

**Ideal Credit Union**  
**Structured Compensation - Job Description**  
**Lead Teller**

Data Year: 2025

Prepared On: 03/05/2025

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Department:	Cash Service	Grade:	7
Reports To:	Branch Mgr/Mgr of Cash Operations/Cash Supervisor	Classification:	Non-Exempt
Supervises Direct:	0	Supervises Indirect:	0
Approved By:	SVP Member Experience	Effective Date:	01/01/2010
		Revised Date:	11/20/2024

**Role:**

To ensure members receive friendly, accurate, and timely assistance.

**Essential Functions & Responsibilities:**

- E 25% Welcomes members, offers routine information about services, and directs them to the relevant departments for specific inquiries. Processes member financial transactions including deposits, withdrawals, loan payments and transfers, while ensuring accurate accounting and maintaining a balanced cash drawer. Handles daily transactions with precision and efficiency.
- E 25% When applicable is responsible timely opening and closing of branch and securing the facility. Ensures the reconciliation of Cashboxes within Cash Services, encompassing Cash Vault, Coin Machines, TCRs, and ATMs. This responsibility extends to reconciling branch totals as well. Coordinates the ordering of cash from the Federal Reserve Bank and facilitates the sale of cash to the Federal Reserve.
- N 15% Promotes Credit Union Products and Services through cross-selling initiatives to achieve individual targets, with a focus on contributing to overall branch goals.
- N 15% Supports training and supervision of newcomers including but not limited to Teller I and Teller II, coordinating their activities, and consistently offering feedback to the Supervisor.
- N 10% Cultivate a positive and cooperative work environment among teller staff, fostering a culture of collaboration. Demonstrates the ability to implement and support changes aimed at enhancing overall efficiency and elevating member service standards.
- N 5% Performs a variety of miscellaneous tasks including filing, computer input and answering the telephone, supply management by ensuring adequate stock levels and timely replenishment. Performs other duties as assigned.
- N 5% Complete all compliance regulation tests with a passing score of 80% or above, participate in Compliance training offered at Ideal Credit Union. In addition to completing the required Regulations to attend Service Knowledge meetings on a monthly basis.

**Performance Measurements:**

1. To maintain a high skill level among tellers, schedule tellers to meet member demand at a minimum of cost.
2. To provide friendly, professional, personal service to all members.
3. To balance at least 99% of the time, being no more than \$10.00 off and with total offages not to exceed \$100.00 in a 2 month period.

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4. To handle an average of at least 10-20 transactions per hour (based on location).
5. To have no more than two posting errors in a year.
6. To successfully recommend a new product or service to 50% of all members you work with.
7. Assist branch efforts in community involvement (Examples: Parades, Community Day's or Events) this may mean working and/or volunteering hours.
8. Complies with Bank Secrecy and the AML Act, as well as completes all required compliance testing.

**Knowledge and Skills:**

Experience	One year to three years of similar or related experience.
Education	Equivalent to a high school education.
Interpersonal Skills	Courtesy, tact, and diplomacy are essential elements of the job. Work involves much personal contact with others inside and/or outside the organization for purposes of giving or obtaining information, building relationships, or soliciting cooperation.
Other Skills	Must have good communication skills for training other tellers. 10-key calculator and computer keyboard skills. Accurate with numbers and names.
Physical Requirements	This position involves standing for extended periods of time, but may also involve sitting occasionally. Exerting up to 20 pounds force on objects by means of lifting, carrying, pushing or pulling may be occasionally required. Typing or otherwise working primarily with fingers and wrists rather than with the whole hand or arm is required on a continual basis. Expressing or exchanging ideas by means of the spoken word, ability to receive detailed information through verbal and written communication, and the ability to see with or without corrective lenses are all necessities of this position on a continual basis.
Work Environment	Office environment, which may include working extra hours and weekends, overtime, rotating shifts, and may be stressful at times.

**Acknowledgment**

The above information on this description has been designed to indicate the general nature and level of work performed by employees within this classification. It is not designed to contain or be interpreted as a comprehensive inventory of all duties, responsibilities and qualifications required of employees assigned to this job.

**This Job Description is not a complete statement of all duties and responsibilities comprising the position.**

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Printed Employee Name

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Date

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Employee Signature