

**Title:** Teller

Rev: 07/27/05

**Grade:** 4

**Reports to:** Branch Manager or Teller Supervisor

**Primary Function:**

To assist members in completing routine account transactions (deposits, withdrawals, loan payments, transfers, check cashing, inquiries) in a fast and efficient manner; actively promote Northeast's products/services and satisfy members' financial needs personally or by referral.

**Specific Duties: 99%**

- \*Accurately posts all member transactions, maintaining proper security and following policies and procedures as described in the teller manual.
- \*Processes stop payments, share draft orders and payroll distributions.
- \*Determines the nature and extent of each member's financial needs and provides basic information concerning credit union services which meet those needs in a responsive and confident manner.
- \*Recognizes opportunities for and makes referrals to MSR's and Insurance Investment Reps supporting member needs and branch sales objectives.
- \*Meets individual sales and referral goals.
- \*Directs members whenever possible to the appropriate representative to consummate immediate sales.
- \*Maintains standards for balancing accuracy.
- \*Makes loan referrals at every opportunity. **Maintains a minimum number of referrals required in the teller standards.**
- \*Observes retail standards in area of responsibility including:

**Greet member in a friendly/professional manner**

Acknowledging member's presence through eye contact, a smile and pleasant greeting.

Wearing his/her name badge at all times.

Using the member's name during the course of the transaction.

Listening to the member's needs attentively and asking appropriate questions to ensure understanding.

**Never say I do not know or no to a members inquiry. Always say, "Let me get someone that can assist you."**

Thanking the member for his/her business.

**Use the standard - Closing with all members: Is there anything else I can do for you today?**

Offering an appropriate promotional flyer or brochure at the close of a transaction.

Using window closed sign when work window is closed.  
 Conducting self with professionalism in dress and manner.  
 Referring to MSR, Mortgage Originator or Insurance Investment Rep by name in making service referrals.

\*Responsible to perform work safely, use any required safety or health aids, observe all safety regulations and requirements, maintain a safe work area, and drive safely and use seat belts if traveling on company business.

Supports other areas of branch service delivery as directed. **(N) 1%**

**Education:**

\*Strong business math and verbal communication skills; a good comprehension and retention of moderately complex verbal and written materials to understand and assist members with a variety of financial products and services, normally associated with a completion of high school educational program or equivalent education and training.

**Experience and Qualifications:**

\*Prior experience in teller operations (normally one year or more). Must have demonstrated abilities in cash handling accuracy, good organizational skills, **arithmetic and accuracy ability**, strong product knowledge; possess strong public relations skills as well as both a sales aptitude and attitude. **Must possess keyboarding and 10 key skills.**

**Teller Grade 4**

**Equipment Used For Jobs:**

- Computer. CDM, scanners, printers and associated hardware
- Copier, fax and other standard office equipment
- Telephone
- Other: Teller mate, drive up canisters,

**Physical Demands**

	HEAVIEST OBJECT (NAME)	FREQUENCY(number of times per day per day)
LIFT	Coin bags, cash drawers, canisters	2
CARRY	Coin and currency	2
PUSH	Coin and currency	<1
PULL	Cash drawer	1