

Bank Savings Officer

You are responsible for opening savings accounts for *JA BizTown* citizens. It is important that you work carefully and keep accurate records for yourself and for your customers.

1. Get iPad From the Cart



Your job requires you to use an iPad today. Go to the iPad cart to pick up **iPad #5**. A teacher will be at the cart if you need assistance. Log into your iPad, **following the login directions on the last page of your manual**.

2. Collect Direct Deposit Enrollment Forms

After the Pledge of Allegiance, during the business start-up time, go around to each business and collect the **Direct Deposit Enrollment** forms from the CEOs. Give them to the volunteer in your shop. These are for the tellers to check later in the day. If you do not finish collecting them during the business start-up time, you can finish during the shopping breaks later in the day if the rest of your job is completed.

3. iPad Training as a Savings Officer



A JA staff person will explain your job instructions to you and how to use your iPad.

4. Accept Customer Checks

As you open each customer's account during the first set of work/break rotations, do the following:

- a. Accept each customer's personal check and place it in the gray box provided. Be sure that the check has been written to the Bank in the amount of \$1.50 and is signed by the citizen at the bottom of the check.
- b. Be sure to thank each customer as he/she leaves.

5. Transfer Funds



Once all citizens have left the bank and are eating lunch, do the following on your iPad:

- a. On the left column of your device tap **Personal Banking**.
- b. Put in the account number of the student, tap the **Submit** button.
- c. Verify the student's name and tap **Yes** if it is correct.
- d. Tap **Transfer Funds** at the bottom of the page.
- e. Tap **Checking to Savings**.
- f. Enter **\$1.50** in the amount field.
- g. Tap **Done**.

- h. Tap **Yes**. You will see **Fund Transfer Successful**.
- i. To go on to the next student, tap **Exit Transaction** at the top right of your page.
- j. Keep the deposit tickets at your desk for the time being.
- k. Ask Tellers for assistance if needed.

6. Train CFO



The CFO will fill in for you when you are on break. Train the CFO during the yellow break.

7. Stamping of the Savings Checks

If you have finished entering all students in step 3, during the second set of break rotations, stamp the back of each check with the “**Opened Savings Account**” stamp. Set these aside.

8. Direct Deposit Enrollment Forms

During the shopping breaks you will be asked to help check the **Direct Deposit Enrollment** forms to ensure each citizen has gotten paid twice. A staff person will instruct you on how to do this.

9. Clean Up

Assist with business clean up at the end of the day.