

## POSITION DESCRIPTION

**POSITION TITLE:** Teller/Advisor I

**DEPARTMENT:** Member Service

**CLASSIFICATION:** Non-exempt

**APPROVED BY:** Human Resources

**GRADE:** 4

**EFFECTIVE DATE:** 3/19/01

**REVISED DATE:** 6/21/18

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### REPORTING RELATIONSHIPS

**POSITION REPORTS TO:** Teller Supervisor, Branch Manager or AVP of Branch Operations

**POSITIONS SUPERVISED:** None

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### POSITION PURPOSE

Responsible for providing superior service to members entering the branch. Assist members efficiently, effectively and accurately with deposits, withdrawals, loan payments, cashiers' checks, money orders, and cash advances. Assists supervisor and other staff with a variety of duties as required. Ensures members are promptly and professionally served. Pro-actively supports and advances HCU's brand and culture platform.

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### ESSENTIAL FUNCTIONS AND BASIC DUTIES

**Assumes responsibility for the efficient, effective, and accurate performance of teller operational functions.**

- Greets members entering the branch, directs them to the correct staff member for assistance and provides assistance with ATM usage, coin counting machine, safety deposit boxes and other branch services.
- Serves walk-in, call-in and drive-thru members with various account transactions.
- Receives and processes loan payments in person, by mail, or through the night deposit.
- Processes cash advances, cashiers' checks, money orders, government bonds, stop payments and similar transactions.
- Disburses cash or check withdrawals in person and processes transfers by telephone, or by mail.
- Assists members in adding new shares and closing accounts.
- Receives deposits in person, by mail, through the night deposit, or through the ATM.
- Monitors deposit amounts and examines documents for endorsement and negotiability. Detects and resolves discrepancies promptly.
- Balances ATM machines, coin counters, and cash dispensing/recycling machines in a timely and accurate manner.
- Receives and processes changes of name, addresses, and other account information as needed.
- Assists with administration of safety deposit box program, if applicable.
- Performs drive-up teller and night drop functions as assigned.
- Performs branch opening and closing procedures as assigned.
- Adheres to the Teller Standards policy.

**Assumes responsibility for the effective and professional performance of member service related activities.**

- Providing members personalized, exceptional member experience, with each interaction.
- Works with members to help answer questions and resolve any account related issues or needs.
- Represents HCU in a courteous and professional manner.
- Maintains privacy of member account information.
- Ensures HCU's quality reputation is maintained and projected.

**Assists members and potential members by educating them on HCU's products and services.**

- Maintains a working knowledge of HCU products and services.
- Meets assigned monthly referral and needs based cross-sell goals.
- Presents and explains HCU services and products to members and assists in meeting their financial needs.

**Assumes responsibility for related duties as required or assigned.**

- Assists other Tellers, FSR's, Branch Manager and other staff as necessary.
- Ensures proper maintenance, cleanliness, and security of work area, desks, equipment, etc.
- Performs related clerical duties as required.
- Keeps supervisor informed of area activities and of any significant problems or concerns.
- Completes required reports and records accurately and promptly.
- Attends meetings and training as required.
- Actively contributes to positive, professional working environment.
- To abide by all federal, state, and local laws including but not limited to: The Bank Secrecy Act, including the Office of Foreign Assets Control (OFAC) and Financial Crimes Enforcement Network (FinCEN); Uniform Commercial Code (UCC); Federal Reserve Bank; and National Credit Union Administration.

**CORE COMPETENCIES**

- **Member Relations** - The degree to which member service and professional rapport is demonstrated in the day-to-day business environment.
- **Problem Solving** - The ability to predict, recognize, and define problems. Skill in generating, selecting, and implementing timely and meaningful solutions.
- **Balancing** - Teller balancing performance as compared to other tellers or against a standard. Understanding of the Teller Standards Policy.
- **Career Development** - The degree to which the employee actively participates in required education and training, completes required training assignments by the due date, and successfully completes training assignments with a passing grade (if applicable).

