CUPolicyPro ✔

✔ Dear CU PolicyPro Client

It's hard to believe how quickly the year is rushing by! Did you have any New Year's Compliance Resolutions that are not quite done yet (or perhaps not even started)? If one of your unfulfilled resolutions was to get your policies in order, NOW is the time to act and get those checked off the list before the end of the year!

We do receive a number of questions from clients about how to get started with CU PolicyPro. This month's newsletter focuses on some tips and ideas to get the ball rolling and give you the momentum you need to tackle this project once and for all!

Today's tip: Before you begin, make sure you can log in! The URL to access CU PolicyPro is https://policypro.leagueinfosight.com. There is a forgotten password link if you need help remembering, or you can contact our support staff at policysupport@cusolutionsgroup.com for assistance.

✔ Setting Up and Customizing CU PolicyPro

There is no one "right" way start using CU PolicyPro, however the following key steps have worked well for many clients.

Step 1. Get Trained. CU PolicyPro is fairly intuitive and easy to use; however, as with any software system, simple training can go a long way to help you learn the easiest and most efficient ways to use the system. New User Training is about two hours from start to finish, and is broken into short segments if you just need a refresher. To access the video training series, login to CU PolicyPro and click on the "Training/Support" link in the top menu to access the Support Site and watch the new user training videos. *The training videos cover the "how to" of the next several steps, so be sure not to skip this step!*

Step 2. Choose 10-15 policies to start. CU PolicyPro provides more than 230 model policies. To avoid being overwhelmed, choose 10-15 policies (or less!) as a starting point.

The CU Policies manual was set up with the chapter folder structure, but no model policies were added. Use the "Add Model Policies to CU Policies Manual" Utility under MANAGE POLICIES AND SETING and add in a select set of policies that you are ready to work with.

(Note: if your manual has been in use for some time, there may already be policies in the CU Policies Manual.)

Step 3. Print the Key Fields Guide from the Resources area. This printed guide can be used to gather information specific to your credit union that will be used during the customization step for your manual. The Key Fields Guide shows the minimum that will need to be customized in each policy. Look for each policy that you are ready to customize to see if Key Fields are included in the policy. Do any research needed to define how the Key Fields will be customized for your credit union. (Note: additional customization within the policy may also be necessary.)

Step 4. Customize Your Policies. Review the policies you've selected in your CU Policies Manual and use the text editor tool to customize each policy to conform to the actual business practices used by your credit union.

Step 5. Add Additional Policies, if needed. Bring in additional model policies as you're ready to work on them, or use the "Add Unique Policies" feature under MANAGE POLICIES AND SETTINGS to add policies which do have not a model version available.

Step 5. Review State Law Issues. Make any edits in the Manual that are required to conform to your specific state statutes and regulations.

Step 6. Publish Your Manual. The Publishing feature allows you to choose a designated set of policies to put into a single printable document. This can range from a few policies for the Board to review to a complete set of all updated/approved policies to provide to staff, and anything in between. This is the easiest way to distribute your policies to those who need them.

Step 7. Make Your Policies Available. Published manuals can be posted to home page of CU PolicyPro for authorized users to access, or saved as a PDF for internal distribution.

If you need help with any of the suggested steps, have questions on content, or need general technical support, please contact policysupport@cusolutionsgroup.com.

✔ Content FAQs

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

A. 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.

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.

Q. What if a new regulation goes into effect and there's no policy in CU PolicyPro yet?

A. Because CU PolicyPro is reviewed/updated quarterly, sometimes a new regulation will be effective between updates. We generally try to communicate in this newsletter what will be in an upcoming policy at the next update, as long as we have the pertinent information from the regulators. Sometimes all we can tell you is that "it's coming" and give you as much information as we have until final approvals are received to complete a policy for you.

✅ Technical FAQs

Q: Can I use CU PolicyPro to keep track of my procedures?

A. Many credit unions use CU PolicyPro to manage their procedures. Here are the two most common ways credit unions incorporate procedures into CU PolicyPro:

1. **Upload procedure documents to the system through the CU Documents area and post them on the home page.** This often works very well and is easy because you don't have to do anything special to the existing procedure documents. However, if you have many separate documents for procedures, it can be hard to post them all on the home page. Also, remember if the source document is updated, you have to re-upload it to the system, or users accessing the system may be using out of date information.

2. **Create a new chapter for sets of procedures.** A new chapter can be added by creating a new chapter folder (something divisible by 1000, like 12000, 13000, etc). Some credit unions try to align it by adding 20,000 to the policy number (so the Policy for Auto Loans would be 7205, and the Procedure would be 27205). You can't use +10000 because 10000 and 11000 are already in use. This method allows you to have a some correlation between where to find the policy and the related procedure, and by putting procedures in their own chapter folder, publishing is really easy – you can publish procedure manuals, or put the related policies and procedures together in one published manual, but the two are still distinct and separate from each other.

If you have any additional questions or need further assistance, 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.