

Job Title: Traveling Branch Float
Job Type: Union
Exemption Status: Non-Exempt
Pay Level: Appendix A - Level 6
Appendix B – Level 7
Reports to: Regional Branch Manager

Position Summary:

Depending on operational demands, will provide assistance and back up support to various areas within the credit union.

- *This position is part of the Friday / Saturday rotation schedules, late Friday's possible when working at Transit Road.*

Essential Duties and Responsibilities:

Specific duties to include, but not limited to the primary functions of:

1. Member Services Representative
2. Share Draft Representative
3. Teller Duties
4. Member Tele-Service Representative
5. Receptionist
6. Switchboard Operator
7. ATM Representative
8. Operations Clerk
9. Member Service Float
 - Handle member account transactions including, but not limited to: deposits, withdrawals, loan transactions, and funds transfers, sale of money orders, gift cards, travel money cards, amusement park tickets and teller checks.
 - Maintain cash box at a predetermined dollar level.
 - Maintain constant recognition of the vulnerability of handling cash; periodically review security procedures and maintain high awareness of actions to take during and after a criminal attack or other emergency situation.
 - Call unusual circumstances and exceptional cases to the attention of the Teller Team Leader or Branch Team Leader to obtain approval for proper disposition.
 - Assist in keeping address changes up to date.
 - Responsible for processing required government reporting.

EOE Race/Sex/Vet/Disability

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Essential Duties and Responsibilities continued:

- Open new accounts, including but not limited to new member accounts; share drafts; share certificates; IRA accounts, direct deposits business accounts and HSA accounts. File maintenance on above items.
- Process membership/ATM card orders and PIN requests. Perform various ATM duties as needed.
- Explain and educate member regarding the Overdraft Privilege Program and maintains necessary paperwork per member request.
- Process CURTIS/OASIS PIN requests.
- Investigate and initiate correction of member complaints and/or errors.
- Responsible for stop payments, certifying checks, checks by collection, ordering shared draft copies, counter checks and processing “Letters of Protest”.
- Perform Front Desk duties as required.
- Make sure daily mail is posted and ready for drop-off before leaving each day.
- Provide, in person or by telephone, routine information concerning credit union services or policy, including: what is a credit union; eligibility for membership; how to apply for membership; type of accounts available; insurance coverage on shares and loans; Interest rates charged on loans; how we compute interest rates on loans; how we compute dividends on shares; how to start, stop or change a payroll deduction; the location of the offices; office hours and telephone numbers.
- Process of U. S. Savings Bonds.
- Process files related to death claims.
- Has a thorough knowledge of products and services and educates members of their availability.
- Adhere to safe work practices and procedures.
- Be neat, punctual and professional in appearance and demeanor.
- Always represent the best interests of the Credit Union in words and actions.
- Complete all required training.
- Other duties as assigned.

Required Knowledge, Skills and Abilities:

- Employee should be accurate in handling cash and recording daily transactions.
- Has a thorough knowledge of interest rates and dividends, how they are computed and disclosed, and is capable of discussing this with the member.
- Employee must be able to communicate effectively (verbally & in writing) and generate grammatically correct written reports, letters, memorandums, etc.
- Employee must possess mental alertness, punctuality and neatness in appearance.

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Required Knowledge, Skills and Abilities continued:

- Employee must maintain a cooperative attitude with other employees and help to maintain the friendliest atmosphere possible in the credit union office.
- Must strive to render the best possible service to all the membership.
- Must keep current with basic knowledge of all credit union programs and must thoroughly cross-sell all credit union products at every available opportunity.
- Must become a graduate of the *Service Plus* program and provide consistent high-quality and memorable service as outlined in the curriculum.
- The ability to properly receive members, either by telephone or in person.
- Employee will follow any instructions, and perform other related duties, as may be required by Management or the Branch Supervisor.
- Computer literate including *Microsoft Office, Word and Excel*.
- Excellent interpersonal communication skills and be able to establish working relationships and interact effectively with a wide range of individuals, members and vendors.

Confidentiality:

Employees are required to maintain the confidentiality of all sensitive Cornerstone CFCU, member, employee, and proprietary information both during and after their employment. If an employee has a question about the confidentiality of a particular matter, they should consult with their Manager/Supervisor or Human Resources. Any violation of this rule may subject the employee to disciplinary action, up to and including termination of employment.

Qualifications:

- High School Degree required; Associates/Bachelor's degree preferred.
- 4 years cash handling experience OR 2 years' experience as a branch teller.
- Bondable upon initial employment and continue to be bondable throughout term of employment.

Physical Requirements:

The functions of the position usually performed sitting but may require some amount of time standing. Some amount of stooping, kneeling, bending, crouching, lifting, walking, carrying and other movements may be required. Tasks involving working on a computer keyboard, typewriter, calculator, cutting, labeling and taping involve extensive wrist and hand movements. All individuals are required to be able to perform these movements without significant risk of injury to themselves or others.

NOTE(S):

Management reserves the right to change or reassign job duties or combine positions based on business needs at any time.

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