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**PERFORMANCE MEASUREMENTS**

1. Teller functions are efficiently, effectively, and accurately performed in accordance with established policies, standards, and security procedures.
2. Monies are balanced, and any discrepancies promptly resolved. A balancing record that meets established standards is maintained.
3. Good business relations exist with members. Member issues or questions are courteously and promptly resolved.

4. Good working relationships and coordination exist with area personnel and with management. Assistance is provided to other Tellers and staff as needed. Supervisors are appropriately informed of area activities.
  5. Required reports and records are accurate, complete, and timely.
  6. The HCU's professional reputation is maintained and conveyed.
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## QUALIFICATIONS

<b>EDUCATION/CERTIFICATION:</b>	High school graduate or equivalent.
<b>REQUIRED KNOWLEDGE:</b>	Knowledge of Teller policies and procedures. Basic understanding of Company operations.
<b>EXPERIENCE REQUIRED:</b>	Previous customer service and cash handling experience preferred. Abilities generally acquired on the job within six months.
<b>SKILLS/ABILITIES:</b>	Strong communication abilities. Accurate and attentive to detail. Good math skills Well organized. Willingness to assist others. Able to operate related computer applications and PC. Proficient in MS Office including Word, Excel and Outlook. Professional appearance. Flexible and open to change.

## PHYSICAL ACTIVITIES AND REQUIREMENTS OF THIS POSITION

<b>TALKING:</b>	Especially where one must frequently convey detailed or important instructions or ideas accurately, loudly, or quickly.
<b>AVERAGE HEARING:</b>	Able to hear average or normal conversations and receive ordinary information.
<b>FINGER DEXTERITY:</b>	Using primarily just the fingers to make small movements such as typing, picking up small objects, or pinching fingers together.
<b>REPETITIVE MOTION:</b>	Movements frequently and regularly required using the wrists, hands, and/or fingers.
<b>AVERAGE VISUAL ABILITIES:</b>	Average, ordinary, visual acuity necessary to prepare or inspect documents or products, or operate machinery.
<b>PHYSICAL STRENGTH:</b>	Light work. Exerts up to 30 lbs. occasionally and/or up to 10 lbs. frequently. Standing for extended periods of time.

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## WORKING CONDITIONS

**NONE:** No hazardous or significantly unpleasant conditions (such as in a typical office).

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## MENTAL ACTIVITIES AND REQUIREMENTS OF THIS POSITION

<b>REASONING ABILITY:</b>	Ability to apply common sense understanding to carry out detailed but uninvolved instructions and to deal with issues involving a few variables.
<b>MATHEMATICS ABILITY:</b>	Ability to perform basic math skills, use decimals to compute ratios and percents, and to draw and interpret graphs.
<b>LANGUAGE ABILITY:</b>	Ability to use passive vocabulary of 5,000-6,000 words; read at a slow rate; and define unfamiliar words in dictionaries for meaning, spelling, and pronunciation. Ability to write complex sentences, using proper punctuation, and using adjectives and adverbs. Ability to communicate in complex sentences, using normal word order with present and past tenses and good vocabulary.

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## INTENT AND FUNCTION OF JOB DESCRIPTIONS

*Job descriptions assist organizations in ensuring that the hiring process is fairly administered and that qualified employees are selected. They are also essential to an effective appraisal system and related promotion, transfer, layoff, and termination decisions. Well constructed job descriptions are an integral part of any effective compensation system.*

*All descriptions have been reviewed to ensure that only essential functions and basic duties have been included. Peripheral tasks, only incidentally related to each position, have been excluded. Requirements, skills, and abilities included have been determined to be the minimal standards required to successfully perform the positions. In no instance, however, should the duties, responsibilities, and requirements delineated be interpreted as all-inclusive. Additional functions and requirements may be assigned by supervisors as deemed appropriate.*

*In accordance with the Americans with Disabilities Act, it is possible that requirements may be modified to reasonably accommodate disabled individuals. However, no accommodations will be made which may pose serious health or safety risks to the employee or others or which impose undue hardships on the organization.*

*Job descriptions are not intended as and do not create employment contracts. The organization maintains its status as an at-will employer. Employees can be terminated for any reason not prohibited by law.*