



**Overview of Changes:
New vs. Old System**

Overview of CU PolicyPro Changes: New vs. Old System

Welcome to the new CU PolicyPro!

To help make the transition to the new platform as easy as possible, we have created this document which compares the location and function of popular features found in the new and old CU PolicyPro systems.

Notes:

- The old system images and descriptions are always on the left side of the screen; new on the right.
- All screenshots are showing Admin-level user access. If you have a different level of access, you may not see all of the features and tools shown.
- This document is not meant as an instruction manual for how to use the features and functions highlighted. For detailed instructions, please refer to the Quick Guides in the Support area of CU PolicyPro.
- Look for this symbol  next to descriptions of features that are new or enhanced in the new CU PolicyPro system.

Home Page and Navigation

- Site navigation on the top of the screen
- News and announcements displayed on the left side of the screen

CU PolicyPro > Home
123 Training CU

Logged in as [User]
Access Level: admin
Change Password Logout

Policies Resources CU Documents Administration Training/Support Home

Sunday, April 25, 2021

Important CU PolicyPro News!

We are excited to announce that CU PolicyPro is currently undergoing a complete rebuild that will be rolled out in April 2021! The new system will continue to provide the great model policy content you've come to expect, but will now offer a fully redesigned policy management system!

Click here for more information on the system's new features!

We will be contacting all clients with information on what come next in the coming weeks!

February 26, 2021 Content Update 2020.5

The latest content update has been released and includes **1 new policy and 11 policy updates.**

For additional information about this update, including instructions on what your credit union needs to do next, click here.

User Questions?
Contact the CU PolicyPro Support Staff at policy.support@cusolutionsgroup.com. Support is available M-F from 9am - 5pm (Eastern).

CU PolicyPro is, by far, the most wonderful piece of technology, I have ever used. ~Christopher Walken

Published Policies - Manager Access:

- [Policies for Board Review April 2018 \(PDF Version\)](#) (Date Published: 04/12/2018)

CU Documents - Manager Access:

- [Appendix to Policy 1542 - Loan Rates.xlsx](#)
- [Loan Limit Chart.csv](#)
- [New Employee Signature Form.docx](#)
- [Update Overview for Board - December 2016.docx](#)

Published Policies - Employee Access:

No policies have been posted.

CU Documents - Employee Access:

- [Policies to Review.docx](#)
- [Policy 10004 - Table 4 - Electronic Funds Transfer Records - REOLINED.docx](#)

- Site navigation on the left side of the screen
- News and announcements displayed more prominently on the right side of the screen
- Text defining model policies and CU policies to highlight the differences between the 2 manuals
- Quick access to view model policies and published manuals and to edit CU policies
- List of current assignments for the user
- Additional navigation options are available in the Administration area



- Home
- Resources
- Support
- Administration
- Policies
- CU Policies
- Model Policies
- Archived Policies
- Publishing
- Key Fields
- Files
- Modules
- Users
- Settings
- Reports
- Log Out

CU PolicyPro ABC Credit Union

Logged in as [User] Access Level: ADMIN Change Password

Home Resources Support Administration Log Out

Model Policies

CU Policies

Latest News

Welcome to the new CU PolicyPro!

We are very excited about the launch of the new CU PolicyPro! We hope you find the new system easy to use and that the new features will make customizing and managing your policies easier than ever! If you have any questions, please contact our support team at policy.support@cusolutionsgroup.com.

Assignments

- 1 Pending 1 Overdue

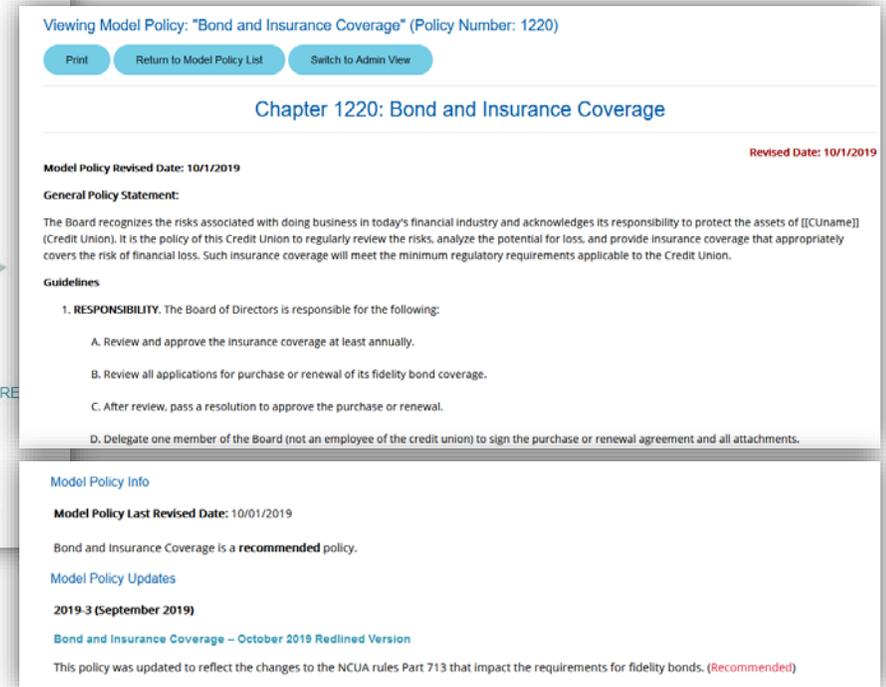
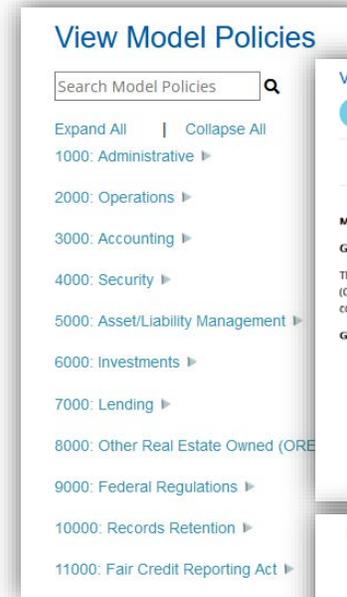
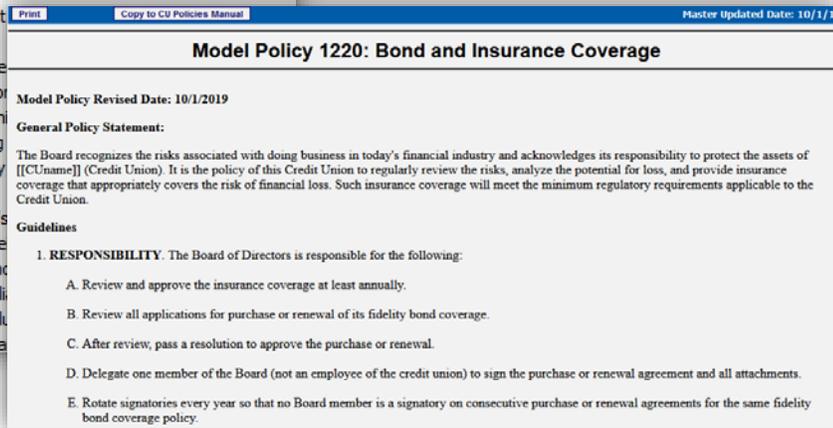
Date Due	Assignment Name	Assignment Type	Status	Mark Complete
4/20/2021	Review Accounting Chapter	Policy Review	Overdue	Complete
5/31/2021	Review Lending Chapter	Policy Review	Pending	Complete

