

## **Electronic Banking Clerk - Job Standards**

Job Standards include: (Note: this is a representative list only - complete list provided with purchase)

### KNOWLEDGE OF WORK:

- Understands how Electronic Banking (EB) processes work; how to efficiently use EB systems and equipment; and the required processes for making EB services available to customers.
- Understands the mission, culture, general operating functions and security needs of the organization, its unique operating environment, and how to resolve user problems and concerns.
- Knows how to handle EB transactions and resolve transaction disputes. Knows protocols for issuing plastic cards, hot carding, restricting use, adding new users and connecting with third parties involved in EB transactions and activities.
- Has detailed knowledge about the organizations products and services and can provide quick and accurate information to callers on how to productively utilize EB services.

### QUALITY OF WORK:

- Accurately responds to customer inquiry with correct information about callers accounts, new product or services inquiry, updating account information and initiating appropriate EB transactions or authorizations for customer.
- Prepares appropriate forms, documents, letters, electronic mail transmissions and other data required for responding to and correctly processing all EB transactions in a timely manner.
- Maintains appropriate EB Logs and makes appropriate accounting entries for documenting reconciliation's, payrolls processed, direct deposits received, ATM and other EB transactions,
- Uses time productively in performing tasks and completing departmental projects.

### QUANTITY OF WORK:

- Cross sells products and services to customers, assists fellow employees with EB related issues.
- Invests time and effort in becoming better informed about new products and services, as well as revised or newly instituted procedures and practices, to increase EB customer usage.
- Processes all EB data on a daily basis within the prescribed time constraints and standards for reconciling and recording EB summary data.

### PROBLEM ANALYSIS/RESOLUTION:

- Regularly examines the operational policies and practices of the organization that impact this particular job and looks for ways to improve processes.
- Observes how the organization utilizes technology and how it utilizes people and looks for ways to improvement resource utilization through greater customer use of EB.
- Asks key questions to focus customers on real or implied EB problems, separates issues into individual parts, and proceeds to resolve each real or implied problem in an orderly fashion.