August 2016

Dear CU PolicyPro Client,

Summer is drawing to a close and school is back in session. But don't be sad – there's plenty to look forward to with the new CU PolicyPro Enhancements coming next week! This long-awaited system upgrade includes a brand new look and is packed with new features and functionality. There are more details below, as well as information on system availability as we bring the new system online.

In this edition:

- CU PolicyPro Enhancements – Coming Next Week!
- Content FAQ
- Technical FAQ
- Questions?

CU PolicyPro Enhancements – Coming Next Week!

We are very excited to bring some new enhancements to CU PolicyPro! The new system will be available on Tuesday, September 6.

Please note that CU PolicyPro will be unavailable on Sunday, September 4 and Monday, September 5, so enjoy the long weekend and check out the new system after the Holiday! We will send out a launch announcement early next week along with a link to an Overview and Tutorial video to walk you through the changes and new features.

Here's a sneak peek at what to expect:

Look and Feel Changes and Updates to Terminology

- The site has been redesigned with a clean, updated, more modern look and feel

- Navigation is now across the top consistently throughout the entire site, with a prominent link to Help/Support

- Many areas of the site have been renamed for consistency and to help make navigating and finding policies and resources much easier

New Access Level

- In the Administration area, a new custom access level can be created to allow for Read Only Access to the policies area

New Functionality

- New *Manage Date Settings* utility allows for date fields to be updated across multiple policies at one time

- Track Changes option allows users to "redline" policy changes which can be accepted or rejected all at once or on a per-change basis

- Footnotes can be added to policies

- When adding Model Policies, users will be notified if the policy number already exists in the CU Policies manual and will have several options to handle the duplicate policy

- New text tools include the ability to change text to all upper case, all lower case, or title case

- Policies can now be deleted individually at the policy level

- When Publishing, users can now decide if they want the published date to appear on the title page or not

- A PDF option is now available for Published Manuals (manuals published prior to the update will not have the PDF option)

- Users can now set default publishing font styles sizes for published manuals for the policy header and policy text

Content FAQs

Question: There are a lot of upcoming regulatory changes. When can we expect the policies in CU PolicyPro to be updated?

Answer: The CU PolicyPro policies are updated once per quarter. The exact release date may vary from quarter to quarter or from year to year, but typically the updates are released near the end of the quarter. We expect the next update to be released on or about September 30, 2016.

When a new law or regulation is issued, the CU PolicyPro staff will make every effort to update the associated policy(ies) in CU PolicyPro in the next scheduled quarterly update. However, sometimes it will be in the following quarterly update. We cannot write or amend a policy prior to the law/regulation being issued, and it does take some time to go through the new requirements and determine how credit unions will be affected and what they will need to do.

Some factors that can affect the timing of an updated policy include: how close to the quarterly update the final law/regulation is issued, how long or complex is the new law/regulation, the number of other updates being processed for the update, and how much time the credit union has between the final ruling and the required implementation date.

Technical FAQs

Question: How will the new CU PolicyPro enhancements affect my CU PolicyPro manual? What do I need to do?

Answer: The new look and feel and all of the new features will be automatically applied to every CU PolicyPro implementation. The changes will not affect your content, any posted documents or any published manuals in any way. Because we have renamed some of the areas of the site and added new features, we strongly recommend watching the Overview and Tutorial Video to make the transition smooth and to make sure you are aware of all of the great new functionality available. A link to that video will be released next week once the new site goes live.

If you have any questions or need more information, please don't hesitate to contact our support staff 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!