Accessing Model Policies

- Users must have access to the entire “Policies” area to view model policies
- One long listing of model policies
- Users can search only the policy text

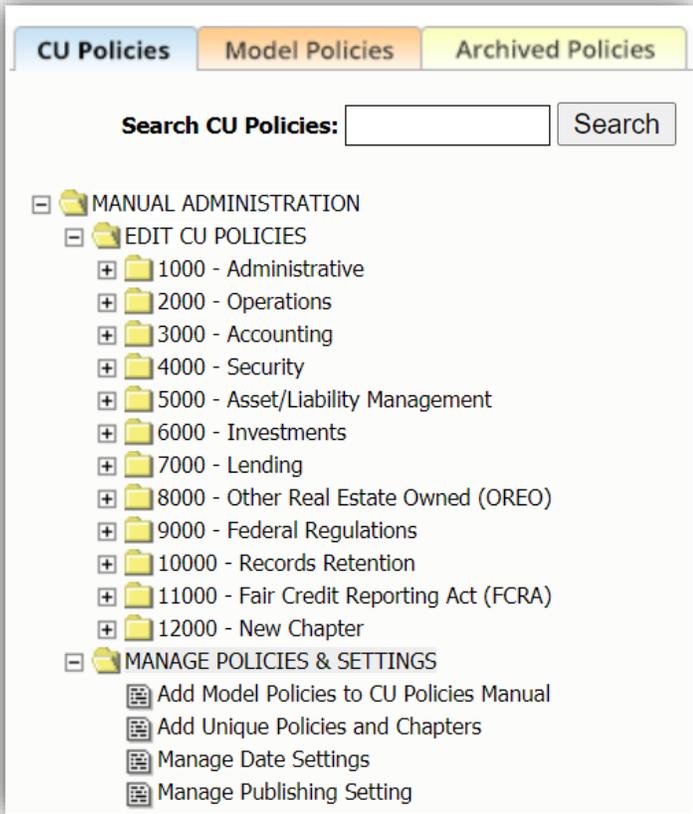


- Model policies are available to all users from the Home page
- Model policy listing is collapsible by chapter
- Users can search both policy number and policy text
- Quick access to switch to “Admin View” to add model policies to the CU Policies manual
- Additional information about each model policy, including whether it is recommended/required/etc., helpful links/forms, and redlined versions of the policy from each update.



Accessing CU Policies

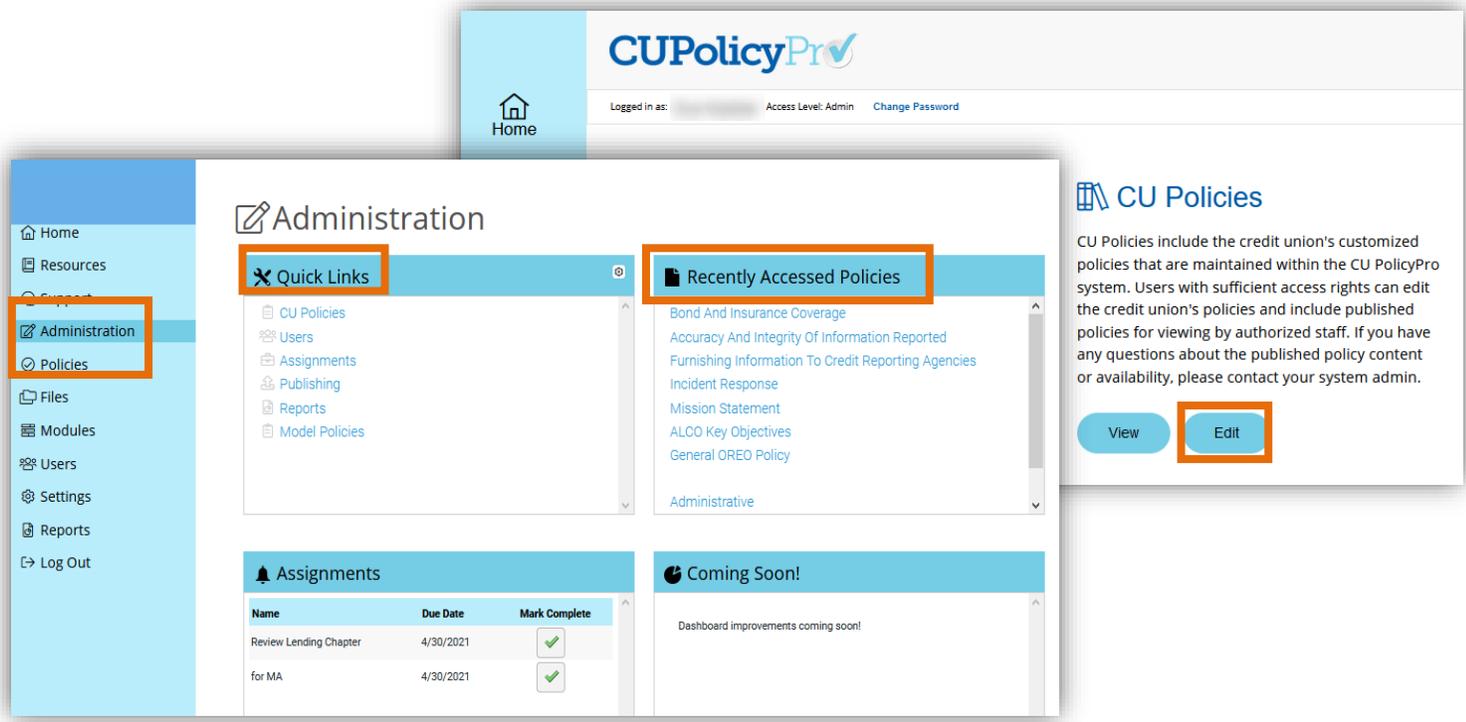
- CU polices are accessed in the Policies area
- CU Policies can be accessed through the Administration link on the left navigation menu or from the Edit button on the Home page
-  Dashboard allows users to create quick links to the various areas under Administration and easily pick up where they left off previously with the last ten policies accessed



CU Policies | Model Policies | Archived Policies

Search CU Policies: Search

- MANUAL ADMINISTRATION
 - EDIT CU POLICIES
 - 1000 - Administrative
 - 2000 - Operations
 - 3000 - Accounting
 - 4000 - Security
 - 5000 - Asset/Liability Management
 - 6000 - Investments
 - 7000 - Lending
 - 8000 - Other Real Estate Owned (OREO)
 - 9000 - Federal Regulations
 - 10000 - Records Retention
 - 11000 - Fair Credit Reporting Act (FCRA)
 - 12000 - New Chapter
 - MANAGE POLICIES & SETTINGS
 - Add Model Policies to CU Policies Manual
 - Add Unique Policies and Chapters
 - Manage Date Settings
 - Manage Publishing Setting



CUPolicyPro

Home | Logged in as: [User] | Access Level: Admin | Change Password

Administration

- Quick Links
 - CU Policies
 - Users
 - Assignments
 - Publishing
 - Reports
 - Model Policies
- Recently Accessed Policies
 - Bond And Insurance Coverage
 - Accuracy And Integrity Of Information Reported
 - Furnishing Information To Credit Reporting Agencies
 - Incident Response
 - Mission Statement
 - ALCO Key Objectives
 - General OREO Policy
 - Administrative

CU Policies

CU Policies include the credit union's customized policies that are maintained within the CU PolicyPro system. Users with sufficient access rights can edit the credit union's policies and include published policies for viewing by authorized staff. If you have any questions about the published policy content or availability, please contact your system admin.

