

Mentor Program Procedures

1st Week New Employee Training (5 days)

During this time the New Employee is undergoing training at the Main Office.

- Towards the end of the week the trainer will contact the New Employee's Manager via email regarding the employee's progress. At this time the trainer will also confirm who the Mentor is for the New Employee.
- On Friday, the trainer will email the New Employees Training Evaluation (this will list the dates for follow-up training) to the manager and the Mentor Packet to both the Manager and the Mentor.
- The Mentor Packet will include:
 - New Employee Orientation Form
 - New Employee Supply Checklist
 - New Employee/Mentor Checklist
 - New Employee Evaluation (during Mentor period)
 - Mentor Payroll Form

2nd Week: At the Branch or with Team

During this time the employee is developing their skills with the assistance of their Mentor.

- Mentor and Manager should review the Mentor Packet. Manager should ensure all of the supplies on the list are in order.
- Mentor and Manager should meet with the New Employee and complete the New Employee Orientation Form.
- Mentor should assist the New Employee in completing the Branch Scavenger Hunt and the Who Does What at the Branch exercise (these will not be turned in with the Mentor Packet)

3rd Week: At the Branch or with Team

During this time the employee is developing their skills with the assistance of their Mentor.

- At the end of the week the Mentor, Manager, and the New Employee will complete the New Employee/Mentor Checklist and the New Employee Evaluation signed by the Mentor, Manager, and the New Employee.
- The Mentor Packet will be returned to the Training Team with all the above mentioned forms completed.
- The trainer will send a reminder email to the Manager and the New Employee regarding the details and dates of Gold Medal Service and Sales, Lender, and New Accounts Training. These Instructor Led courses will take place the following week at the Main Office.

4th Week: New Employee Training Continues (1-3 days)

During this time the employee will attend 1 day of Gold Medal Service and Sales (all employees) and 2 days of New Accounts and Lender Training (MSR's and Assistant Managers only) at the Main Office.

- After required training is completed the New Employee will have completed Training and will return to their branch or team. The Mentor will continue to offer assistance and support and will gradually ease back to their normal responsibilities.

New Employee Orientation

New Employee: _____ Mentor: _____

Date: _____ Team: _____

Please review the following information and initial upon completion.

Before the New Employee begins their first day, the New Employee should sit down with the Manager and the Mentor to review the following and answer any questions:

- Employee's comfort level working on the teller line, establish support network
- Fields of membership and SEG's specific to their branch
- Teller commands and cash handling, if applicable
- Check holds: Their limits and other's limits
- Cross-selling and it's importance
- Gold Medal Service expectations and it's importance
- Who does what (Travelers Cheques, IPS, ATM cards, etc.)
- Cash and vault procedures, if applicable
- All clear signal, robbery procedures and location of alarms
- Review employee's job description
- Time clock procedures
- Employee's schedule (lunches should be the same as Mentor for 2 weeks)
- Give the employee a tour of the branch and introduce them to the rest of the team Providing a brief description of each person's existing responsibilities.
- Issue keys and combinations and count the cash drawer with the New Employee, if applicable.

As the day/week progresses, introduce the New Employee to members known to your branch.

Please initial after the information above is reviewed.

Manager: _____ New Employee: _____

Mentor: _____

New Employee Supply List

Please supply the following items for each employee's workstation.

Branch Employee:

- 1) New Employee Handbook
- 2) Pens/ pencils/ paperclips/ rubber bands/ highlighters
- 3) SEG book access
- 4) Stapler
- 5) Tape dispenser
- 6) Calendar
- 7) Calculator
- 8) Teller stamp
- 9) Transaction holder
- 10) floridacentral address stamp
- 11) Payroll deduction stamp
- 12) Counterfeit money pen
- 13) Pay To The Order stamp
- 14) Employee name list/ Phone extension list
- 15) Not Used For Purpose Intended stamp
- 16) Commonly used phone numbers: ex. Cheksystems, MasterCard, Deluxe, etc.

Member Services Employee:

- 1) Same as above
- 2) Branch maps- branch directions
- 3) Binder with Member Service procedures

Back-office Employee:

- 1) New Employee Handbook
- 2) Pens/ pencils/ paperclips/ rubber bands/ highlighters
- 3) Stapler
- 4) Calendar
- 5) Calculator
- 6) Tape dispenser
- 7) Teller stamp, if applicable
- 8) Transaction receipt holder, if applicable
- 9) Employee name list/ Phone extension list
- 10) Commonly used phone numbers: ex. Chexsystems, MasterCard, Deluxe, etc.

