



POSITION DESCRIPTION
TELLER

JOB TITLE:	Teller
DEPARTMENT:	Financial Services
EXEMPT/NON EXEMPT STATUS:	Non-Exempt
PAY GRADE:	5
REPORTS TO:	Branch Manager
DATE:	January 2022

POSITION SUMMARY:

The Teller is responsible to assist members by processing their financial transactions, including paying and receiving cash and other negotiable instruments. Cross sell products and services to members, in effort to meet annual sales goals. Provide excellent service to members while adhering to service values.

POSITION RESPONSIBILITIES:

- 50% Greet members and visitors to the Credit Union in a courteous, professional, and timely manner; providing routine information concerning services and directing members to appropriate departments for specific information and services. Process member transactions daily and provide prompt, accurate, and efficient member service; handle all transactions for members with discretion and confidentiality. Transactions may include, but are not limited to: deposits, withdrawals, loan payments, bond redemption, selling of money orders/official checks and inventory items to members, transfer amounts from member accounts in accordance with Credit Union, state and federal regulations. Post transactions to member accounts and maintain member records. Ability to open and close all branch locations; work as a "floater" to all branches
- 15% Maintain up-to-date and comprehensive knowledge of all products and services handled or promoted by Teller staff and inform members of Credit Union products and services, explaining features and benefits; cross-sell products and services, meet annual sales goals.
- 10% Maintain up-to-date and comprehensive knowledge of all related policies and procedures, and external rules and regulations for the teller area, including robbery procedures.
- 10% Identify fraudulent or suspicious activity to prevent potential losses and function with strict adherence to the Bank Secrecy Act and reporting requirements. Maintain awareness of current fraud alerts.
- 10% Organize and set up work station for daily activity, i.e., obtains necessary forms, brochures, and supplies for individual work station, and order cash as needed, verifying incoming cash for accuracy. Perform both opening and closing procedures, balancing cash drawer and daily transactions.
- 5% Perform other duties and special projects on an as need basis

ADDITIONAL FUNCTIONS:

- May work on the drive-up Teller station.
- May work at another Branch on an “as needed basis.”

PERFORMANCE MEASUREMENTS:

- Provide friendly, professional, personal service to all customers and associates.
- Balance drawer daily with no variance.
- Work in a team atmosphere assisting internal and external members in a positive manner.
- Accurately post transactions.
- Troubleshoot and resolve member and internal inquiries in a timely, friendly and accurate manner.
- Proactively seek opportunities to identify appropriate products and services for the betterment of the members; actively cross selling those products and services to members to achieve or exceed all established sales goals and assist in meeting department goals
- Maintain a dependable record of attendance and timeliness.
- Maintain a professional work environment and businesslike appearance.
- Support Creating Member Loyalty program initiatives and adhere to PVCU Service Standards

REQUIRED STANDARDS FOR ALL EMPLOYEES:

Ensure quality service in all member interactions. Maintain a positive work environment that is respectful and professional towards members, co-workers, supervisors, vendors, visitors. Maintain complete confidentiality of member, employee, and Credit Union information. Abide by the Bank Secrecy Act, and ensure the safety and soundness of the Credit Union in all transactions and interactions.

NOTE: *This list of essential functions is not intended to be exhaustive. It may be supplemented from time to time as required and at the request of one’s supervisor and/or senior management.*

KNOWLEDGE, SKILLS, AND EXPERIENCE REQUIRED:

- Professional, well-developed interpersonal and communication skills are essential for projecting a positive image of PVFC with management, employees, members, sponsors, vendors, visitors, etc.
- Work requires general knowledge of all Credit Union products and services, knowledge of external rules and regulations in cash-handling transactions, including Bank Secrecy Act Laws.
- Position requires high school education and additional coursework in business or accounting or equivalent combination of education and experience. Use of computer equipment is required for member account transactions. Strong computer skills with proficiency in MS Office Word and Excel
- Position requires 1 – 2 years of experience with cash handling and/or customer service skills
- Position requires the ability to read and understand oral and written instructions. Requires the ability to effectively communicate with members or employees and to solve day-to-day problems involving several variables in standard situations.
- Intermediate mathematical skill required (adding, subtracting, multiplying, dividing, percentages, interest) are required.
- Position requires standing or sitting for the majority of the day, as well as lifting and carrying up to 10 pounds when moving coin and cash drawer.

I acknowledge and understand my job description

Date