View | Edit

Name	Due Date	Mark Complete
Review Lending Chapter for MA	4/30/2021	✓
	4/30/2021	✓

Coming Soon!

Dashboard improvements coming soon!

Editing CU Policies

- Date policy was added to manual is found below policy content
- Policy number alone associated the model policies to the CU Policies. Changing a policy number disrupted this association.
- Users can be assigned rights to view all policies or to edit all policies



- Date policy was added to manual is above policy content
- Associated model policy allows users to change the name and/or number of the CU policy while maintaining association with the original model policy, or to add model policy association to a unique policy
- Viewing and/or editing rights for CU policies can be assigned down the policy level
- Shows who made the last update to the policy and when
- Activity Log allows users to view the history of activity on each policy and view/restore previous policy versions

Policy Name: Bond and Insurance Coverage | Policy Number: 1220 | Publishing: Include

Revised Date: [X] | Reviewed Date: [X] | Board Approved Date: [X]

Model Policy Revised Date: 10/1/2019

General Policy Statement:

The Board recognizes the risks associated with doing business in today's financial industry and acknowledges its responsibility to protect the assets of [[CUname]] (Credit Union). It is the policy of this Credit Union to regularly review the risks, analyze the potential for loss, and provide insurance coverage that appropriately covers the risk of financial loss. Such insurance coverage will meet the minimum regulatory requirements applicable to the Credit Union.

Guidelines

Added to CU Policies from Model Policies: 04/26/21
Model Policy Last Revised: 10/01/19

Policies > Administrative > Bond and Insurance Coverage

General Policy Information

Policy Name: Bond and Insurance Coverage | Policy Number: 1220

Associated Model Policy: Bond and Insurance Coverage (1220)

Revised Date: [] | Reviewed Date: 04/30/2021 | Board Approved Date: []

Last Updated By: []

Action: Policy Imported
Date: 3-24-2021 10:12:07 AM

Policy Added to Manual: 3-24-2021
[View Log](#)

Revision Log For: "Bond and Insurance Coverage"

Revision Number	User	Date	Action
2	[]	4/25/2021 12:56 pm	Policy Saved
1	[]	3/24/2021 10:12 am	Policy Imported

Legend

- Preview
- Restore

Additional Information in CU Policies

- Editor Notes can be deleted
- Key Fields can be viewed, defined, and edited in a pop-up box
- Auditor Notes can be deleted and edited
- Key Fields can be viewed, defined, and edited directly on the screen
- Includes information about associated model policy, including whether it is recommended/required/etc., helpful links/forms, and redlined versions of the policy from each update
- Users can subscribe to receive email notifications each time the CU policy is saved



Added to CU Policies from Model Policies: 04/25/21
Model Policy Last Revised: 10/01/19

Editor Note:

Key Fields

Key Field	Contents	Description
[[CUName]]	The Credit Union	The name of your credit union

Notes

Date	Note By	Note	
04/25/21 13:03		Added additional information on bond coverage	Delete Note

Model Policy Info ▾

Model Policy Last Revised Date: 10/01/2019

Bond and Insurance Coverage is a **recommended** policy.

Model Policy Updates ▾

2019-3 (September 2019)

Bond and Insurance Coverage - October 2019 Redlined Version

This policy was updated to reflect the changes to the NCUA rules Part 713 that impact the requirements for fidelity bonds. (Recommended)

Auditing Notes ▾

Add Note:

Note	User	Date	
Added additional information on bond coverage		4/25/2021 1:03 pm	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

[Expand All Notes](#)

Notifications ▾

Notifications:

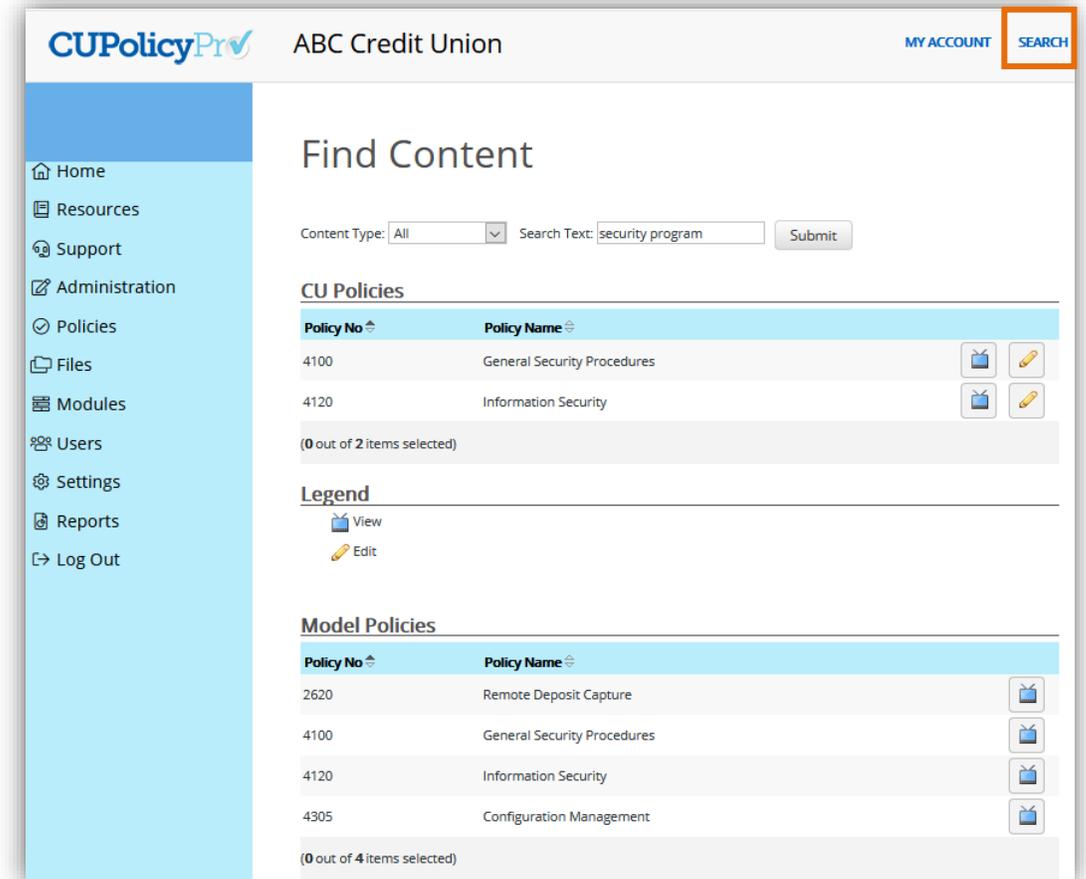
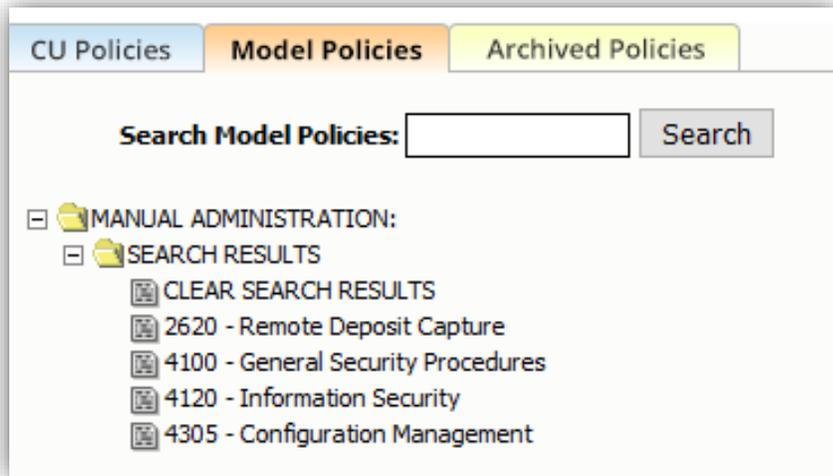
Key Field Information ▾

