



POSITION TITLE		DIVISION
Assistant Head Teller/MSR-I		Retail Banking
REPORTS TO:	DEPARTMENT	DATE
Assistant Branch Manager and/or Branch Manager	Retail Banking	September 30, 2015
SUPERVISES	FLSA	REVISED
Tellers	Non-Exempt	October 7, 2021

## 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. Assists Head Teller with daily functions such as reviewing reports; processing ATM transactions; ordering and verifying cash shipments; verifying and balancing the vault, ATM and cash recycler; and balancing and closing the branch.
3. Oversees the tellers, prepares schedules, responds to questions/concerns, and delegates work as needed.
4. Overrides teller transactions based on authority within policy and procedure.
5. Handles escalations and member complaints related to the Tellers' functions.
6. Conducts monthly/quarterly audits: card stock inventory, official checks and money orders, night deposit contracts, and surprise cash/check audits for tellers.
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. Monitors teller performance by completing quarterly "Member Experience" evaluations and coaches tellers on the spot and during one on one meetings.
12. Provides input to Head Teller and Branch Management with performance management, disciplinary actions, and employee evaluations.
13. 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** \_\_\_\_\_