



Job Title: Training Branch Member Service Supervisor
Date Prepared: July 2024
Reports To: Branch Manager
Department: Member Service
Status: Hourly / Non-Exempt
Job Grade: 7

Purpose

The primary purpose of this position is to assist Fremont Federal Credit Union to live our Mission to deliver the Best Advice, Best Service, and Best Products to promote healthy financial living. To accomplish this effort this position must deliver outstanding service to members and team members in alignment with our established Service Standards. A key component of living out our mission is to recommend to members our products and services that will help to promote financial habits. In addition, are responsible for the supervision of the teller area. This position is responsible for onboarding new MSRs including coaching, training, and providing real-time constructive feedback.

Essential Functions

1. Provide practical, on-the-job training, demonstrating transaction processes, cash handling, and use of system software.
2. Evaluate new and current MSRs' skills and understanding through observations, assessments, and feedback sessions.
3. Offer ongoing support, coaching, and mentoring to help employees build confidence and improve their performance.
4. Ensure employees understand regulatory compliance, security procedures, and risk management related transactions.
5. Foster a collaborative environment where employees can learn from experienced team members and share best practices.
6. Deliver outstanding service to both members and team members in alignment with Fremont FCU's Service Standards.
7. Identify member needs and recommend product and service solutions that will promote healthy financial habits.
8. Meet all established performance goals for service.
9. Meet all established sales goals.
10. Develop and maintain effective product knowledge as measured by the annual Product Knowledge Assessment.
11. Supervises the activities of the teller/MSR operations area by assigning work, answering questions, solving problems, helping with complex transactions and sensitive member relations problems. Explains policies and procedures to staff and members.
12. Ensures that staff are trained and cross-trained in all phases of their positions to ensure the delivery of quality service to members and to ensure accuracy in transactions. Trains employees in proper procedures for counting and handling money, checks, and other types of financial documents, balancing, performing off-line functions, handling signatures and customer verifications, preventing frauds, and dealing with robberies. Uses teller / MSR manuals to educate new tellers / MSR's on the credit union's procedures.
13. Familiarizes new employees / MSR's with the types of accounts and services that the credit union provides using brochures and teller / MSR manual during the training process.
14. Assists employees with balancing and verifying teller cash as needed when out of balance.
15. Operates a teller / MSR window via a teller terminal and cash drawer daily to provide the best member service to each member.

16. responsible for performing all required branch cash audits including vault and teller drawers as defined per policy.
17. Verifies large item deposits daily for approval of immediate credit or holds to be placed on accounts, using a teller terminal for account information and adhering to REG CC policy.
18. Balances teller cash daily to the general ledger.
19. Assist Branch Manager with performance appraisals for tellers / MSR's under direct supervision.
20. Responsible for maintaining sufficient balance of currency at all times within established branch and teller drawer guidelines. Also responsible for supply of official checks and money orders.
21. Complies with all BSA / CIP policies. Trains new tellers on BSA / CIP requirements.
22. Responsible for the maintenance of vault cash, it's balancing, and ensuring that adequate cash levels, without being excessive, are on hand to handle teller / MSR and member needs.
23. Responsible for opening and closing offices / branches when applicable.
24. With assistance of one teller / MSR, opens ATM and counts deposits.
25. Performs all supervisory override duties as prescribed by policy.
26. Ensures that policies and procedures adopted by the Board and various committees, which pertain to this area of responsibility, are properly implemented, and effectively administered. Recommends to Branch Manager any changes that may be necessary to the daily operations of the teller/MSR area.
27. Periodically audits cash basis of each teller / MSR. Does surprise cash counts.
28. Prepares reports of all shortages and overages daily. Notifies Branch Manager immediately of all unreasonable irregularities and any cash shortage.
29. Assigns, directs, coordinates and reviews work assigned staff. Supervises and follow-ups on all daily activities.
30. Is responsible for security in the teller / MSR area, ensuring all cash drawers are properly locked and the safe is secured and all alarms are activated.
31. Responsible for scheduling of hours for tellers / MSR's in the department and ensures teller area is manned and ready for business throughout the day.
32. Responsible for keeping tellers / MSR's supplied with sufficient supplies and forms to process daily activities.
33. Runs START and FINISH procedures if needed.
34. Balance and maintain records and report sales for money orders.
35. Order, receive, and verify Corporate One, 5/3 Bank cash. Also tagging bags of loose coin and preparing documentation for shipment of coin to 5/3 Bank cash vault.
36. Dispense and receive teller cash.
37. With assistance of one teller / MSR removes night drop entries daily from depository. Verifies and records in log.
38. Cross sell credit union products and services.
39. Maintains regular and Reliable attendance.

