete service orders, set up deferred payments, and provide information on financial assistance.
4. Collect member payments, balance accounts receivable, and prepare bank deposits.
5. Process adjustments to member accounts and maintain audit documentation.
6. Maintain reports of accounts receivable balances and coordinate collections for delinquent accounts.
7. Check billing reports for accuracy and high/low usage patterns.
8. Calculate consumer bills based on approved tariffs.
9. Maintain regular attendance during business hours.

**B. Additional Functions:**

1. Coordinate monthly schedules of reports and productions.
2. Process bank drafts and recurring credit card payments.
3. Assist in gathering and submitting information for cooperative personnel.
4. Maintain member files and database records.
5. Maintain a professional personal appearance.
6. Communicate with linemen using two-way radio.
7. Stay informed about Cooperative affairs and communicate updates to members.
8. Perform other duties as assigned.

### **C. Learning and Training:**

1. Stay updated on changes in office procedures and computer software applications.
2. Stay knowledgeable about rules governing member accounts.
3. Attend meetings, workshops, and seminars as required, including virtual and on-the-job training.

### **D. Safety:**

1. Practice safe office procedures and adhere to policies.
2. Attend regularly scheduled office safety meetings.
3. Keep work area and computer equipment organized and maintained for safety.

### **E. Inspecting, Record-Keeping, and Verifying:**

1. Reconcile daily recap reports and assure correct balances.
2. Coordinate monthly schedules of reports and productions.
3. Reconcile member accounting records monthly with the general ledger.
4. Prepare necessary reports and paperwork as assigned.
5. Maintain member records and document communication.

## **V. Qualifications**

### **A. Job Requirements:**

1. Must be proficient in using personal computers and office machines, with working knowledge of Microsoft Office software.
2. Experience in consumer accounts work preferred.
3. Understanding of consumer information systems and meter reading processes desired.
4. Knowledge of general office practices and procedures, along with basic math skills.

### **B. Abilities and Skills:**

1. Warm, welcoming disposition and a collaborative approach to tasks and projects.
2. High level of integrity and must exercise sound judgment.
3. Ability to use basic office equipment.
4. Timely completion of work.
5. Effective communication skills.
6. Valid driver's license and insurable under current carrier's standard rate.
7. Maintain strict confidentiality.

- 8. Problem-solving skills.
- 9. Ability to read, understand, and administer policies and procedures.
- 10. Must pass initial physical exam; random drug/controlled substance screenings.
- 11. Access to reliable transportation.

**C. Educational Requirements:**

- 1. High school diploma or equivalent, with emphasis on office procedures and customer service. Associates degree preferred.

**D. Physical Demands and Working Conditions:**

- 1. Ability to lift boxes weighing approximately 40 lbs.
- 2. Reach or place supplies stored in cabinets.
- 3. Works indoors in an office setting.
- 4. Occasional overtime or weekend work may be necessary.
- 5. Resides within a 30-minute response time distance of assigned office.
- 6. Frequent sitting, occasional standing, and traversing within the office area.

*The above statements are intended to describe the general nature and level of work being performed by individuals assigned to this classification. They are not intended to be construed as an exhaustive list of all responsibilities, duties, and skills required.*

**Agreed to:**

Member Services Representative: _____	Date: _____
Member Services Manager: _____	Date: _____
Vice President of Member Services: _____	Date: _____
Human Resources Administrator: _____	Date: _____
General Manager/CEO: _____	Date: _____