

Teller / services Job



Member Description

JOB TITLE: Teller / Member services

REPORTING TO: Manager

GENERAL SCOPE OF ROLE:

The Teller will be accountable to the Manager of the credit union for carrying out a range of administrative and operational activities that contribute to the effective running of the credit union.

MAIN PURPOSE OF THE JOB:

Reporting directly to the Manager, the Teller will provide an efficient service to members within the authorised limits granted by the manager

MAIN DUTIES:

1. To process/deal with members concerning lodgements, loans and withdrawals.
2. To deal with foreign exchange counter transactions and end of day reconciliations.
3. Dealing with all filing of correspondence, photocopying and typing as required.
4. Filing membership application forms, loan applications forms etc.,
5. Filing of promissory notes; withdrawal forms and other documents.
6. Operating computers and other office equipment as required, following appropriate training.
7. General Office work, post, shredding etc
8. Filing of membership application forms; loan application forms; insurance forms etc.
9. Updating members pass books as required.
10. Balancing and Lodging receipts, processing loans within agreed limits set by the management and board.
11. Checking lists of adult and juvenile members and keeping them up to date.
12. Answering the telephone, assisting members with queries and ensuring that telephone messages are passed on to the correct person.
13. Sending emails and distributing incoming emails as required.
14. Opening and distribution of post under the supervision of the manager.
15. Preparing lodgements to be deposited at the bank.
16. Directing members to other credit union personnel as required.

17. Issuing documentation and items of general information to members and non-members as directed.
18. Balancing cash on a daily basis.
19. Through the performance appraisal process, define clear accountabilities, objectives and personal development.
20. Promote positive working environment including being available to members. Be proactive in dealing with issues as you become aware of them and demonstrate a positive attitude in all your dealings with members and other staff.
21. Maintain regular communication with the Manager and the Risk and Compliance Officer and with the Operations Manager, ensuring any issues identified are properly addressed and rectified, or escalated in a timely manner to the Manager.
22. Be conversant with all relevant aspects of the computer.
23. Be conversant with all aspects of LP/LS and DBI claims.
24. Open accounts for and educate new members
25. Responsible for Schools / Youth section
26. Dealing with delinquent members within policy guidelines.
27. Dealing with member queries.
28. Dealing with computer difficulties.
29. Preparation of reports for Treasurer, Manager, Committees and Board.
30. Co-operation with manager in the development and/or implementation of new services
31. To attend training programmes and workshops as required by the credit union.
32. To be aware of and comply with all Health & Safety regulations as directed by the credit union.
33. To attend and contribute to meetings of such committees as may be directed by the Manager and the board of directors
34. To undertake such other reasonable and lawful duties as may be directed from time to time by the manager.

Signed (Employee): _____

Name: _____ Date: _____

Signed (On behalf of the Board): _____

Name: _____ Date: _____

Position: _____