Other Duties

1. Assist in looking up statements or checks in OnBase.
2. Provides a weekly lunch and balance schedule to ensure proper staffing of the teller / MSR area.
3. Reviews all supply request for the Teller / MSR area for accuracy and completeness.
4. Assist with special projects in the department as needed.
5. Keeps work area neat and organized. Keeps all confidential documents out of sight.
6. Assist with other departments/branches when needed as instructed by Branch Manager.

Qualifications

These specifications are general guidelines based on the minimum experience normally considered essential to the satisfactory performance of this position. The requirements listed below are representative of the knowledge,

skill, and/or ability required to perform the position satisfactorily. Individual abilities may result in some deviation from these guidelines.

Preferred Experience

High School Diploma or equivalent required with a minimum of two years' experience in the Teller Operations and Supervisory area, and one year cash handling experience.

Skills/Abilities

Must be familiar with teller / MSR functions including experience in the member service area. Supervisory skills. Well-developed verbal communication skills for interaction with members and co-workers daily. Must have empathy and patience when dealing with unhappy members and employees, enabling them to vent without interruption. Well-developed member relations and interpersonal skills necessary for coordinating department schedules and activities, and handling co-worker problems. Accurate data input skills. Knowledge of credit union products, services, policies, and principles. Ability to operate adding machine. Accurate data input skills. Knowledge of Federal and State laws and regulations governing checking and savings accounts practices. Ability to work on more than one task at a time. Ability to organize and prioritize tasks in a flexible environment. Ability to work independently with minimal supervision.

Basic knowledge of Microsoft Office applications including Outlook, Excel, and Word.

Advanced skills in using computers and related equipment, 10-key calculator, multi-line telephone/intercom systems, and a variety of general office equipment including copy machines, scanners, and fax equipment. Maintain a high degree of confidentiality in dealing with various credit union, and member information. Light travel is required. Travel to various branch locations or to off-site trainings may be necessary on occasion. Availability to work FFCU posted hours. Flexible, irregular hours as needed.

Decision Making

Determine steps and actions necessary to resolve member questions and problems. Ability to determine on a case-by-case basis which checks require CC holds.

Financial responsibilities

This position has a very high financial responsibility, verifying and balancing thousands of dollars a day in a cash drawer and the vault. Responsible for the approval of large deposits daily for immediate availability of funds, or holds, as appropriate. Extremely high impact on the organization if errors are made in this position. Constant out of balances or large one time out of balance in cash drawer or the vault could result in loss of accounts to the credit union and reputation of the credit union image tarnished. Approval of large checks, which are later uncollectible, could result in loss of money to the credit union.

Fraudulent transactions which could have been detected by controls such as verifying I.D. or signature card could result in loss of money to the credit union. Other controls include verifying everything on the Branch-End-of-Day schedule paperwork to make sure each transaction balances.

SUPERVISORY RESPONSIBILITIES

Supervises full and part-time MSRs.

Physical Requirements

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Performing work through repetitive eye/hand coordination. Write using pen/pencil or personal computer keyboard daily. Must be able to communicate through speaking and hearing and use visual acuity for examining and reading documentation. Position is required to sit, pull, push,

reach, and use repetitive hand motions. Position may be required to work long or unusual hours on occasion. Ability to work overtime, attend meetings, seminars, and travel.

Working Conditions

Work is performed primarily indoors with some potential for exposure to safety and health hazards related to electronics work. May require periodic travel between branches. There is exposure to potentially hazardous conditions such as robbery. Employees are to receive detailed instructions and procedures to follow to minimize risk. In accordance with the American with Disabilities Act, it is possible that requirements may be modified to reasonably accommodate disabled individuals. However, no accommodations will be made which may pose serious health or safety risks to the employee or others or which impose undue hardships on the organization.

Work Authorization

FFCU requires that all employees be legally authorized to work in the United States, and it abides by all laws that prohibit the employment of undocumented foreign nationals. Any person employed must complete the federal Employment Eligibility Verification Form (I-9) within three days of hire.

Equal Opportunity

FFCU provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, ancestry, national origin, gender, gender identity, sexual orientation, marital status, religion, age, disability, results of genetic testing, or service in the military. Equal employment opportunity applies to all terms and conditions of employment.

Diversity Statement

FFCU is committed to creating and maintaining a workplace in which all employees have an opportunity to participate and contribute to the success of the business and are valued for their skills, experience, and unique perspectives. This commitment is embodied in FFCU policy and the way we do business.

Other Duties

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities, and activities may change at any time with or without notice.

Employee Signature: _____

Employee Print Name: _____

Date: _____