

Staff Training Plan Worksheet

Attention Education Coordinators: Make copies of this handy form and use it to track the training needs and progress for your credit union's staff. You can even use this as a way for staff to request the courses they would like to attend.

Employee Name: _____

	Course	Should Attend	Date Attended
Online University Courses			
CAB 100	CU*BASE General Ledger 1		
CAB 200	Daily Share Draft Processing		
CAB 201	Daily Share Draft Processing		
CAB 202	Daily Payroll Processing		
CLS 100	Lending Basics		
CLS 101	Lending 2: Creating and Disbursing Loans for Members and Non-Members		
CMS 100	Report Builder – Using Canned Queries		
CMS 101	Report Builder – Basic Custom Queries		
CNV 100	Preparing for your Conversion to CU*BASE		
CNV 101	Leading Change: Conversion Preparation for CU Management		
CTM 100	Welcome to CU*BASE GOLD		
CTM 101	Menus, Screens, & Navigation		
CTM 102	Rate Inquiry, Loan Quoter, and the Timeout Window		
CTM 200	Member Inquiry		
CTM 201	Phone Operator		
CTM 300	Opening Memberships and Accounts		
CTM 400	Teller Processing 1		
CTM 401	Teller Processing 2		
CTM 900	e-Receipts and Photo ID Capture		
Classroom Sessions			
Teller / Member Service			
0.10	Introduction to CU*Answers CU*BASE		
0.50	CU*BASE Communication Tools		
0.60	CU*SPY Online Report and Statement Retrieval		
0.70	CU*CD: Archiving and Retrieval for Statements and Reports		
1.00	Introduction to Teller Processing		
1.01	Member Services - Inquiry and Phone Operator		
1.20	Teller Techniques and Shared Branching Options		
1.30	Head Teller Vault/Change Fund Management		
1.40	Day-to-Day Certificates		
1.50	Day-to-Day Savings Products		
1.60	Day-to-Day IRAs		
1.70	Day-to-Day Loan Servicing		
Supervisory / Management			
2.00	CU*BASE Employee Security		
2.10	Designing Savings and Certificate Products		
2.11	Misc. Member Account Forms: TIS Disclosures, Membership Cards...Get Creative!		
2.20	CU*Answers Web Services: Developing a Credit Union Strategy		
2.21	Managing Self-Service Delivery Products: Audio & Online Banking		
2.21W	Workshop: Setting Up Virtual Member Services		
2.25	Personal Internet Branch (PIB): Layered Security Controls and Member Personalization for Online Banking		

	Course	Should Attend	Date Attended
2.30	Rate Maintenance & CU*BASE Tools for Pricing Products		
2.40	Variable Rate Products and CU*BASE Tools		
2.50	CU*BASE Operations		
2.60	CU*BASE Management Tools: A "Window" to Day-to-Day Credit Union Activity		
2.61	CU*BASE and Key Regulations (Reg. D, Dormancy and Reg. E)		
2.62	Managing Compliance: Preparing for Audits and Examinations		
2.80	Member Fees and Bundled Services		
2.95	CU Budget and Strategic Planning Tools		
Accounting / Back Office			
3.00	Introduction to Accounting		
3.10	Introduction to General Ledger Tools		
3.15	Advanced General Ledger		
3.20	➡ Balancing Made Easy		
3.25	➡ SRS Bookkeeping Services – Sharing our Policies and Procedures		
3.30	Credit Union Checks and Accounts Payable		
3.40	CU Financials: Configuration, Printing, and Other Options		
3.50	GL Subsidiary Products: Fixed Assets, Prepaid Expenses, and Accrued Expenses		
3.50W	Workshop: Setting Up Subsidiaries		
3.51	GL Subsidiary Products: Working With Investments		
3.51W	Workshop: Setting Up Investments		
3.60	Member Checking/Vendor Accounting and Suspense GLs		
3.62	Member Payroll and ACH Products		
3.63	ATM Processing		
3.70	Item Processing Functions		
3.71	Understanding CU*BASE Transactions		
3.80	CU*BASE Data Retention Issues		
3.90	Participation Lending: Understanding the Settlement Process		
Marketing / Sales			
4.00	CU*BASE Data Structure: Understanding Computer-Stored Data		
4.10	CU*BASE Marketing and Sales Tools		
4.15	Member Service Trackers / Leads and Follow-ups		
4.20	Report Builder 1: Working With Computer-Stored Data for Reports and Inquiries		
4.21	Report Builder 2: Building Custom Queries		
4.25	Partners In Practice: How to do the work – Marketing Workshop		
4.30	Success Through Marketing Basics...Be a Hero!		
4.40	CU Statements		
4.80	Relationship Management: Clubs and Tiered Service Programs		
Lending			
5.00	Designing CU*BASE Loan Products		
5.10	Lending From Request to Disbursement: Understanding the Application Process		
5.11	➡ CU*BASE Mortgage		
5.12	➡ CU*BASE Escrow Processing		
5.15	➡ Investor Relations		
5.20	Organizing a Loan Department and Servicing Loans on CU*BASE		
5.30	Open End and Line of Credit Lending		
5.40	Managing Bankruptcy		
5.50	Interactive Online Collections		
5.70	Centralized Underwriting: Inquiry for Loans in Process		
5.71	Laser Forms Management		
Lender*VP			
5.75	Implementing the 247 Lender Decision		
5.76	Managing Loan Delivery Channels		
5.77	Online Credit Card Processing – Product Overview		
5.78	Online Credit Card Processing – Back Office and Collections		
5.79	Lender RE: Real Estate Solutions		

	Course	Should Attend	Date Attended
5.80	Participation Lending Strategies		
Self Processing			
6.00	Organizing and Managing Your Operations Center		
6.10	iSeries System Security		
6.20	iSeries Management and System Tools		
6.30	Managing Your Hardware Resources and Relationships		
CU*BASE GOLD Workstations			
7.00	CU*BASE GOLD: Customizable Features/Tools		
7.15	CU*BASE Hardware & Communications		
7.20	CU*BASE GOLD Updates & Support		
7.25	Configuring CU*BASE Software		
7.30	Teller Cash Dispensers and CU*BASE		
7.50	iSeries File Transfers: Moving Data from CU*BASE to Your Personal Computer		
eDOC Innovations			
7.35	Getting Started with e-Documents		
7.36	➤ Your e-Document Strategy		
7.37	➤ Administering Your In-House eDOC Server		
General			
8.00	AnswerBook: Finding Answers to Your Questions and Tracking How Your Staff Uses CU*Answers Client Support		
8.10	Preparing for Month End & Statement Processing		
8.50	Online CUs: Planning for Year-End and Using the YE Processing Guide		
8.51	Self Processing CUs: Planning for Year-End and Using the YE Processing Guide		
8.53	Preparing for Multi-Corporation Processing		
8.55	➤ CU*EasyPay! Bill Payment: Product Overview and Daily Management		
SECURE-U			
9.15	Security Essentials		
9.35	The Armored Network: Network Security at CU*Answers		
9.55	The Human Side of Security		
9.65	Disaster Recovery and Business Continuity		