



**Job Title:** Teller I  
**Department:** Teller  
**Reports To:** Branch Manager  
**FLSA Status:** Nonexempt  
**Prepared By:** Vice President - Administration  
**Prepared Date:** February 2017  
**Approved By:** Vice President - Administration  
**Approved Date:** February 2017

### **Summary**

Performs a wide range of transactional and sales duties to serve members while offering a consistently high level of service. Receives and dispenses funds with a high degree of accuracy. Maintains accurate transactional records while performing financial transactions, provides basic cash receipt and payment services in accordance with policies and procedures. Professionally and skillfully listens to members and asks probing questions to uncover referral opportunities.

### **Essential Duties and Responsibilities**

#### **Balancing Performance-Approximately 35%**

- Receives checks and cash for deposit, verifies amount, and examines checks for endorsements.
- Cashes checks and pays out currency after verification of signatures and member balances.
- Accurately conducts each member request, entering members' transactions into computer to record transactions, and issues computer generated receipts.
- Recognizes when it is necessary to place holds on accounts for uncollected funds.
- Orders and sells supply of currency, counts incoming cash and outgoing currency.
- Accurately balances currency, coin, and checks in cash drawer at end of shift and compares totaled amounts with data displayed on computer screen.
- Accurately balances the vault, coin machine and COTS machine.
- Verifies the authenticity of transactions by inspecting all checks, money orders, savings withdrawals, cash advances, etc. by reviewing signatures, appropriate identification and account balances.
- Researches all teller transactions when potential errors are identified and communicates with affected members.

#### **Sales Performance-Approximately 30%**

- Meets or exceeds referral goals as set by management and participates in the development and attainment of branch goals.
- Explains, promotes, or sells products and services using feature and benefit statements in support of organizational values and objectives.
- Proactively obtains referrals from existing clients, natural markets and branch business partners.
- Makes referrals to branch business partners.
- Familiar with competitors' products and pricing strategies. Develops techniques to compare/contrast CCCU products and pricing differences between us and our competitors to our members.

- Views Member Servicing aspect of their role as an opportunity to deepen the member's relationship

### **Member Servicing-Approximately 20%**

- Provides quality, personalized relationship servicing to ensure member satisfaction, additional business generation and retention in support of organizational values and objectives.
- Suggests resolution of disputes using a professional, cooperative attitude.
- May assist members with account maintenance, documentation, client correspondence, and paperwork as necessary.

### **Employee Engagement- Approximately 5%**

- Conducts themselves in a manner that is in accordance with CCCU Service Standards.
- Supports strategic initiatives, corporate strategies and goals.
- Actively works toward building an engaging work environment with all credit union employees.
- Proactively brings ideas to management on how to effectively build employee engagement within their department.

### **Training-Approximately 5%**

- Maintains a basic level of financial-services knowledge through in-house and external training (e.g. products, compliance and technology).
- Assumes responsibility for personal development through training, collaboration and teamwork.

### **Other- Approximately 5%**

- Proactively works with supervisor to identify and resolve process improvements within the Branch.
- Performs all other reasonable related business duties as requested.

### **Performance Measures:**

- Meets all referral goals as determined annually.
- Adheres to documentation and compliance of policies and procedures.
- Displays strong negotiation skills and good business judgment to escalate situations to management when appropriate.
- Satisfactory completion of product and service training.
- Satisfactory Quality Loop monthly survey results.
- Efficient in time management.

### **Supervisory Responsibilities**

This job has no supervisory responsibilities.

### **Qualifications**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

### **Education and/or Experience**

High school diploma or general education degree (GED), with one year of teller experience at a financial institution or two years' cashier experience. Also, a working knowledge of PC's.

**Language Skills**

Ability to read and comprehend simple instructions, short correspondence, and memos. Ability to write simple correspondence. Ability to effectively present information in one-on-one and small group situations to members and employees of the organization.

**Mathematical Skills**

Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to perform these calculations consistently and accurately.

**Reasoning Ability**

Ability to apply common sense understanding to carry out detailed but uninvolved written or oral instructions. Ability to deal with problems involving a few concrete variables in standardized situations.

**Physical Demands**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to use hands to finger, handle, or feel and talk or hear. The employee frequently is required to stand and sit. The employee must occasionally lift and/or move up to 40 pounds. Specific vision abilities required by this job include close vision, color vision, and ability to adjust focus.

**Work Environment**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the above duties, the employee is in a pleasant, air conditioned office environment. The noise level in the work environment is usually moderate.