

# JOB DESCRIPTION FORM

**Job Title:** Customer Service Representative

**Employee Name:**

**Department:**

**Reports To:**

New     Revised

**Date:** \_\_\_\_\_

HR Approved	Date	Position Group	
Grade	Position Class	Exempt	Security Sensitive
		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

**I. PURPOSE OF THE JOB (What are the end results or objectives of the position? Why does the job exist)**

The Customer Service Representative (CSR) is the primary point of contact for bank customers. The objective of the CSR is to perform daily transactions for customers while providing efficient and quality customer service. Additionally, as the primary point of contact, it is necessary for the CSR to create opportunities for cross-selling the bank's products and services in order to meet customer needs and grow the bank.

**II. PRIMARY FUNCTIONS AND RESPONSIBILITIES (What duties are required for the position to exist? (List no more than 6))**

1. Promotes the Bank's products and services and refers customers to the appropriate sales personnel. Answers customers' routine banking questions; refers complex inquiries to management
2. Receives, pays out monies, and processes daily transactions including deposits, withdrawals, check cashing and payments, maintaining an accurate record of all transactions
3. Balances cash drawer and transactions to teller system with minimal assistance, and maintains an acceptable difference record
4. Assists with support work including, but not limited to, night drop, ATM balancing, safe deposit box, debit card set up, Branch capture, and preparing courier bags for transit
5. Performs various clerical duties including answering phone, typing, filing and preparing check orders
6. Ensures compliance/adherence to all policies, procedures and federal regulations in order to attain a satisfactory or better branch audit. Maintains confidentiality of all customer records and documents

**III. SECONDARY FUNCTIONS INCLUDE (Responsibilities/important duties performed occasionally or in addition to the essential duties of the position.) (List no more than 3)**

1. Open and close accounts to assist with the platform staff
2. Floating/Covering shifts—both within assigned branch location and at other branch locations
3. Attend all required branch meetings, bank business meetings and activities

**IV. SUPERVISORY RESPONSIBILITIES (Provide the number and type of employee supervised, level of authority to hire and fire or to make recommendations.)**

None

## **V. REGULATORY RESPONSIBILITIES**

Comply with all State and Federal Regulations, the bank's Board approved policies and management approved procedures as they relate to your job function. Complete assigned Compliance courses in a timely manner.

Support the bank's Anti-Money Laundering Program by: completing assigned Bank Secrecy Act/Anti-Money Laundering (BSA/AML), Customer Identification Program (CIP) and Office of Foreign Assets Control (OFAC) courses in a timely manner; and complying with the bank's Board approved BSA/AML, CIP and OFAC policies and related management approved procedures.

Maintain records for courses involving compliance with State and Federal laws that are not assigned by the compliance department to provide evidence of compliance with the above laws, policies and procedures. Supervisors or the employee attending such training is responsible for ensuring that evidence of training is submitted to Human Resources for archival in the employee's file.

## **VI. KNOWLEDGE AND EQUIPMENT PROFICIENCY (Indicate which are required, preferred, or desirable. Include licenses and certificate.)**

- Intermediate computer skills (Microsoft Office and Outlook)
- Perform basic mathematical functions
- Complete all required Regulatory University training and exams
- Ability to maintain composure while dealing with difficult customers
- Ability to work as part of a team and assist other team members
- Excellent interpersonal communication and customer service skills
- Ability to adapt to change
- Attention to detail and ability to multi-task
- Be professional in appearance and conduct
- Ability to pay attention to detail and quality of work

## **VII. PHYSICAL EFFORT**

KIND: Standing, walking, bending, and sitting for extended periods. Occasional lifting up to a maximum of 50lbs

## **VIII. OTHER**

Management retains the right to add to or change the duties and requirements of this position at anytime. This job description supersedes all prior job descriptions.