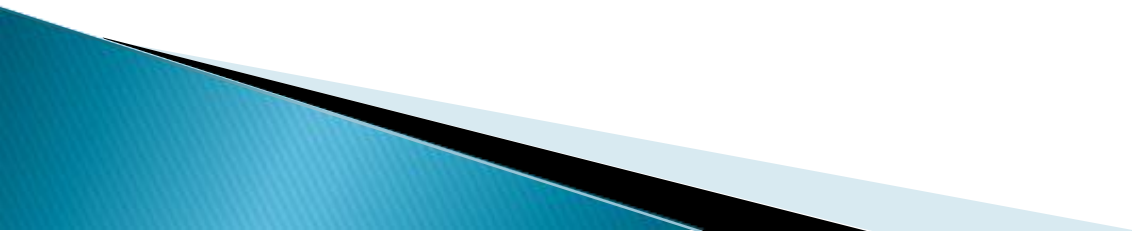




All About Policies

How Credit Unions Use CU PolicyPro

- ▶ Model policy resource center
 - ▶ Policy management system
 - Model policy resources center
 - Creating, storing, and distributing policies
 - Auditing and Maintenance
 - Policy Review Assignments
- 

Terminology

- ▶ **Model Policies/Model Policies Manual.** Policy templates created and updated in response to federal law.
- ▶ **CU Policies/CU Policies Manual.** The credit union's own policies which can be customized and managed using the policy management tools.
- ▶ **Published Manual.** A point-in-time document including several CU Policies
- ▶ **Key Fields.** Specific credit union information defined and used in the policies as part of the customization process.
- ▶ **Administration/Administration Area.** The area of CU PolicyPro where the credit union's policies are managed, published, and distributed.
 - In addition, resources are uploaded, assignments are created, and users are managed in this area.
- ▶ **User Groups/Groups.** Created and assigned in the *Users* area, groups provide additional access rights to non-admin users.

User Access Levels

as they relate to Policies

Default Access Levels

- ▶ **Admin** – full, unrestricted access to perform any function in CU PolicyPro.
- ▶ **Editor** – full, unrestricted access to perform any function related to CU Policies (view/add/edit/delete/publish/archive) and can see all published manuals.
- ▶ ***Reviewer** – full, unrestricted access to **view** all policies and can see all published manuals.
- ▶ ***Basic** – view access to model policies and published manuals available to all users
- ▶ ***Limited** – view published manuals available to all users

*these access levels can be augmented with *User Groups* to provide viewing access to specific published manuals and/or to add additional rights to policies (view/add/edit/publish/archive)

Additional Information

- ▶ If you do not have a login to CU PolicyPro, or are having trouble logging in, contact our support staff (polycysupport@cusolutionsgroup.com)
- ▶ Quick Guides related to today's training (found in the Support area of CU PolicyPro)
 - Getting Started
 - Viewing and Printing Model Policies
 - Viewing and Printing CU Policies
 - Adding Model Policies to the CU Policies Manual
 - Adding Unique Policies to the CU Policies Manual
 - Deleting Policies from the CU Policies Manual
 - Editing CU Policies: Overview
 - Editing CU Policies: The Toolbar
 - Editing CU Policies: Formatting Bulleted and Numbered Lists
 - Editing CU Policies: Key Fields
 - Editing CU Policies: Managing Dates
 - Editing CU Policies: Auditing Tools
 - Publishing CU Policies