For additional information, please feel free to contact the Training Team.

Who Does What at the Branch

Please list all the employees responsible for the following at your branch.

Who should the new employee refer a member to if they are interested in...

Opening a new account (RSA, SDA, CD, MMA) _____

Opening a new IRA _____

Applying for a loan _____

Applying for a Home Equity Loan/Line _____

Applying for a Mortgage _____

Or if the member needs...

To Change their pin on an ATM/Debit Card _____

A new ATM card _____

A new Debit card _____

To do a wire transfer _____

To do a stop payment _____

To do a Debit/ATM card dispute _____

Fees refunded _____

To add/remove a joint owner from their account _____

Needs to do an Account # change _____

To order checks _____

To close an account _____

An Authorized Signature on an Official Check _____

Branch Scavenger Hunt

Please take a few moments to find where the following items are kept in your office. Make note of the location in the space provided.

Brochures on display _____

Extra brochures _____

Envelopes (mailing) _____

Money envelopes _____

Yellow Teller/Vault Exchange slips _____

Coin wrappers and money straps _____

Staples _____

Paper clips _____

Pens _____

Scratch Paper/Memo Pads _____

Membership Applications _____

Loan Applications _____

IRA forms _____

Promotional materials for floridacentral Financial Services (business cards, flyers, etc.) _____

Promotional materials for the Auto Advisor (business cards, flyers, etc.) _____

Deposit slips on display _____

Extra deposit slips _____

Receipt paper _____

Printer cartridges _____

Calculator tape _____

Stop payment forms _____

Wire transfer forms _____

Dispute forms _____

Branch logs _____

Money Orders _____

New Employee/Mentor Checklist

Employee Name: _____

Team: _____

Employee Initials	Mentor Initials	Topics
		Providing Gold Medal Service to every member and Service Standards
		Branch Opening/Closing Procedures
		Field of Membership
		Floridacentral Products and Services
		Payroll Deduction and Direct Deposit
		Cash and BSA Procedures: Cash limit/transfers, Counterfeit Pen, Audits, CTR, Chexsystems, CIP Policy, Over/Short Consequences
		Overdraft Privilege: ACC Codes, Limits, Discretionary, etc.
		Robbery Procedures/ Dual Control/ Security Procedures
		Accounts and Suffixes: RSA 00, SDA 05, 2SA 11, CCA 04, etc.
		Check Hold Policy/ Check Limits/ Authorization Limits
		Collection and Restrictive Flag Accounts
		Credit Card Payments, Loan Payment Method Codes, Loans Paid in Full Form
		SHD: Stop Payments, Check Copies, Statement Copies, Joint Release/ Account Change, Clearing Differences, Address Changes
		Fees: Common Teller Fees and F&T Codes
		Money Orders, Official Checks, Travelers Cheques, and Cash Advances

The above referenced information has been reviewed and initialed by the Mentor and New Employee.

New Employee Signature: _____

Date: _____

Mentor Signature: _____

Manager Signature: _____

NEW EMPLOYEE TRAINING EVALUATION

Name: _____

Team: _____

Manager/Mentor: _____

Dates Mentored: _____

Professional Skills	Exceeds Expectations	Meets Expectations	Needs Improvement
Punctuality			
Participation			
Keeps pace			
Able to navigate through the systems			
Follows instructions			

Subject Comprehension	Exceeds Expectations	Meets Expectations	Needs Improvement
Product Knowledge			
Security and Compliance			
Forms and Brochures			
Information Resources			
Regulations			

Systems Proficiency	Exceeds Expectations	Meets Expectations	Needs Improvement
Email, Internet, Intranet, and Company Folder			
Account Services –navigation and understanding			
Account Services –teller transactions			
COWWW-navigation and understanding			

NEW EMPLOYEE TRAINING EVALUATION (cont.)

Comments:

New Employee's Comments:

Employee Signature: _____

Date: _____

Manager/Mentor Signature: _____

Date: _____

Mentor Payroll Form

Mentor: _____

New Employee: _____

Dates Mentored

Week #1

From: _____

To: _____

Week #2

From: _____

To: _____

Manager's Signature: _____

Mentor's Signature: _____

**Mentor will be paid a total of \$40.00 for the two-week period.