

**KAUAI GOVERNMENT EFCU
Job Description**

Job Title: Intake Specialist	Effective Date: 1/4/21
FLSA Status: Non-Exempt	
Reports to: Community Development Officer	
PURPOSE AND SCOPE	
<ul style="list-style-type: none"> • Serve as a resource and primary point of contact for applicants to various community development and emergency aid programs, such as Paycheck Protection Program, USDA loan programs, and grant programs, as they become available and offered through the credit union. • Provide administrative support to the credit union’s special community development and emergency aid programs. 	
ESSENTIAL JOB FUNCTIONS	
1. Respond to member communications regarding the credit union’s programs. 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 and officers with appropriate approval authority, either within the credit union or with an external third-party. Work with applicants to ensure that all necessary documents are completed correctly and collected timely.	
3. Facilitate the closing of any approved loans or grants, ensuring that all documents are completed and signed properly and that funds are received by the appropriate party.	
4. Occasionally visit businesses and community organizations in order to remove barriers, answer questions in the field, build relationships and trust, and process applications in order to demonstrate the credit union principle that “We show up” in times of need.	
5. Maintain a working knowledge of credit union programs sufficient to assist applicants through all stages of the process.	
6. Process SBA Paycheck Protection Program (PPP) applications for new loans and applications for forgiveness. Process applications for USDA loan programs, and other grant programs facilitated by the credit union.	
7. Assist with opening accounts for entities or individuals that choose to become members of the credit union as part of the application process.	
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 Community Development Officer. • 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/Loan Services 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.</p> <p>Knowledge of business financial documentation preferred.</p>
REASONING/DECISION-MAKING/PLANNING ABILITY
Must be able to make good decisions dealing with applicants, credit union employees, and the public in a timely manner.
CUSTOMER/MEMBER INTERFACE
Daily and direct, face-to-face contact with external or internal customers or members; may be followed up with correspondence, telephone, electronic messaging, etc.
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, typewriter, fax, telephone, photocopier, and calculator.
- Position may require prolonged sitting, standing, and walking.
- May be required to drive to other business and community organizations using a personal vehicle.

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.

Scheduled days of work when the credit union is open:

Monday – Thursday: 8:00am – 4:45pm

Friday: 8:00am – 5:45pm

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