Keyword	Value	Description
CUName	ABC Credit Union	The name of your credit union

Searching Policies

- Each manual must be searched separately
- Users can search the policy text

- The Search option in the Administration area allows users to search both model policies and CU policies at once
- The Search option on the Home page allows users to search model policies only (restricting access to view CU policies)
- Users can search the policy number and the text



Adding Model Policies to the CU Policies Manual

- Users can add a single policy when viewing individual model policies
- Users can add multiple policies at once in the CU Policies settings
- Users can add a single policy when viewing individual model policies
- Users can add multiple policies at once under the “Import Model Policies” tab

CU Policies | Model Policies | Archived Policies

Search CU Policies: Search

Add Model Policies to CU Policies

Check the policies below and click the "SAVE" button.

Select/Deselect All

1000: Administrative
 1100: Leadership

Print | Copy to CU Policies Manual | Master Updated Date: 6/27/14

Model Policy 1200: Organization

Model Policy Revised Date: 06/27/2014

General Policy Statement:
[[CUName]] (Credit Union) is managed by a Board of Directors assisted by committees as set forth in the Credit Union's bylaws.

Guidelines:

1. **BOARD OF DIRECTORS.**
 - A. The Board of Directors consists of an odd number of directors, at least five in number, who are elected by the Credit Union members.
 - B. The Board is ultimately responsible for all the operations of the Credit Union.

CU Policies | Manage CU Policies | Import Model Policies

Import Model Policy

Select one or more model policies to import to your CU Policies manual, then click the SAVE button at the bottom of the policy listing.

Administrative (1000) [Select Sub-Policies] [Deselect Sub-Policies]

Leadership (1100)
 Mission Statement (1110)
 Visi
 Cre
 Cre
 Fie
 Str
 Eq
 Org
 Bo
 Co

Return to Full Policy Listing

Print | Import Policy

Viewing Model Policy: "Fixed Assets" (Policy Number: 3130)

Manage Model Policies | Import Model Policies

Policy 3130: Fixed Assets

Model Policy Revised Date: 07/01/2009 **Revised Date: 7/1/2009**

General Policy Statement:
[[CUName]] (Credit Union) will properly account for fixed assets.

Guidelines:

1. **HISTORICAL COST.** All fixed assets shall be recorded at cost. Cost includes all expenditures required to place the asset in service, including but not limited to the purchase price, shipping charges, insurance, sales tax, and installation charges.

Adding Unique Policies to the CU Policies Manual

- New policies and chapters are added in the “Add Unique Policies and Chapters” utility.
- Policy number required upon creation of policy
- Policy placement is determined by the policy number



- New policies and chapters are added using the link at the end of the respective listing
- Policy or chapter number can be added when editing
- Number does not have to determine the order or placement of a policy or chapter
- Unique policies can be associated with a corresponding model policy to link additional model policy information to the unique policy

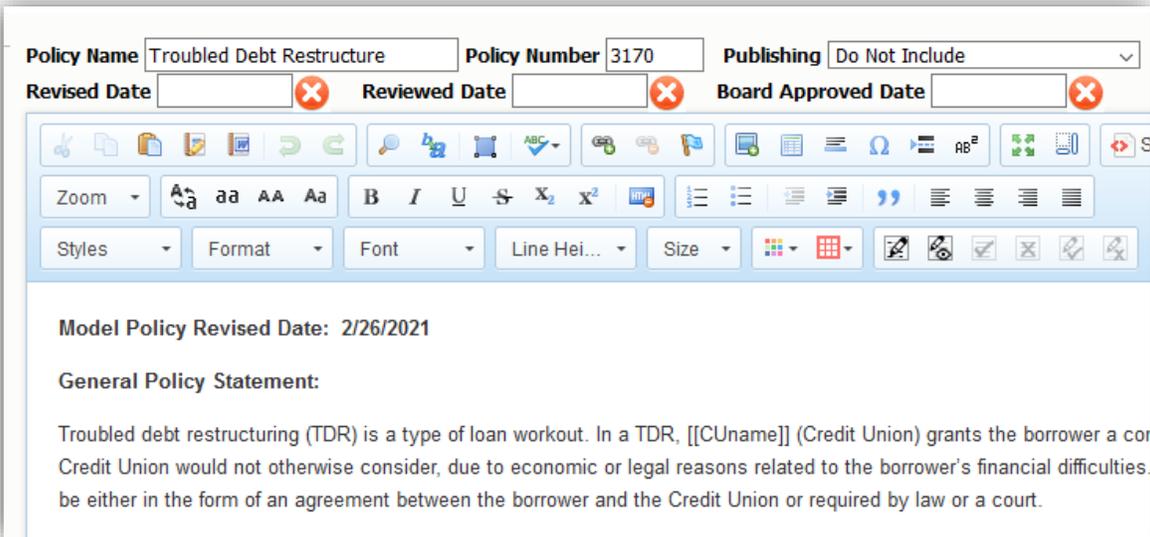
The screenshot shows the 'CU Policies' administration interface. On the left is a navigation menu with categories like 'MANUAL ADMINISTRATION', 'EDIT CU POLICIES', 'MANAGE POLICIES & SETTINGS', 'PUBLISHING TOOLS', and 'REPORTS'. The 'MANAGE POLICIES & SETTINGS' section is expanded, showing options such as 'Add Model Policies to CU Policies Manual', 'Add Unique Policies and Chapters', 'Manage Date Settings', 'Manage Publishing Setting', 'Archive Policies', 'Manage Key Fields', and 'Delete Policies'. The main content area is titled 'Add Unique Policies and Chapters to CU Policies Manual' and contains a search bar for 'CU Policies', a 'Save' button, and a link to 'Add Multiple Policies'. Below the title, there is a brief instruction: 'Enter information in the fields below to create a new blank policy in your CU Policies Manual. For a new chapter, use a number divisible by 1000 (12000, 13000, etc)'. There are two input fields: 'Policy Number' and 'Policy Name'.

