

Teller/CSR

Position Information



Code/ID:

Department: Operations

Job Classification: Non-Exempt

EEOC Category: Administrative Support Workers

Asset Size: 2025 \$200M-\$400M

Role

Responsible for accurately processing financial transactions, opening accounts and being an effective source of information for customers: in lobby, drive-thru window or by telephone. Provides friendly, professional, confidential and effective assistance to customers assuring a positive experience and minimizing wait time. This position may be asked to serve on other teams striving to achieve a "Better State of Banking." This objective will be done within the context of Team Guidelines, Vision, Mission, and Core Values.

Major Duties and Responsibilities

WEIGHT	DESCRIPTION	ESSENTIAL
	Demonstrates efficiency and accuracy in processing financial transactions for checking, savings, and borrowing customers. Responsibilities include:	
	- Receiving and posting deposits, processing withdrawals, and disbursing funds per customer requests.	
	- Verbally confirming all transactions with customers to ensure clarity, accuracy, and customer satisfaction, minimizing the need for corrections or rework.	
	- Issuing cashier's checks and money orders in accordance with established procedures.	
50%	- Exchanging currency for coin and verifying cash amounts to ensure accuracy and compliance.	✓
	- Processing the redemption of savings bonds and cashing checks while following all written security and compliance procedures.	
	- Accepting and processing loan payments, ensuring accurate recording of amounts, payment dates, and any relevant account information.	
	- Addressing customer inquiries related to account activity, loan status, or transaction history with professionalism and accuracy.	
	- Verifying customer calculations and validating the authenticity of checks and/or counting cash payments to ensure proper documentation and reconciliation.	
10%	Balances cash drawer daily to assure accuracy in transactions and notifies supervisor regarding any outages. Appropriately applying policies.	✓
10%	Delivering exceptional service to new and existing customers by accurately and efficiently opening a variety of financial accounts. Open personal and business accounts, including checking, savings, certificates of deposit (CDs), IRAs, and money market accounts, in accordance with internal procedures and regulatory guidelines (e.g., CIP, BSA/AML). This role helps identifying customer needs and recommending appropriate banking products and services to help deepen new and existing relationships.	✓
10%	Respond to account-related inquiries, resolve discrepancies, and escalate issues as necessary to ensure customer satisfaction.	✓
10%	Collect, verify, and input required customer identification and documentation. Ensure all forms are completed accurately and signatures obtained. Maintain compliance with all applicable banking regulations and internal controls. Maintain accurate records and update customer information in core banking systems. Process account maintenance such as address changes, beneficiary updates, and ownership changes.	✓

WEIGHT	DESCRIPTION	ESSENTIAL
5%	Create and maintain a clean, neat, pleasant work environment by maintaining a professional look (i.e. dress, posture, attitude, etc.), positive outlook and behavior toward customers and co-workers.	✓
5%	Assist other departments and branches with transactions as needed, provide support for the department and branch managers in fulfilling customer requests and merchant verifications. Other duties assigned.	✓
□	Must comply with all company policies and procedures, applicable laws and regulations, including but not limited to, the Bank Secrecy Act, the Patriot Act, and the Office of Foreign Assets Control.	✓

Knowledge and Skills

EXPERIENCE

Cash handling and customer service experience is strongly preferred.

EDUCATION/CERTIFICATIONS/LICENSES

High school diploma or equivalent

INTERPERSONAL SKILLS

Excellent interpersonal and communication skills.

OTHER SKILLS

Proficient with Microsoft Office and Technology. High attention to detail, organizational skills, and ability to handle confidential information

ADA Requirements

PHYSICAL REQUIREMENTS

Perform primarily sedentary work with limited physical exertion and regularly lifting cash box of up to 10 lbs. and coin bags up to 30 lbs on occasion. Must be capable of climbing / descending stairs in emergency situation. Must be able to operate routine office equipment including telephone, copier, facsimile, and calculator. Must be able to stand for long periods of time. Must be able to routinely perform work on computer for an average of 6-8 hours per day, when necessary. Must be able to work extended hours whenever required or requested by management. Must be capable of regular, reliable and timely attendance.

WORKING CONDITIONS

Must be able to routinely perform work indoors in climate-controlled shared work area with minimal noise.

MENTAL AND/OR EMOTIONAL REQUIREMENTS

Must be able to perform job functions independently or with limited supervision and work effectively either on own or as part of a team. Must be able to read and carry out various written instructions and follow oral instructions. Must be able to speak clearly and deliver information in a logical and understandable sequence. Must be able to use basic math skills and spell accurately up to a highschool graduate level. Must be capable of dealing calmly and professionally with numerous different personalities from diverse cultures at various levels within and outside of the organization and demonstrate highest levels of customer service and discretion when dealing with the public. Must be able to perform responsibilities with composure under the stress of deadlines / requirements for extreme accuracy and quality and/or fast pace. Must be able to effectively handle multiple, simultaneous, and changing priorities. Must be capable of exercising highest level of discretion on both internal and external confidential matters.