



# Floating Teller/Customer Service Representative

**Department:** Retail

**Job Code:** 116-04

**Reports to:** Branch or Float Pool Manager

**FLSA:** Non-Exempt

**Grade 4; Range \$23,045.28 to \$33,414.86**

**Supervises:** None

**Revised:** 04/07/14

## SUMMARY

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Responsible for supporting various branch locations by performing a variety of customer services, as well as, identifying qualified referrals, adhering to the bank's Service Quality Standards, and complying with regulations/policies/procedures.

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## MINIMUM REQUIREMENTS FOR POSITION:

- High school diploma or equivalent work experience.
  - Previous cash handling/customer service/sales experience in a retail environment preferred.
  - Ability to successfully complete in-house teller training program or other approved training program; completion of in-house customer service training program is required after successfully performing as a teller for six months.
  - Demonstrated skills in the following categories:
    - Customer Service to include customer confidentiality
    - Communication (verbal, nonverbal, written)
    - Well organized and attentive to details
    - Basic computer skills
  - Ability to work all branch hours, including weekends, and evenings required.
  - Must have a valid drivers' license, reliable transportation, and the ability to travel to and from all EVB branch locations.
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## GENERAL ACTIVITIES AND RESPONSIBILITIES:

- Supports accomplishment of branch sales goals by identifying customer needs and promoting/selling the bank's products/services; including, but not limited to, cross selling products/services to expand customer relationships, promoting the bank through community involvement, and referring business to other branch teammates and business partners.
- Handles customer inquiries, including but not limited to, telephone inquiries, research, faxes, producing statement /check copies.
- Adheres to the Retail Service Quality Standards, including, but not limited to, compliance with the bank's dress code and ensuring the teller station is neat and orderly.
- Maintains knowledge of the bank's products/services, pricing, and the bank's customer relationship management software (STAR).
- Completes all assigned training courses in a timely manner and embraces cross training on other responsibilities.
- May provide assistance to Head Teller, Assistant Branch Manager, or Branch Manager to ensure satisfactory audit ratings are achieved at the branch level; including, but not limited to, responsibility for completing portions of the branch's Monthly Internal Control Report (MICR) and creating documentation specific to other operating policies/procedures
- Responsible for adhering to and complying with all Bank policies and procedures, all applicable federal and state laws and regulatory guidance governing financial institutions, including, but not limited to, Federal Deposit Insurance Improvement Act (FDICIA), FACT Act, Bank Secrecy Act and Regulation CC.



- Other such duties may be assigned as needed.

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**TELLER ACTIVITIES AND RESPONSIBILITIES:**

- Performs a variety of customer transactions in accordance with the bank's customer service standards and policies/procedures (i.e. handling deposits, check cashing, loan payments, account holds, telephone/fax inquiries, account research/statement copy requests, stop payments).
- Adheres to cash handling, balancing, and work quality standards as outlined in the Cash Handling, Over/Short, and Teller Accuracy policies.
- Adhere to established teller cash limits and other security controls (i.e. opening/closing policies).
- May assist with ATM and night depository responsibilities, including but not limited to, opening, replenishing, or balancing the branch's ATM.

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**CUSTOMER SERVICE REPRESENTATIVE ACTIVITIES AND RESPONSIBILITIES:**

- Provides complete customer services at the financial institution, including: opening new accounts, explaining bank products and services which are appropriate to customers' needs, and gathering information needed to accurately and efficiently process new and existing accounts.
- Completes arrangements and documents for special services such as foreign currency/items, direct deposits, the origination of outgoing wires, services government bond transactions, and performs other customer services duties, as necessary.
- May perform a variety of administrative functions, including but not limited to, servicing overdrawn/past due accounts (i.e. letters, collections) and new account follow-up (i.e. Thank You letters and phone calls).
- Adheres to and applies the bank's Work Quality (accuracy rating) Standards.