This screenshot shows a list of policies. The first item is 'Affiliate Marketing Rules (11016)' with a right-pointing arrow. Below it are two green circular icons with a plus sign, each followed by a blue text link: 'Add New Policy to "Fair Credit Reporting Act"' and 'Add Chapter'.

The screenshot shows the 'Editing Policy: "Test Policy Uno" (Policy Number: 0)' form. The breadcrumb trail is 'Policies > Test Chapter > Test Policy Uno'. The 'General Policy Information' section contains several fields: 'Policy Name' (Test Policy Uno), 'Policy Number' (0), and 'Associated Model Policy' (Unlinked (No Model Policy Association)). The 'Associated Model Policy' field is highlighted with a red box.

Moving CU Policies

- CU policies can only be moved between chapters by changing the policy number, which can break the association with the original model policy
- CU policies can be moved between chapters in the “Move Policies” tab
- Moving a policy does not require a change to the policy number (although the number can be changed when editing, if desired, and the system will maintain the association with the original model policy)



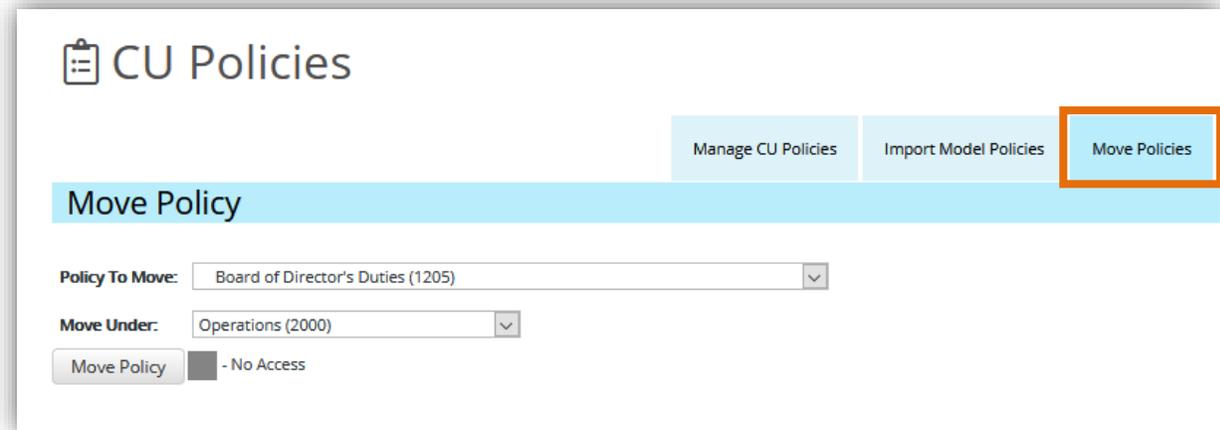
Policy Name Policy Number Publishing

Revised Date Reviewed Date Board Approved Date

Model Policy Revised Date: 2/26/2021

General Policy Statement:

Troubled debt restructuring (TDR) is a type of loan workout. In a TDR, [[CUname]] (Credit Union) grants the borrower a cor
Credit Union would not otherwise consider, due to economic or legal reasons related to the borrower's financial difficulties.
be either in the form of an agreement between the borrower and the Credit Union or required by law or a court.



CU Policies

Manage CU Policies Import Model Policies **Move Policies**

Move Policy

Policy To Move:

Move Under:

Move Policy - No Access

Reordering CU Policies

- CU policies can only be reordered by changing the policy number, which can break the association with the original model policy

- CU policies and chapters can be reordered in the “Reorder Policies” tab
- Policies and chapters can be ordered numerically, alphabetically, or in a specific order chosen by the user

Policy Name Troubled Debt Restructure **Policy Number** 3170 **Publishing** Do Not Include

Revised Date [X] **Reviewed Date** [X] **Board Approved Date** [X]

Model Policy Revised Date: 2/26/2021

General Policy Statement:

Troubled debt restructuring (TDR) is a type of loan workout. In a TDR, [[CUname]] (Credit Union) grants the borrower a cor
Credit Union would not otherwise consider, due to economic or legal reasons related to the borrower's financial difficulties.
be either in the form of an agreement between the borrower and the Credit Union or required by law or a court.

Manage CU Policies Import Model Policies Move Policies **Reorder Policies** Manage Policy Dates

Reorder Policies

To reorder to policies in a particular chapter, click on the chapter title below, or select "Reorder Chapters" to change the order of the chapters.

Reorder Chapters

- Administrative
 - Mission Statement
 - Vision Statement
 - Credit Union Values

Reorder Policies

Drag and drop pages to reorder. You can also choose to alphabetize the list. Click

- ↑ General Investment Policy (6100)
- ↑ ASC 320 Compliance (6105)
- ↑ Broker-Dealer Relations (6110)
- ↑ Concentration Risk (6115)
- ↑ Investment Accounting (6120)
- ↑ Non-Deposit Investment Products (6220)
- ↑ Derivative Investments (6215)
- ↑ Charitable Donation Accounts (6300)

Alphabetize Sort by Policy Number

Save Cancel

Archived Policies and Restoring Active and Deleted Policies

- Users must choose to archive a policy in order to store it in the Archive
- Archived policies can be viewed and restored
- Users must contact support to restore a deleted policy or get information on who deleted a policy

- Policy revisions are captured automatically in the Archive
- Archived policies can be viewed and restored
- Users can restore deleted policies and view who deleted the policy and when

The screenshot shows the 'Archived Policies' section of a web application. At the top, there are tabs for 'CU Policies', 'Model Policies', and 'Archived Policies'. Below the tabs, there are options to 'Sort Archived Items By: Name | Number | Date' and a search bar labeled 'Search Archive:'. A list of archived policies is shown on the left, including '2113: Bank Secrecy Act: Not Servicing Marijuana-Related Accounts (April 24, 2021)', '2112: Bank Secrecy Act: Servicing Marijuana-Related Accounts (April 24, 2021)', '2100: General Operations Policies (April 24, 2021)', '1150: Field of Membership (April 24, 2021)', '1205: Board of Director's Duties (January 22, 2021)', '1400: Legal Counsel (June 24, 2020)', '1205: Board of Director's Duties (August 13, 2019)', and '1210: Compensation, Reimbursement And Indemnification (August 13, 2019)'. The main content area displays 'Archive Policy 2100: General Operations Policies' with a 'Delete Archived Policy' and 'Restore to CU Policies Manual' button. The 'Archive Date: April 24, 2021' is shown. Below this, the 'Model Policy Revised Date: 09/30/2014' and 'General Policy Statement:' are displayed. The policy statement reads: 'The Board of Directors delegates responsibility to management for developing sound procedures for compliance with the various laws and regulations that govern credit union operations including, but not limited to, the Bank Secrecy Act, the Right to Financial Privacy Act, the Gramm-Leach-Bliley Act, the Children's Online Privacy Act, the Customer Identification Program and the USA PATRIOT Act as well as for the control of cash, dual control, purchasing, signing authority, and other general operations policies.' At the bottom, it says 'This would be the custom version of this policy'.

