



Cashmere Valley Bank

Customer Service Representative Teller I, II, III, IV

Location: Chelan, WA

Department: Lake Chelan Branch

FLSA Status: Non-Exempt

Grade/Level: \$19.00 - \$25.73

Work Schedule:

Available to work Monday through Friday from 8:00 am to 6:00 pm with overtime as necessary.

Job Status: Full Time

Reports To: Branch Retail Operations Officer

Amount of Travel Required: Occasional

Positions Supervised: None

Benefits: medical, dental, vision, prescription, life, AD&D, long term & supplemental insurance, EAP, 401k match & profit sharing, accrue 8 hours of sick & vacation monthly, 11 annual paid holidays

POSITION SUMMARY

Processes a variety of customer transactions and cross sells bank services to new and existing customers. Supports and contributes to Cashmere Valley Bank's goal of providing the highest, quality customer service.

ESSENTIAL FUNCTIONS

Reasonable Accommodations Statement

To accomplish this job successfully, an individual must be able to perform, with or without reasonable accommodation, each essential function satisfactorily. Reasonable accommodations may be made to help enable qualified individuals with disabilities to perform the essential functions.

Essential Functions Statement(s)

- Receive checks and cash for deposit, verify amounts, examine checks for proper endorsement and negotiability. Review checks for fraud and notify Supervisor if suspicious. Follow cash handling procedures to minimize customer impact and offages.
- Cash checks and process withdrawals after verifying customer identity. Confirm written and numerical amounts agree, information is accurate and the check is endorsed properly. Obtain Supervisor approval if account has insufficient funds or check is suspicious.
- Greet each customer and make eye contact, displaying good customer service and following security procedures included in SAFECATCH. Report any unusual activity to Supervisor immediately.
- Accurately complete requests from customers including cashiers checks, money orders, check orders, account closures, address changes, wires, Directos, ACH, AFT, debit cards, stop payments, online banking, etc.
- Personally utilize Bank products, such as online banking, mobile app, debit card, etc, to better assist customers.
- Actively explain, promote and cross sell additional products and services a customer may need. Identify opportunities to refer customers to New Accounts, insurance agents, financial advisors, lenders or other departments as the situation warrants.
- Process mail transactions and night deposit bags. Prepare and process change requests. Process side duties in a timely manner, such as CAR/LAR, held mail etc. Stock teller stations and customer podiums with forms and supplies.
- Maintain currency levels in teller window within established teller limit. Balance cash drawer at least weekly and report any discrepancy to the Supervisor.
- Answer phones timely and professionally, asking questions before referring a customer to another department to ensure they're being transferred appropriately.
- May fill in at other branches needing coverage.
- Adhere to all policies, procedures and regulatory compliance requirements for Cashmere Valley Bank.
- Regular, in person attendance is essential.
- Model and uphold the Mission Statement of Cashmere Valley Bank.
- Other duties as assigned. Job descriptions and duties may be modified if deemed necessary by management.

POSITION QUALIFICATIONS

Competency Statement(s)

- Accountability - Ability to accept responsibility and account for his/her actions.
- Accuracy - Ability to perform work accurately and thoroughly.
- Communication, Oral - Ability to communicate effectively with others using the spoken word.
- Communication, Written - Ability to communicate in writing clearly and concisely.

- Confidentiality - Keep all customer financial information strictly confidential.
- Customer Service - Ability to demonstrate continuous quality customer service to internal and external customers.
- Decision Making - Ability to make critical decisions while following company procedures.
- Detail Oriented - Ability to pay attention to the minute details of a project or task.
- Ethical - Ability to demonstrate conduct conforming to a set of values and accepted standards.
- Friendly - Ability to exhibit a cheerful demeanor toward others.
- Honesty / Integrity - Ability to be truthful and be seen as credible in the workplace.
- Initiative - Ability to make decisions or take actions to solve a problem or reach a goal.
- Interpersonal - Ability to get along well with a variety of personalities and individuals.
- Judgment - The ability to formulate a sound decision using the available information.
- Multi-task - Ability to prioritize, manage and perform multiple tasks as warranted.
- Organized - Possessing the trait of being organized or following a systematic method of performing a task.
- Professionalism - Practice a high degree of professionalism with a positive attitude.
- Relationship Building - Ability to effectively build relationships with customers and co-workers.
- Reliability - The trait of being dependable and trustworthy.
- Self Motivated - Ability to be internally inspired to perform a task to the best of ones ability using his or her own drive or initiative.
- Team Player - Contribute to an overall team effort by being an effective team player.
- Time Management - Ability to utilize the available time to organize and complete work within given deadlines.
- Training - Successful completion of all in-house and off-site training as required.

SKILLS & ABILITIES

Education: High School Graduate or General Education Degree (GED): Required

Experience: None

Computer Skills: Ability to operate a variety of office equipment including computers.

Certifications & Licenses:

Other Requirements:

PHYSICAL DEMANDS

- N (Not Applicable) Activity is not applicable to this position.
 O (Occasionally) Position requires this activity up to 33% of the time (0 - 2.5+ hrs/day)
 F (Frequently) Position requires this activity from 33% - 66% of the time (2.5 - 5.5+ hrs/day)
 C (Constantly) Position requires this activity more than 66% of the time (5.5+ hrs/day)

Physical Demands		Lift/Carry	
Stand	C	10 lbs or less	F
Walk	C	11-20 lbs	F
Sit	O	21-50 lbs	O
Manually Manipulate	C	51-100 lbs	N
Reach Outward	C	Over 100 lbs	N
Reach Above Shoulder	F		
Climb	O	Push/Pull	
Crawl	O	12 lbs or less	F
Squat or Kneel	O	13-25 lbs	F
Bend	O	26-40 lbs	O
Grasp	C	41-100 lbs	O
Speak	C		

Other Physical Requirements

- Vision (Near, Distance)
- Sense of Sound - Ability to hear customers and employees.
- Sense of Touch
- Sense of Balance

WORK ENVIRONMENT

Cashmere Valley Bank's work environment is generally considered low risk in environmental conditions such as extreme noise, heat, cold or atmospheric exposures. The possibility for personal injury is low.

The company has reviewed this job description to ensure that essential functions and basic duties have been included. It is intended to provide guidelines for job expectations and the employee's ability to perform the position described. It is not intended to be construed as an exhaustive list of all functions, responsibilities, skills and abilities. Additional functions and requirements may be assigned by supervisors as deemed appropriate. This document does not represent a contract of employment, and the company reserves the right to change this job description and/or assign tasks for the employee to perform, as the company may deem appropriate.