

## JOB DESCRIPTION

**JOB TITLE:** Customer Service Representative  
**DEPARTMENT:** Retail Banking  
**REPORTS TO:** Retail Branch Manager or Region Retail Services Coordinator  
**FSLA Status:** Non-Exempt

**POSITION SUMMARY:** Performs teller duties, both routine and complex, accurately and professionally. Assists with customer inquiries/problem solving. Willingly rotates between region locations, as needed.

### **PRIMARY ACCOUNTABILITIES AND RESPONSIBILITIES: (95%)**

- (65%) 1. Functions as an experienced, fully trained Teller, receiving and processing Teller transactions accurately and timely. Follows Bank procedures when performing transactions on teller machine and other required equipment such as encoder, CRT.
- (15%) 2. Cross sells and/or refers Bank products and services to specific customers through needs identification, maximizing profitable relationship.
- (5%) 3. Verifies and balances assigned cash drawer daily with minimal cash variances. Assists in reconciling errors or discrepancies for self and other tellers. Maintains adequate cash and/or cash drawer limits as required by Bank policy.
- (5%) 4. Opens night deposit vault and ensures contents are processed using dual control at all times. Balances ATM, replenishes cash supply and ensures ATM is working.
- (5%) 5. Issues cashiers checks, money orders and bank checks. Redeems savings bonds. Processes incoming mail transactions and counts, wraps and bags coin.

### **SECONDARY DUTIES AND RESPONSIBILITIES: (5%)**

- 1. Rents/grants access to safe deposit boxes. Verifies access authority against safe deposit contracts for each request exercising prescribed controls. Check booth or conference room after each use. Accepts and processes payments for new boxes, renewals, drilling fees and lost key fees. Input safe deposit information to manual and computer system according to established procedures.
- 2. Other duties as may be assigned.

*The statements contained in this job description describe the general nature and level of work being performed by the person accepting this role. "Secondary Duties and Responsibilities" are considered incidental or secondary to the overall purpose of the job. This job description does not state or imply the only duties and responsibilities assigned to this job. Employees holding this job will be required to perform any other job-related duties requested by management. All job requirements are subject to possible modification to reasonably accommodate individuals with a disability.*

### **ROLE QUALIFICATIONS:**

#### **Education**

- High school diploma or general education degree (GED) plus additional bank-related training

#### **Experience**

- 2-3 years related cash handling experience and/or training
- Or equivalent combination of education and experience
- Understanding of regulatory compliance

- Thorough product knowledge

**Other Skills/Characteristics**

- Versatile and flexible
- Ability to multi task
- Ability to stand for extended periods of time
- Accuracy/good math skills
- Dependable
- Ability to uphold confidentiality
- Professional in appearance and in verbal communication

**Performance Measures**

- Balances efficiently and accurately, with quarterly offages < \$10; number of offages not balancing to GL <\_\_\_\_ (TBD)
- Drawer limits do not exceed \$4000.
- Willingly travels to/from other locations within region, as needed.
- Proactively initiates customer greeting, addressing customer by name with smile and direct eye contact.
- Maintains confidentiality of customer account information. Follows established policies and procedures in responding to inquiries and requests.
- Cross sells additional products/services based on customer profile and customer need.
- Willingly participates in bank training, including sales and service training.
- In compliance with all regulations and bank policies related to job duties.

By signing below, I acknowledge I have read and understand the Job Description above.

Employee Signature\_\_\_\_\_ Date\_\_\_\_\_