The screenshot shows the 'Archived Policies' section of a web application. At the top, there are tabs for 'CU Policies', 'Model Policies', and 'Archived Policies'. Below the tabs, there are options to 'Delete Archived Policy' and 'Restore to CU Policies Manual'. The 'Archive Date: April 24, 2021' is shown. Below this, the 'Archive Policy 2100: General Operations Policies' is displayed. The 'Model Policy Revised Date: 09/30/2014' and 'General Policy Statement:' are displayed. The policy statement reads: 'The Board of Directors delegates responsibility to management for developing sound procedures for compliance with the various laws and regulations that govern credit union operations including, but not limited to, the Bank Secrecy Act, the Right to Financial Privacy Act, the Gramm-Leach-Bliley Act, the Children's Online Privacy Act, the Customer Identification Program and the USA PATRIOT Act as well as for the control of cash, dual control, purchasing, signing authority, and other general operations policies.' At the bottom, it says 'This would be the custom version of this policy'.

Archived Policies

Restore Active Policies Restore Deleted Policies

Restore Active Policies

Select a revision date and time from the drop-down then preview click the "Preview" button to view it. If it is the revision you want, click **Restore Revision** button. The **Edit** button will return you to the current version of the policy in the CU Policies manual.

Legend

- Preview
- Restore
- Edit Content

Name	Policy Number	Revision			
Administrative	1000	Select Revision			
Mission Statement	1110	Select Revision			
V					
C					
C					
F					

Restore Deleted Policies

Deleted policies that are restored will be added to the channel where the policy originally resided. If the chapter no longer exists, the policy will be restored at the chapter level.

Legend

- Restore Page

Name	Policy Number	Deleted Date	By User	
Remote Deposit Capture	2620	4/25/2021 1:16 pm		
Credit Union-Owned Credit Cards	3115	4/16/2021 10:51 am		
Payroll	3145	3/29/2021 2:05 pm		

Key Fields

- Key fields can be managed at the policy level, and at the policy level only the key fields present in the policy will show
- Users can access the Key Fields database to view/edit all key fields in one place
- The Key Fields database displays all key fields available for any model policy

- Key fields can be managed at the policy level, and at the policy level only the key fields present in the policy will show
- Users can access the Key Fields area to view/edit all key fields in one place
- The Key Fields area only displays those key fields in use in the current CU Policies manual

Search CU Policies: Search

- MANUAL ADMINISTRATION
 - EDIT CU POLICIES
 - 1000 - Administrative
 - 1000 - Lending
 - 2000 - Operations
 - 3000 - Accounting
 - 4000 - Security
 - 5000 - Asset/Liability Management
 - 6000 - Investments
 - 7000 - Lending
 - 8000 - Other Real Estate Owned (OREO)
 - 9000 - Federal Regulations
 - 10000 - Records Retention
 - 11000 - Fair Credit Reporting Act (FCRA)
 - MANAGE POLICIES & SETTINGS
 - Add Model Policies to CU Policies Manual
 - Add Unique Policies and Chapters
 - Manage Date Settings
 - Manage Publishing Setting
 - Archive Policies
 - Manage Key Fields
 - Delete Policies
 - PUBLISHING TOOLS
 - REPORTS
 - Update This Menu Tree

Key Field Name	Description	Current Value
10100-1	Insert State.	[10100-1]
1110-1	Insert entire Credit Union Mission Statement.	Mission
1120-1	Insert Credit Union Vision Statement.	Vision
1130-1	Insert Credit Union values.	Values
1140-1	Insert summary of the Credit Union history.	[1140-1]

Key Fields

View/Edit Key Fields

Define or edit your Key Fields by changing the content in the "Value" field, then Save all changes using the SAVE button at the bottom of the screen. *Please note - if you make changes and do not click the SAVE button, your changes will be lost.*

This listing includes Key Fields available in the current policies found in your CU Policies manual and may change as policies are added or deleted from your CU Policies manual.

Keyword	Value	Description
1160-1	<input type="text"/>	Input the person responsible for managing and developing the strategic planning process.
1160-2	<input type="text"/>	Input the number of years in the future that the strategic plan will cover.
1160-3	<input type="text"/>	Input the month in which the strategic plan will be reviewed each year.
1160-4	<input type="text"/>	Insert the party responsible for establishing the measurement of goals.
1160-5	<input type="text"/>	Define who will provide the quarterly report to the Board on progress and adjustments to the plan
1200-1	<input type="text"/>	Specify the election procedures to be followed
1240-1	<input type="text"/>	The Credit Union should identify their appetite for risk. This can be broken out by different risk categories or by different areas within the credit union

Managing Dates

- Dates can be managed for multiple policies at once in the “Manage Date Settings” utility
- All policies can be selected at once

- Dates can be managed for multiple policies at once under the “Manage Policy Settings” tab
- All policies can be selected at once and all policies in a single chapter can be selected at once

The screenshot shows the 'Manage Date Settings' utility. On the left is a navigation tree with categories like 'MANUAL ADMINISTRATION', 'MANAGE POLICIES & SETTINGS', and 'PUBLISHING TOOLS'. The main area is titled 'Manage Date Settings' and contains the following sections:

- Choose the date field to update:** A dropdown menu set to 'Revised Date'.
- Choose the action to perform:** A radio button selected for 'Update the dates for selected policies'.
- Enter date to update Revised Date:** An empty text input field.
- Choose the policies to apply the date updates:** A list of checkboxes for various policy categories and sub-categories, such as '1000: Administrative (Revised Date: NONE)', '1150: Field of Membership (Revised Date: NONE)', '1160: Strategic Planning (Revised Date: NONE)', and '1220: Bond and Insurance Coverage (Revised Date: NONE)'. There are also 'Check All' and 'Uncheck All' links.

The screenshot shows the 'Manage Policy Dates' utility. At the top, there are tabs for 'Manage CU Policies', 'Import Model Policies', 'Move Policies', 'Reorder Policies', and 'Manage Policy Dates' (which is highlighted with an orange box). Below the tabs, the title 'Manage Policy Dates' is displayed. The main area contains:

- Select a date field to modify:** A dropdown menu set to 'Revised Date'.
- Select one or more policies to update field: "Revised Date":** A section with 'Select All Policies' and 'Unselect All Policies' links. Below this is a list of checkboxes for policy categories, including 'Administrative', 'Strategic Planning', 'Equal Opportunity Statement', 'Organization', 'Board of Director's Duties', 'Compensation, Reimbursement, and Indemnification', and 'Bond and Insurance Coverage'. The 'Administrative' checkbox is highlighted with an orange box, and it has sub-links for 'Select Sub-Policies' and 'Deselect Sub-Policies'.

Publishing

- Publishing a manual creates a printable point-in-time document of selected policies
- Users must go to a separate “Publishing Settings” area to choose policies to be included

- Publishing a manual creates a printable point-in-time document of selected policies
- Policies to be included in a published manual are chosen at the time of publishing

Search CU Policies: Search

Publish Policies: 123 Training CU

It is recommended to review the [Publishing Settings](#) before publishing. Please note that the default for the Administration area of CU PolicyPro.

