

Heritage South Community Credit Union

JOB DESCRIPTION

POSITION TITLE: Teller (Full-time or Part-Time)
SALARY STATUS: Hourly
REPORTS TO: Member Services Manager or Branch Manager

Qualifications of Position:

- Minimum of high school diploma or equivalent
- One year of teller experience or a minimum of one year at a position that required handling money
- Effective communication skills and professional manner

Position Duties and Responsibilities:

Under general supervision, in compliance with established policies and procedures, the Teller is responsible for providing high quality of member service, performing the following functions and duties:

1. Represent the Credit Union to the members in a courteous, professional manner, and provide prompt, efficient, and accurate service in processing transactions
2. Process transactions which may include deposits, withdrawals, transfers, sales of money orders and prepaid cards, loan payments, VISA payments, cash advances on credit cards, Duck River Electric payments (at branches where applicable), the sale and settlement of postage stamps, and the balance of daily activity
3. Assist members with name changes (updating signature cards), address changes, check orders or reorders, and payroll deduction changes, forwarding them to the proper department
4. Is responsible for maintaining an adequate amount of cash in teller drawer, the security of the drawer, and the daily balancing of cash drawer
5. Balance checks received daily
6. Is responsible for remaining at the office after closing, as necessary, to balance work
7. Monitor inventory of supplies and inform ordering agent when supplies need to be ordered
8. Is knowledgeable of all products and services of the Credit Union, able to answer any questions or inquiries regarding them, and cross-sell to members when warranted
9. Keep confidential all member account information
10. Verify night deposits, under dual control, listing each in log book, and posting first thing each day.
11. Assist members, as needed, with lock box entry

12. Is responsible for answering member inquiries, handling problems, and/or directing members to the proper department for prompt and efficient service
13. Answer incoming calls, as needed, in the event of the absence of the Call Center Member Service Representative or if she/he is busy handling other calls
14. Act as back-up for Member Service Representative in her/his absence or if busy with other members
15. Assure proper maintenance, cleanliness, and security of work area and equipment
16. Perform other duties as assigned

Minimum Performance Standards:

1. All negotiable items are to be processed on the date received.
2. All checks, money orders, and prepaid cards are to be carefully inspected to determine negotiability.
3. It is the Teller's responsibility to maintain an accurate cash balance daily. While management acknowledges there are no set limits for drawer outages, excessive out-of-balance situations will be monitored and determined by management. Any out-of-balance condition must be properly recorded.
4. It is the responsibility of the Teller to accurately post all member transactions.
5. It is the responsibility of the Teller to maintain standards of professional dress and behavior as established by the Credit Union and outlined in the Employee Handbook.
6. It is the responsibility of the Teller to maintain sales and service standards at an acceptable level as established by the Credit Union, including the ability to explain the basic features and benefits of all products and services.
7. A Teller should recognize and utilize all opportunities to cross-sell Credit Union products and services.
8. A Teller is expected to greet each member with a smile and courteous greeting.
9. A Teller should greet each member by name, or refer to documents indicating the member's name.
10. A Teller should maintain effective eye contact with the member.
11. A Teller should listen effectively so as to solve member problems and service product needs.
12. A Teller should always smile and thank each member upon completion of transaction.
13. A Teller is expected to maintain a positive team environment by cooperating with others who request assistance, offer assistance if none is requested, and request assistance if needed.
14. A Teller is required to follow attendance guidelines outlined in the Employee Handbook, arriving at work on or before scheduled work time. Instances of tardiness should be limited to extenuating circumstances.
15. A Teller is required to follow all policies and procedures established by the Credit Union.