

## Teller

Reports to: Head Teller

### Primary responsibility

To greet members, process transactions, assess our members' needs, and educate and enlighten members as to how we can meet their needs.

### Requirements/Qualifications

- Ability to greet members and make them feel welcome
- Ability to communicate clearly and accurately
- Ability to listen while assessing needs
- Ability to maintain confidentiality at all times
- Ability to learn new product lines
- Ability to handle multiple tasks
- Capacity to learn how to use computers, keyboards, calculators, etc...
- Ability to count and handle cash and other currency accurately
- Become familiar with the security system and safety procedures
- Be conscious of fraudulent or suspicious behavior, and of your surroundings
- Be certain that all transactions are conducted in compliance with the rules and regulations, which govern our business

### Expectations

- That you ascribe to our philosophy of meeting our member's needs and always treating them with respect
- That you dress appropriately and present yourself as a professional at all times
- That you do your best to remain calm and behave in a professional manner, even if the member chooses not to
- That you arrive on time and accurately complete all your daily tasks
- That you be willing to jump in and help when a need presents itself
- That you keep in mind that though the member may not always be right, he or she is always a member, and should be treated with dignity and respect
- That you become familiar and in compliance with all rules and regulations, particularly the Bank Secrecy Act/Anti-Money Laundering
- Be polite, professional, respectful and courteous to members and co-workers alike.

### Physical Demands

Stooping, kneeling, reaching, standing, walking, lifting, feeling, talking, hearing, repetitive motions. Light work.

### Visual Demands

Very heavy visual acuity.

Reviewed 4/10/18

## **Environment**

Inside environmental conditions.

## **Specific Tasks and Responsibilities**

- Learn members' names; be prepared to ask for identification when necessary
- Continually assess our members' needs
- Educate and enlighten members as to how we can meet their needs
- Process various types of transactions
- Manage your cash drawer and balance daily
- Perform file maintenance as is necessary
- Responsible for processing transactions for miscellaneous items sold by the cu
- Assist members with the balancing of their accounts
- Scrutinize ID's and items presented for deposit or cash in order to determine legitimacy
- Count bulk coin deposits
- Assist members in accessing safe deposit boxes
- Set up term deposits
- Be alert for messages on the system regarding members and their accounts
- Advise members of overdue accounts or other matters that are in need of attention
- Process items received through night drop and via mail
- Scan checks

## **Other Duties to Possibly Include:**

- Assisting other departments
- Verify /collect information for check orders

## **Organizational Relationships**

The Teller serves as the front line person with our members. It is imperative that this person has good communication and customer service skills. The teller also interacts with many of our employees, and thus, must have a good working knowledge of how the credit union functions.