The following options will allow you to customize your published document:

Published Document Name:

[Click here to suppress the organizational name from the title page](#)

[Click here to include the Published Date on the title page](#)

Policy Order By Chapter
Order all policies in each chapter by: Policy Number Policy Name

Include Chapter/Policy Numbers on Publish
In Table of Contents and Chapter/Policy Titles: Yes No

Additional text on Title Page
To be placed just below the Published Document Title and Organization Name:

Manage Publishing Settings

Check the Chapter Box to suppress all policies from a particular chapter

	Include	Do Not Include
<input type="checkbox"/> 1000: Administrative		
<input type="checkbox"/> 1160: Strategic Planning	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> 1170: Equal Opportunity Statement	<input type="radio"/>	<input checked="" type="radio"/>
<input type="checkbox"/> 1220: Bond and Insurance Coverage	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> 1235: Education & Volunteer Training Guidelines	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> 1600: Code of Ethics and Diversity	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> 1615: Privacy	<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> 2000: Operations		
<input checked="" type="checkbox"/> 3000: Accounting		

Publishing

Publish New Manual

Please note: Published Manuals assigned to one or more User Groups will automatically

Published Document Name: *

Add Organization

Yes

Add Logo to the title page

No

Add Published Date

Yes

Include Policy Numbers

Yes

User Groups Authorized to View Manual:

Policies Included in Manual: *

Select Policies

Select one or more policies to include in published manual.

[Select All Policies](#) | [Unselect All Policies](#)

- Administrative
- Strategic Planning
- Equal Opportunity Statement
- Organization
- Board of Director's Duties

Posting Published Manuals

- Access to view published manuals is determined by the user's access level – there are two pre-defined access levels
- Published manuals can be viewed from the Home page and users can see all published manuals under “Employee Access,” as well as those under “Manager Access,” if they have access

- Access to view published manuals is determined by the user's access level and/or associated security groups defined by the credit union – there are four pre-defined access levels and unlimited groups can be created.
- Published manuals can be viewed from the Home page and users can only see the published manuals listed that they have access to (if any)

View and Post Published Policy Documents

Click on the Published Document name link to view and print any published document. Use the check "SAVE" button to change the viewing rights. If selected, the Published Document will appear in the ho

[Jolt CU \(PDF Version\)](#) (published: April 21st, 2021 01:56:10 PM)
 Allow Employees to View
 Allow Managers To View

[Star of Texas \(PDF Version\)](#) (published: April 19th, 2021 04:36:38 PM)
 Allow Employees to View
 Allow Managers To View

[Contingency Policies \(PDF Version\)](#) (published: March 25th, 2021 04:54:04 PM)
 Allow Employees to View
 Allow Managers To View

[Construction Loans Policy \(PDF Version\)](#) (published: March 24th, 2021 04:22:27 PM)
 Allow Employees to View
 Allow Managers To View

[Sample CU PolicyPro Published Document \(PDF Version\)](#) (published: July 2nd, 2020 01:15:34 PM)
 Allow Employees to View
 Allow Managers To View

[123 Training CU Policies \(PDF Version\)](#) (published: July 2nd, 2020 01:11:46 PM)
 Allow Employees to View
 Allow Managers To View

Published Document Name: *

For Examiner Review

User Groups Authorized to View Manual:

Board Members, Examiners

✓ Check all ✕ Uncheck all

Accounting Editor

Admin Only

Assignments Only

Board Members

Editing Only

Uploading Documents

- Documents are uploaded in the “CU Documents” area and housed in the “Root” folder, which is only available from CU Documents, or in the “Employee” or “Manager Resources” folders, which are visible from the Home page



- Documents are uploaded in the “Files” area and housed in the “Files” folder, which is only available from the Administration area, or in the “Resources” folder, which is visible from the Resources page
- Access to folders or files posted by the credit union in Resources can be restricted to specific users by Security Groups, either at the folder level or the document level

CU Documents

The CU Documents area allows users to upload files and store them within CU PolicyPro. Documents can be stored in the CU Documents area, or posted on the CU PolicyPro homepage by uploading them to the “Manager Resources” or “Employee Resources” folders.

Note: All documents placed in the “Manager Resources” folder will be available on the home page to users with access to “Manager Resources”. All documents placed in the “Employee Resources” folders will be available on the home page to all users who have access to the system. Documents placed in any other folder are only available through the CU Documents area.

To Begin: Select the folder in which you wish to place the file and click Browse to begin the upload process.

File(s) to Upload No file selected. [Add Another File](#)

(large files may take several minutes to upload)

Current Folder: /Employee Resources

Folders	New Folder	Name	Size	Last Modified	
Root		Policies to Review.docx	13k	Apr 22, 2021 6:48 AM	
Employee Resources		Policy_10004 - Table 4 - Electronic Funds Transfer Records - REDLINED.docx	17.89k	Apr 22, 2021 6:48 AM	
Manager Resources					
opfiles					
_thumbs					
images					

Files ✳ When you are done managing your files, close this window to return to CU PolicyPro.

	Filename	Size	Modified
<input type="checkbox"/>	Board-Minutes-October-2019.pdf	345 KB	4/21/2021 12:17 pm
<input type="checkbox"/>	Escheat-Requirements-proposed-changes.docx	72 KB	4/23/2021 11:36 am
<input type="checkbox"/>	October-2020-Agenda.docx	63 KB	4/18/2021 9:30 am
<input type="checkbox"/>	Planning-Documents-1.docx	31 KB	4/18/2021 9:30 am
<input type="checkbox"/>	Planning-Documents-2.docx	146 KB	4/18/2021 9:30 am

Select All Select None (0 out of 5 items selected) With Selected:

Set User Groups:

Public Security Groups:

Viewing Resources

- Posted documents are found on the Home page and system documents posted by CU PolicyPro staff are available in the Resources area

- Uploaded files and folders created under the “Resources” folder in the Files area are visible on the Resources page and available to users with appropriate access
- System documents posted by CU PolicyPro staff are found on the Resources page and are available for all users
- Posted documents can be organized in sub-folders



CUPolicyPro 123 Training CU

Policies | Resources | CU Documents | Administration | Training/Support | Home

Newsletters | Tools | Updates

2021 Newsletters

2020 Newsletters

- 01-January-Important_Effective_Dates.pdf
- 01-SpecialEdition-Content_Updates.pdf
- 02-February-2020-Supervisory-Priorities-and-Resources.pdf
- 03-March-2020-of-Agency-Reli-Publications-for-Unions-COVID
- 04-April-2020-of-Agency-Reli-Publications-for-Unions-COVID
- 04-April-2020-Updates.pdf
- 05-May-2020-Content-Update
- 06-June-2020-Content-Update

Resources

The Resources area contains important information such as monthly newsletters, policy newsletters, and system documents.

The Resources area is divided into three sections:

- Newsletters.** This is an archive of our monthly newsletter.
- Tools.** This section includes sample forms that can be used to supplement your policy.
- Updates.** The model plan is reviewed periodically, usually twice a year. New sections in the Updates area include information about previous updates.

Published Policies - Manager Access:

- [Policies for Board Review April 2018 \(PDF Version\)](#) (Date Published: 04/12/2018)

CU Documents - Manager Access:

- [Appendix to Policy 1542 - Loan Rates.xlsx](#)
- [Loan Limit Chart.csv](#)
- [New Employee Signature Form.docx](#)
- [Update Overview for Board - December 2016.docx](#)

Published Policies - Employee Access:

No policies have been posted.

