



POSITION TITLE		DIVISION
Head Teller/MSR-I		Retail Banking
REPORTS TO:	DEPARTMENT	DATE
Assistant Branch Manager and/or Branch Manager	Retail Banking	February 20, 2019
SUPERVISES	FLSA	REVISED
Assistant Head Teller and/or Tellers	Non-Exempt	

GENERAL SUMMARY

Under general supervision, but following established policies and procedures, provides leadership and direction to the Tellers. Delivers exceptional customer service, aligned with the Credit Union's core values and mission statement. Supervises sales and service programs to ensure goals are communicated, met and improved. Responsible for the efficient and effective delivery of products and services to members. Responds to questions and/or provides information upon request from members (internal and external). Processes requests/transactions, as appropriate. Assists members and potential members in understanding and utilizing Credit Union products and services. Provides such member services as opening new accounts, ordering checks, account maintenance, corrections, etc. Interviews and assists members complete loan applications, obtains pertinent loan information and prepares necessary paperwork to disburse loans.

MAJOR RESPONSIBILITIES

1. Maintains security and compliance with Credit Union Security Plan.
2. Serves as vault custodian (buys/sells cash as needed) and balances and troubleshoots ATM and cash recycler.
3. Overrides teller transactions based on authority within policy and procedure.
4. Handles escalations and member complaints related to the Tellers' functions.
5. Conducts monthly/quarterly audits: card stock inventory, official checks and money orders, night deposit contracts, and surprise cash/check audits for tellers.
6. Balances the branch at the close of each business day, which includes assisting tellers to resolve balancing discrepancies.
7. Responsible for daily and monthly reports: overrides and teller differences.
8. Performs teller transactions, both operational and sales oriented.
9. Opens new member accounts and provides information to new and prospective members by explaining and cross-selling Credit Union products and services. Completes forms for opening and processing all types of accounts, including share, share draft, money market, certificates, IRAs, etc.

10. Maintains and services existing members' accounts: address changes, names changes, check re-orders, wire transfers, stop payments, etc.
11. Schedules, trains and delegates duties to tellers.
12. Monitors teller performance by completing quarterly "Member Experience" evaluations and coaches tellers on the spot and during one on one meetings.
13. Acts as the NCU Financial Branch Champion: qualifying referrals and scheduling appointments with Financial Advisors, coaching team members, motivating branch staff to meet goals, and scheduling call nights when necessary.
14. Partners with Branch Management Team to conduct morning huddles, weekly meetings, branch campaigns, etc.
15. Assists Branch Management with performance management, disciplinary actions, and employee evaluations.
16. Participates in the hiring process by screening resumes, interviewing candidates and providing feedback to management on potential Teller new hires.
17. Originates, underwrites and closes Consumer Loans offered by the Credit Union.

QUALIFICATIONS:

Education

High school diploma or equivalent (GED) education required.

Experience/Skills/Knowledge:

1. Preferred: Minimum 3 years previous experience as an Assistant Head Teller/Teller/MSR. Demonstrated knowledge of CU policies and procedures.
2. Excellent verbal, written, telephone and interpersonal communication skills. Must possess a strong service orientation and willingness to sell products and services.
3. Excellent organizational, analytical and problem-solving skills.
4. PC proficient including Microsoft Office (Word, Excel, Outlook) and the Internet.
5. Ability to function in a financial institution branch environment and utilize standard office equipment, including but not limited to: PC, fax, copier, currency counter, money order encoder, telephone, etc. Ability to lift a minimum of 25 lbs. (coin bags). Some travel required.

GENERAL DESCRIPTION:

In terms of physical requirements, this position requires work best described as:

Sedentary Light Medium Heavy Very Heavy

PHYSICAL TASKS:

- Standing/Walking - Frequent
- Hearing - Ability to receive information through oral communication (face to face and telephone). - Continuous
- Talking - Expressing or exchanging ideas by means of the spoken word (face to face and telephone). – Continuous
- Reading – Ability to receive information through fax, e-mail, and text messages – Continuous

AUDIO / VISUAL:

- Requires vision to perform work dealing with data, figures and computer screens. - Continuous
- Requires ability to prepare and execute presentations, training programs, and seminars. - Continuous

PSYCHOLOGICAL/MENTAL DEMANDS:

- Responds positively and productively to stressful internal (employee)/situations. - Continuous
- Assists others to work harmoniously and effectively as part of a work team. – Continuous

Employee's Signature _____ **Date** _____

Manager's Signature _____ **Date** _____

Human Resources' Signature _____ **Date** _____