

Department: Administrative	Job Description
Job Description Title: Administrative Assistant/Receptionist	FLSA Status: <i>Non Exempt</i>
Reports To (Title): Teller Supervisor	Position Status: (Full-time, Part-time, Temporary)
Prepared By: Associated Employers	Revision Date: January 2023

Job Summary:

Under general supervision of Management, but in accordance with established policies and procedures, the Administrative Assistant/Receptionist is responsible for projecting a positive image as a representative of the credit union in greeting visitors, guests and members. In performing customer reception activities will coordinate and direct lobby/phone traffic while providing prompt, professional and accurate assistance to members. This position will perform a variety of duties within the credit union while providing confidential, professional, administrative and clerical support to the Credit Union management. Courses and/or training may be required.

Essential Duties and Responsibilities and Expectations:

Include the following, other duties may be assigned.

- Answer incoming telephone calls, maintain positive demeanor, ensure phone coverage, determines purpose of calls, and forward calls to appropriate personnel or department; perform telephone transfers for members as needed.
- Provide information to callers; respond to all telephone inquiries about rates, services, loans, checking accounts, hours of business, etc., while complying with disclosure requirements, regulations and consumer privacy policies.
- Maintain a professional manner when greeting visitors, members/potential members to establish rapport, determine nature of their business, and announce visitors to appropriate personnel.
- Ensure knowledge of staff movements in and out of the building, monitor visitor access and maintain security awareness
- Provide general administrative and clerical support
- Receive and accurately sort mail and deliveries; and deliver all incoming mail to the proper recipient, prepare all outgoing mail and ensure mail is stamped correctly and is picked up by the mail service. This includes UPS, Fed Ex and certified mail.
- Tidy and maintain the reception area
- Fulfill branch requests for posters and in branch material, coordinate printing in support of credit union goals and events.
- Primary back up for Teller line when staff shortage occurs
- Assists in coordination of supply orders
- Promote usage of Credit Union products and services
- Coordinate with other departments and refer members to departments/personnel providing specialized services as necessary.
- Maintain an up-to-date and comprehensive knowledge on all Credit Union related policies, procedures, rules and regulations, including but not limited to Bank Secrecy Act, Fair Lending, Know Your Member, robbery, safety and security procedures.
- Follow all credit union policies and procedures; adheres to State and Federal Banking regulations.
- Represent the credit union in a positive and professional manner with all people including fellow employees, members, management, board members and outside vendors.
- Attends and participates in meetings as required.

- Completes required courses as assigned for ongoing compliance and continuing education.
- May be requested to travel to other branches, or facilities.
- Report to work on time each scheduled day.

Supervisory Responsibilities:

No requirement

Qualification Requirements:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Education and/or Experience:

- 1-3 yrs. clerical/administrative experience and/or training
- 2 yrs. financial institution experience preferred
- Equivalent combination of education and experience
- Related work experience may substitute for education

Language Skills

- Ability to read, comprehend and write simple instructions, short correspondence, and memos.
- Ability to read, analyze, and interpret common organization industry events, journals, financial trends, and consumer oriented issues.
- Sensitive to executive etiquette and protocol; able to communicate with a high degree of poise and tact when dealing with all levels of visitors to the credit union.
- Effective communications and listening skills; possesses good written communication skills.
- High comfort level when working with board level executives.
- Ability to effectively present information on one on one and small group situations to members, and other employees of the credit union.

Mathematical Skills:

- Knowledge of basic arithmetic.

Reasoning Ability:

- Ability to apply common sense understanding to carry out instructions furnished in written, oral, or diagram form.
- Ability to deal with a variety of variables under only limited standardization.
- Fundamental working knowledge of concepts, practices and procedures and ability to apply in varied situations

Certificates, Licenses, Registrations

- Bondable with CUMIS
- Valid/Unexpired Driver's License

Other Skills and Abilities

- Working Independently— Work progress is monitored by supervisor/manager; incumbent follows policies and procedures, and may set priorities and organizes work within general guidelines established by supervisor/manager.
- Customer and Personal Service — Knowledge of principles and processes for providing customer and personal services. Possess strong human relations, communication and organization skills, this includes customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction. Excellent telephone skills.
- Clerical — Knowledge of administrative and clerical procedures and systems such as word processing, managing files and records, and other office procedures and terminology.
- Interacting with Computers — Using computers and computer systems (including hardware and software) to enter data, or process information.
- Getting Information — observing, receiving, and otherwise obtaining information from all relevant sources.
- Working directly with the Public — Face to face and phone contact to acknowledge and complete transactions for members and guests.
- Ability to use common office equipment such as computer, fax machine, copier, telephone, etc.
- Familiar with differences in a basic number of products and services offered by other financial institutions to those offered by the credit union.

Physical Demands & Working Conditions:

The work environment characteristics and the physical demands described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The noise level in the work environment is usually moderate, as is found in a normal business office with computers and printers, and light traffic.

Employee may be exposed to contagious illnesses such as colds and flu by virtue of working with the general public.

Employee may be asked to participate in outdoor activities related to the season for example snow shoveling and de-icing of sidewalks in winter and landscape maintenance during other seasons, weeding, replanting of flowerbeds, etc., as these relate to the overall Branch Office appearance and safety needs.

Employee may be asked to participate/coordinate off-site/after-hours credit union activities including but not limited to: Annual Meeting/Dinner, Member Appreciation Day(s) and Credit Union Chapter Meetings, etc. Travel may be necessary.

While performing the duties of this job, the employee is frequently required to stand, perform repetitive hand motion (such as typing); reach with arms and hands; hear; listen; talk; walk; bend and sit.

Employee must frequently or regularly be able to lift 10 pounds and occasionally be able to lift and/or move up to 50 pounds. Specific vision abilities required by this job include close vision and ability to adjust focus.

The above statements are intended to describe the general nature and level of work being performed by the individual assigned this position. This job description is not intended to be an exhaustive list of all responsibilities, duties and skills of the personnel in those positions(s).

I have read and accept the duties and responsibilities as outlined. I have also been given the opportunity to discuss any questions or concerns regarding any or all of the above directly with my supervisor prior to signing this document. Further, I agree to notify my supervisor immediately in the event that I am unable to fulfill any or all of the duties as outlined above.

*I understand that **Southwest Montana Federal Credit Union** reserves the right to revise or change this job description as the need arises.*

I have reviewed this job description and received a copy.

Employee Signature/Date