Dear CU PolicyPro Client,

Spring is in full swing and summer is on its way! That means we are also gearing up for the next CU PolicyPro quarterly update which will be released in late June! Before the next update sneaks up on you, it's a good time to review your policies and use the tools in CU PolicyPro to help ensure you're up to date on any changes. This month's OPS Notes topic has some tips to get you started.

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Monthly OPS Notes Release: Policy Management Tips

The quarterly updates can seem overwhelming, but there are some tools in CU PolicyPro to help you determine which policies need review and which policies are up to date.

If you're using the model policy content from CU PolicyPro as a basis for your policies, over time your policies may become out of date if:

1. The model policy content in the Master Manual has been updated but those updates have not yet been applied to your custom policy, or
2. If the operations in your credit union have changed and your policy has not been updated to reflect these changes.

Because only the credit union can determine if its operations have changed, this article will address scenario #1 above and discuss best practices for determining whether or not the custom policy contains the most current model content policy updates.

If you're editing and managing your policies using CU Policy Pro's Working Manual and policy editing tools, one tool you can use for this determination is to review the **Working Manual Report**. This report is found in the MANUAL BUILDER area, under the Working Manual in the Reports folder. The Working Manual Report is a snapshot of the activity in the Working Manual and dates are used to provide an overview of what has occurred with each policy. Please note that the Working Manual Report should be used only to evaluate policies that use the model policy content as their basis.

Our support site has more information and step by step guidance on using the Working Manual report to review your policies to see if they may be out of date.

Two additional tools that are helpful for both clients editing within CU PolicyPro or editing outside of the system in Word are the "Last Reviewed-Revised Listing" and the "Policy Update History" reports, both found in the CU PolicyPro Library under CU PolicyPro Tools > General.

The "Last Reviewed-Revised Listing" report lists all of the model policies found in CU PolicyPro and shows dates for the last time each was reviewed and revised. Often times these dates are the same as each other, but some policies are reviewed and no revisions are required. When was the last time you updated your policies? Compare that date to the "Last Revised" date on this report, and if the model content has been updated since you last updated your policy, it's time to review the updates and see if your policy needs any changes.

Use the "Policy Update History" report to see a brief overview of the last several updates to any given policy. Use this reference as a guide to review the specific redlined versions in the CU PolicyPro Updates folder in the Library and incorporate any relevant changes into your own policy.

For more information on how to read the redlined versions and how incorporate the updates into your own policies,
visit our Support Site.

Content FAQs

Question: Why are there some policies that are not in the manual, such as Foreclosures or HR Policies?

Answer: The CU PolicyPro Manual is written from a federal perspective, so certain topics that fall under state law are not part of the manual. Because the laws between states vary so widely, it would be very difficult to write a model policy that would be meaningful.

We recommend checking with your state league on state specific topics.

Also, the CU PolicyPro Manual covers only Operational topics. Certain areas such as Human Resources or Board Governance are important and may be touched on within the operations manual, but we are not generally writing policies that cover these areas.

There may be other policies that your credit union needs that are not found in the manual. Please feel free to request these policies to be added. While we cannot guarantee to write a policy on any given topic, we do review all requests and fulfill as many as we can. We do receive many requests for topics that are procedural in nature and wouldn't fall under a policy, and unfortunately we can't provide procedures. However, feel free to send in your requests as it does not hurt to ask!

Technical FAQs

Question: I have created subfolders in the Storage Area to the Employee Resources folder, but the files I uploaded to those folders are not visible on the home page. Is there a step I may have missed?

Answer: Unfortunately sub-foldering in the Storage area does not extend to the home page. While you can add sub folders to the Manager Resources and Employee Resources folders in the storage area itself, only those files in the root of those two folders will be shown on the home page of CU PolicyPro. You will need to move your files out of the subfolders into the root folder of Manager Resources or Employee Resources in order to see them. You can do this easily by clicking on the "move" icon for each of the files and moving them directly into Manager Resources or Employee Resources.

If you have additional questions, please contact the support team at policysupport@cusolutionsgroup.com.

Questions?

If this information was forwarded to you, and you'd like to be on the distribution list to receive information and updates related to CU PolicyPro, or if you have any questions regarding the CU PolicyPro content, or questions on how to use the system, please contact policysupport@cusolutionsgroup.com.

Thanks and have a great weekend!