CU Documents - Employee Access:

- [Policies to Review.docx](#)
- [Policy 10004 - Table 4 - Electronic Funds Transfer Records - REDLINED.docx](#)

Resources

Resources | Support | Administration | Log Out

For everyone | For the Board | Newsletters | Only for Admins

Sample Forms and Documents | Something for Everyone | System Documentation

Resources

Back to previous folder

- 2021
- 2020

Resources

Back to previous folder

- Board Minutes October 2019.pdf
- Escheat Requirements proposed changes.docx
- October 2020 Agenda.docx
- Planning Document 1.docx
- Planning Document 2.docx

User Access

- Two default access levels (Admin and Employee)
- Custom access levels are created to assign user rights, including access to CU Documents
- Users either have access to all policies and policy functions or view-only access to all CU policies



- Four default access levels (Admin, Editor, Reviewer, Basic)
- Security Groups are used to give additional rights to non-Admin users, including access to:
 - Publish and/or use the Archive for all CU policies
 - View/edit/delete CU policies (determined down to the individual policy level)
 - View uploaded files on the Resources page

Administration

Users

User: [-Group-, Koelzers]

User Name: koelzers

Group Description: koelzers

Password (if changing, please fill in):

Re-Type Password:

Access Levels

Access Level: board

CU PolicyPro

- Policies (full access)
- Policies (view access - read only)
- Resources
- CU Documents
- Home Page Folders - Manager Access

View/Edit Users

Users Groups

New users can be created as "Admin" or "Basic User" type. "Admin" users will have no rights restrictions. "Basic User" should be added to one or more groups, which will determine the user's access. The specific access rights for each group are assigned under the "Groups" tab. Note users added to multiple groups will have all rights within all the selected groups.

Add New User

Filter: All Groups

ID	First Name	Last Name	E-Mail
<input type="checkbox"/> 77	Some		
<input type="checkbox"/> 72	Eva		
<input type="checkbox"/> 73	Mary Ann		
<input type="checkbox"/> 78	Board		
<input type="checkbox"/> 80	Editor		
<input type="checkbox"/> 81	Reviewer		

View/Edit Groups

Add Group

ID	Name
<input type="checkbox"/> 3	Accounting Editor
<input type="checkbox"/> 12	Admin Only
<input type="checkbox"/> 10	Assignments Only
<input type="checkbox"/> 11	Board Members
<input type="checkbox"/> 9	Editing Only

Administration Rights For: Board Members

Access

If all options are set to "Off", the Administration navigation link will not be visible to users added to this group. If one or more of the options set below.

	Off	On
CU Policies	<input type="radio"/>	<input checked="" type="radio"/>
Archived Policies	<input type="radio"/>	<input checked="" type="radio"/>
Assignments	<input checked="" type="radio"/>	<input type="radio"/>
Files	<input checked="" type="radio"/>	<input type="radio"/>
Messaging	<input checked="" type="radio"/>	<input type="radio"/>
Publishing	<input type="radio"/>	<input checked="" type="radio"/>

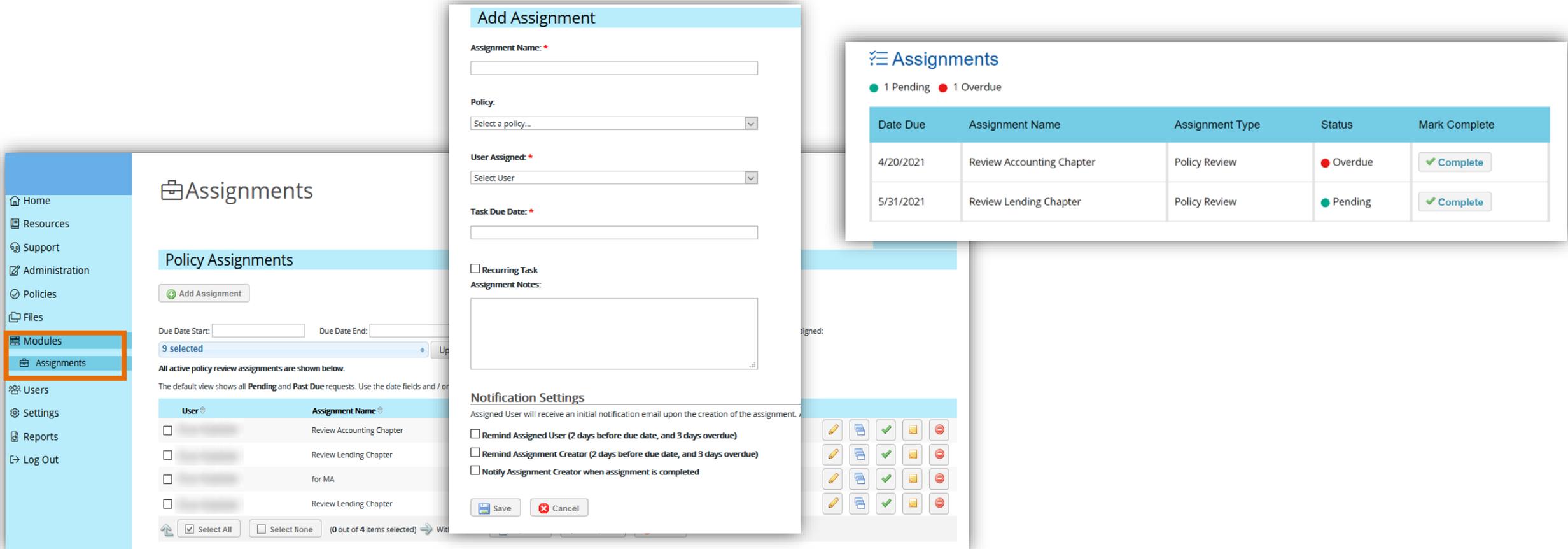
Configure Per-Policy Access

Save Changes

Assignments

In the new system there is a new feature that allows users to be assigned policy reviews.

- An email notification is sent to the person assigned the review, and additional notifications can be set to send notifications 2 days before and 3 days after the due date, and/or to send a notification when the assignment is completed
- A user's own assignments are displayed on the Home page



The screenshot displays the 'Assignments' module interface. On the left is a navigation sidebar with 'Assignments' highlighted. The main content area is divided into two sections: 'Add Assignment' and 'Policy Assignments'.

Add Assignment Form:

- Assignment Name:** Text input field.
- Policy:** Dropdown menu with 'Select a policy...'.
- User Assigned:** Dropdown menu with 'Select User'.
- Task Due Date:** Text input field.
- Recurring Task**
- Assignment Notes:** Text area.
- Notification Settings:** Three checkboxes:
 - Remind Assigned User (2 days before due date, and 3 days overdue)
 - Remind Assignment Creator (2 days before due date, and 3 days overdue)
 - Notify Assignment Creator when assignment is completed
- Buttons:** Save, Cancel

Policy Assignments Table:

9 selected

All active policy review assignments are shown below.

User	Assignment Name	Date Due	Assignment Type	Status	Mark Complete
<input type="checkbox"/>	Review Accounting Chapter	4/20/2021	Policy Review	Overdue	<input type="button" value="Complete"/>
<input type="checkbox"/>	Review Lending Chapter	5/31/2021	Policy Review	Pending	<input type="button" value="Complete"/>
<input type="checkbox"/>	for MA				
<input type="checkbox"/>	Review Lending Chapter				

0 out of 4 items selected