



## **POSITION DESCRIPTION**

**Position Title:** Student Intern/Work Based Learning Position

**Reports To:** Teller Supervisor, Asst Branch Manager, or Branch Manager

**Department:** Branch Operations/Sales

**Status:** Non-Exempt

**Approved:** March 2014

## **SUMMARY:**

The Student Intern reports to the Teller Supervisor, Assistant Branch Manager, or Branch Manager—with support from the Education & Outreach Specialists. Assist members with their financial transactions, involving paying and receiving cash and other negotiable instruments. Initiate and participate in discussions with members about credit union services and products, as well as loan products. Performs other related duties as assigned by Supervisor. Position is also assigned to the campus branch located within their high school, where Interns will serve as Campus Branch Manager and support the Student Tellers with basic financial transactions.

## **ESSENTIAL CAMPUS BRANCH JOB FUNCTIONS:**

1. Open high school campus branch following the defined opening procedures.
2. Supervise Student Tellers assisting members with their basic financial transactions.
3. Assist Student Tellers with balancing of cashbox and close campus branch following the defined closing procedures.
4. Ensure high school campus branch is stocked with all necessary supplies and cash need to support daily operation and inform the Education & Outreach Specialists when reorders are needed.
5. Transport campus branch daily work to assigned branch and process using defined procedures.

## **ESSENTIAL BRANCH JOB FUNCTIONS:**

6. Perform teller functions as needed while following credit union policy, procedures and guidelines. Receive and process customer financial transactions including deposits, withdrawals, and loan payments.
7. Sell money orders and travelers checks to members. Transfer amounts from member accounts and directed and authorized.
8. Open work station promptly at the scheduled time.

9. Post transactions to member accounts and maintain member records. Maintain mastery of data processing menus, activities, and processing that affects the position.
10. Provide routine product, service, and loan information to members and initiate introduction to appropriate Member Service Representative or other employee for transactions. Problems encountered which are beyond authority shall be referred to the supervisor with recommendations.
11. Confirm member identification and financial transactions meet standards required by the credit union prior to performing services requested.
12. Perform a variety of miscellaneous tasks including typing, filing, computer input, and answering the telephone.
13. Must understand and perform Bank Secrecy Act (BSA) functions as applicable to job responsibilities.
14. Attend credit union training sessions, conferences, or seminars as approved by supervisor. Maintain awareness of policies and regulations related to duties and responsibilities.
15. Manage areas of responsibility in a safe and sound manner at all times.
16. Complete all daily tasks; balance assigned teller drawer daily, recording and reporting overage/shortage.
17. Strictly adhere to all security and identification requirements in the performance of all duties assigned.
18. Maintain and protect all sensitive data utilizing the highest standard of confidentiality and professionalism. Consistently display respect for all areas of diversity and levels of knowledge.
19. Keep supervisor advised of status of all major projects as well as concerns.
20. Build positive relationships with members, assess member requirements, and recommend financial solutions.
21. Responsible for proactive referral initiatives. Identify potential member needs and initiate friendly pass-off to Member Service Representative in accordance with established branch standard.
22. Display mutual respect, trust and dignity, acting in the best interest of the credit union. Lead by example by displaying solid ethics and integrity at all times. Control risk and perform duties in a safe and sound manner.

## **SKILLS/ABILITIES**

1. Ability to supervise student peers within the high school campus branches.
2. To provide friendly, professional, personal service to all members.
3. To balance at a high percentage rate consistently.
4. To handle a standard rate of branch/department transactions as determined by supervisor.
5. To troubleshoot and resolve member and internal inquiries in a timely, friendly and accurate manner.
6. Ability to build positive relationships with members. Assess member requirements and recommend financial solutions.
7. Ability to maintain an up-to-date and comprehensive knowledge of all credit union products, services, policies and procedures.
8. Ability to participate in and support a team environment.

9. Ability to display respect for diversity. Treat people with respect, keep commitments, and maintain a high level of integrity.
10. To effectively communicate ideas and information.
11. To possess and display excellent customer service attributes.

## **JOB REQUIREMENTS**

1. Availability to work during some lunches to support schedule campus branch hours of operation.
2. Availability to work some evenings and Saturdays at assigned branch.
3. Ability to attend all required training, including summer and evening training sessions.
4. Have reliable transportation to transport daily work to assigned branch as needed.
5. Proficiency with standard office equipment, MS Office and Outlook software preferred.
6. Demonstrated and sustained interpersonal skills to relate effectively and professionally to members, the public, and colleagues.
7. May be assigned to assist or relocate to other credit union branch locations as necessary.

## **PHYSICAL REQUIREMENTS**

Per the Dictionary of Occupational Titles, this is considered a light to medium capacity position.

- Ability to stand on a frequent basis (31-71%).
- Occasional to frequent walking (11-30%).
- Seldom sitting (1-10%).
- Ability to lift up to 10 lbs. on a frequent basis.
- Ability to lift up to 50 lbs. on a seldom basis.
- Frequent repetitive hand and wrist motions.
- Work environment is indoors in clean, office area.

Gesa Credit Union reserves the right to revise or change the job description as the need arises. This job description is not all inclusive of total job responsibilities nor does it constitute a written or implied contract of employment.

**Gesa Credit Union is an Equal Opportunity Employer and, as such, affirms in policy and practice to recruit, hire, train, and promote, in all job classifications, without regard to race, religion, color, national origin, citizenship, sex, sexual orientation, gender identity, age, veteran status, disability, genetic information, or any other protected characteristic. Gesa Credit Union will not discriminate against persons because of their disability, including disabled veterans, and will make reasonable accommodations for known physical or mental limitations of qualified employees and applicants with disabilities. If you are interested in applying and require special assistance or accommodations due to a disability, please contact our Human Resources department at (509) 378-3100.**