



## JOB DESCRIPTION

<b>TELLER SERVICES ASSOCIATE 1</b>		
<i><b>DIVISION</b></i>	<i><b>DEPARTMENT</b></i>	<i><b>FLSA STATUS</b></i>
Finance & Member Solutions	Financial Services	Nonexempt

### ❖ **POSITION OVERVIEW**

Provide professional, friendly, and quality service to Old West Federal Credit Union members.

### ❖ **ESSENTIAL FUNCTIONS**

1. Satisfactory completion of all basic Credit Union required CPD's.
2. Actively engage with people in a respectful and professional manner.
3. Deepen member relationships by determining member needs and promoting and cross-selling OWFCU products and services.
4. Communicate in a respectful, professional, and timely manner in person over the phone, and via e-mail.
5. Handle all teller transactions with a high level of accuracy (i.e. deposits, withdrawals, transfers, cash advances, loan/visa payments, check cashing, line of credit advances, counter checks, traveler's checks, money orders, wire forms, stop pays, gift cards, post ATM deposits, night drop, GL postings, safe deposit box transactions, and other inquiries).
6. Handle other transactions with a high level of accuracy (i.e. accurately complete change of address forms, assist members on home banking, scanning in checks and daily work, balancing member checkbooks, check orders- know the process, research, member filing- red and blue, tellers may only close savings accounts with balances of \$100 or less).
7. Handle secondary functions with a high level of accuracy (i.e. red file reviews).
8. Answer the telephone by the second ring in a welcoming and professional manner. Assist the member when possible.
9. Satisfactory completion of all required CPD's for tellers, in a timely manner.
10. Determine acceptability of negotiable items and member identification.
11. Maintain a balanced cash drawer within a predetermined cash limit.
12. Assist members in identifying and resolving issues or problems in a timely and accurate manner.
13. Adhere to all teller policies and procedures (i.e. member transactions, cash handling, negotiable items, daily work, etc).
14. Prepare and disseminate reports within specified timeframes, if requested or required.
15. With your supervisor, consistently set and achieve stated goals.
16. Assist with departmental duties, training and audits as needed, requested or required.
17. Actively participate in security, robbery, and disaster recovery training.
18. Participate in required meetings and training.
19. Serve on committees and attend meetings as requested.
20. Demonstrate leadership skills and foster an environment supportive of the Credit Union's values, accomplishments, mission and vision.
21. Represent the Credit Union with a high level of integrity and professionalism.
22. Contribute to a favorable public image of the Credit Union by establishing and maintaining professional relationships and participating in community and business development activities.
23. Adhere to federal and state regulations, credit union policies and procedures, and other compliance obligations.
24. Actively contribute to Credit Union and department team goals and functions, including but not limited to, initiating resolution of observed or known issues concerning other departments and championing other departmental changes that will benefit the organization.
25. Support Management decisions and goals in a positive, professional manner.
26. Must complete training and become knowledgeable in BSA, OFAC and Customer Identification regulations. Must follow policies and procedures in these areas.
27. Perform other duties as assigned.

## TELLER SERVICES ASSOCIATE - CONTINUED

### ❖ INTERACTION AND ENVIRONMENT

Reports To: Operations Supervisor/Assistant Branch Manger

The Teller Service Associate position involves frequent interactions with members including interpreting requests, answering questions and educating on products, services, procedures, policies and regulations. Work areas are inside in a climate-controlled environment with background noise, distractions and frequent interruptions.

### ❖ MATERIAL AND EQUIPMENT USED:

Computer	Fax Machine	Copier
Telephone	Ten-Key/Calculator	Drive-up Equipment
Coin Machine	Black Light	General Office Supplies
Scanners	Currency Counter	

### ❖ PHYSICAL ACTIVITIES REQUIRED TO PERFORM ESSENTIAL FUNCTIONS

Sitting/Mobility: Approximately 80% of time is spent standing at a teller window. Balance of time (approximately 20%) is spent moving around work areas.

Communication: Ability to effectively communicate with co-workers, members, and outside agencies in writing, in person, and over the phone.

Vision: Ability to effectively use a computer screen and interpret printed materials, memos and other appropriate paperwork.

Lifting/Carrying: Ability to lift, carry, and transport cash drawers, coin, cash dispenser cassettes, files and office supplies.

Stooping/Kneeling: Ability to access files/stock supplies in high or low cabinets and shelves.

Reaching/Handling: Ability to input information into computer systems and retrieve and work with appropriate paperwork, equipment and supplies.

### ❖ PROFICIENCIES

1. Strong written and oral communication skills; ability to communicate effectively and project a professional image when giving and taking information in writing, in person, and over the phone.
2. Excellent customer service skills.
3. Good understanding of computer transactions needed to perform operational tasks with the ability to read histories and interpret account activity.
4. Effective interpersonal skills with the ability to work with individuals and groups at all organization levels; ability to work independently and as part of a team.
5. Ability to take initiative, assume responsibility, and prioritize tasks; good time-management, organizational, problem-prevention and problem-solving skills.
6. Ability to maintain a high degree of accuracy in handling cash, balancing cash drawer and recording daily transactions.
7. Strong analytical ability with active listening skills.
8. Ability to concentrate in environment with background noise.
9. Ability to complete or resume tasks despite interruptions.
10. Ability to work accurately with close attention to detail.
11. Ability to effectively cross-sell Credit Union and CUSO products and services.
12. Willingness and ability to adapt to changing business needs and deadlines.
13. Ability to maintain confidentiality of sensitive information.
14. Possess a work ethic that includes neatness, punctuality and accuracy.
15. Exhibit a professional, businesslike appearance and demeanor.

### ❖ EDUCATION AND EXPERIENCE

1. High school diploma or equivalent; and
2. Minimum six (6) months cash handling and customer service or sales experience; and
3. Must be bondable.