

**KAUAI FCU
Job Description**

Job Title: Intake Specialist – CRUA	Effective Date: January 2022
FLSA Status: Non-Exempt	
PURPOSE AND SCOPE	
<ul style="list-style-type: none"> Serve as a resource and primary processor of the CRUA (Coronavirus Rental and Utility Assistance Program) funding and processing of applications. 	
ESSENTIAL JOB FUNCTIONS	
1. Respond to applicant communications regarding the CRUA program. This may include answering phone calls, responding to voicemails, email, text, and mail. Ensure that inquiries are responded to timely and with a high level of service quality.	
2. Facilitate a smooth transaction with the applicant as a liaison between the applicant the credit union. Work with applicants to ensure that all necessary documents are completed correctly and collected timely.	
3. Assist in the disbursement of funding to the applicants of CRUA. Must be highly organized and be able to perform self-check for accuracy of work performed. This may also include preparing the applicants funds to be mailed.	
4. Be able to effectively answer questions about status of applications, follow process flows, and update manager on status of queue management.	
8. Effectively troubleshoot and problem solve for any issues that may arise as part of the application process.	
9. Must comply with applicable policies, laws and regulations, including but not limited to the Bank Secrecy Act, the USA PATRIOT Act, Office of Foreign Assets Control, and the Equal Credit Opportunity Act.	
10. Project a positive attitude and patient, open listening, and communication skills.	
11. Perform other work as assigned.	
SUPERVISION RECEIVED	
<ul style="list-style-type: none"> Work with minimal supervision and direction from the Program Manager. Empowered to solve problems in a professional and timely manner. Exercise discretion and independent judgment in tasks/situations detailed in departmental procedures. 	
MANAGEMENT/SUPERVISORY RESPONSIBILITIES	
Directly Supervises: NONE	

IDEAL EDUCATION AND/OR EXPERIENCE
<ul style="list-style-type: none"> • High school graduate with two-year college courses and/or the equivalent of experience. • Financial institution and customer service experience preferred, but not required.
CERTIFICATES, LICENSES, REGISTRATIONS REQUIRED
NONE
KNOWLEDGE/SKILLS REQUIRED
<p>Must be able to communicate (verbally and in writing) clearly in the English Language. Proficiency in MS Office (Word/Excel) and Outlook preferred.</p>
REASONING/DECISION-MAKING/PLANNING ABILITY
<p>Must be able to make good decisions dealing with applicants, credit union employees, and the public in a timely manner.</p>
CUSTOMER/MEMBER INTERFACE
<p>Daily and direct, face-to-face contact with external or internal customers or members; may be followed up with correspondence, telephone, electronic messaging, etc.</p>
PHYSICAL DEMANDS
<p>Work Environment:</p> <ul style="list-style-type: none"> • “Moderate” noise level in an enclosed air conditioned facility (e.g., office with computers, printers, work area with light traffic, telephones, etc.). • Usually indoor work with occasional work outdoors. • Must be able to lift, push, and pull a minimum of 25 lbs. • Must be able to operate office equipment such as: computer, telephone, scanner/printer, and calculator. • Position may require prolonged sitting, standing, and walking. • May be required to drive to other locations and community organizations using a personal vehicle to help facilitate the program.

TRAVEL REQUIREMENTS

Some travel may be required to attend meeting/educational offerings by car or aircraft to various locations throughout the United States. The length of the travel varies by purpose.

ATTENDANCE REQUIREMENTS

Please note that scheduled attendance requirements may change due to business needs.

This is a full-time position and hours may vary depending on scheduling needs.

Must be able to work additional hours, weekends, and Holidays as needed.