

CU*ANSWERS
UNIVERSITY

Education Catalog

2018



NEW THIS YEAR!
Asterisk Intelligence Week
HR-Related Courses
Learning Café



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A Letter to Clients



Dear clients,

I am excited to announce a very full education year in 2018! We are proud to offer 17 new courses, three new webinar series, and five new special training events!

In addition to adding three new courses to our Imaging Solutions course category, we're introducing three new course categories this year. Our Asterisk Intelligence category comprises six new courses designed to teach participants about the data-analytics and data-warehousing products we offer. Our Organizational Resource Development category offers five new courses related to human resources. Our Records & Information Management category includes two new courses that show participants how to develop an effective records management program.

Along with the courses we're introducing in 2018 are three new webinar series. The Analytics Booth webinar series will teach participants the ins and outs of our Analytics Booth external data warehouse. The Get Connected webinar series will help clients better understand the role of CU*Answers Management Services. Finally, the Learning Café webinar series will give participants the chance to learn about hot topics in the credit union industry while they enjoy lunch at their desk.

Courses and webinars aren't the only new training opportunities we're offering this year! We are proud to present five new special training events. The new Asterisk Intelligence Week will feature special training events and courses dedicated to guiding credit unions through the data-analytics and data-warehousing solutions that CU*Answers offers. During the new Xtend Early Bird Special Event, which will be held during Leadership week, Xtend clients will get the chance to hear from Xtend staff on their past successes and future direction. The new Lender*VP Week will condense all of our lending courses into one week for clients wishing to increase their lending expertise. The Sales & Marketing Week will give participants a chance to dedicate a weeklong timeframe to honing their sales and marketing knowledge. Topping off the list of new training events being offered this year is the Developers Help Desk, a new Executive Boot Camp event that will give participants the chance to work directly with our software developers on new projects in the pipeline.

Learn about these training offerings and more in the 2018 Education Catalog, brought to you by the CU*Answers Client Services & Education team and the CU*Answers Writing Team!

Sincerely,

A handwritten signature in black ink that reads "Laura Welch-Vilker". The signature is written in a cursive, flowing style.

Laura Welch-Vilker
CU*Answers Vice President of Client Services & Education

Registration Information

CU*Answers University Location

The CU*Answers University main training site is located at 6000 28th St. SE in Grand Rapids, MI.



Registration Procedures

Pre-Scheduled Training

CU*Answers offers a variety of pre-scheduled classroom and webinar courses whose dates and times are listed in the course schedules beginning on page 27. Registration procedures for this type of training are detailed below.

Classroom Sessions

Visit cuanswers.com/resources/edu/courses/?type=classroom_sessions&by_date=1 to register for classroom sessions listed in this catalog (those with and without a webcast option). Please register at least two business days in advance of the course date. After registering, you will receive a confirmation email. Learn more on page 5.

Webinars

Visit cuanswers.com/resources/edu/courses/?type=webconference&by_date=1 to register for webinars listed in this catalog. Please register at least two business days in advance of the course date. After registering, you will receive a confirmation email. Learn more on page 12.

Special Training Events

Special training events each have registration procedures specific to the event. Please see event descriptions beginning on page 14 for registration procedures.

Training Scheduled Throughout the Year

In addition to offering pre-scheduled training, CU*Answers also offers training scheduled throughout the year. To register, please watch for an email invitation, which will be sent to all those on the CU*Answers Client News email distribution list. To be added to this list, contact the CU*Answers Writing Team at clientnews@cuanswers.com.

Training Offered by Request

In addition to offering scheduled training, CU*Answers also offers the following training options by request. To request one of the training options listed below, contact the CU*Answers Client Services & Education team at education@cuanswers.com. Please include the desired training date, the number of

staff who will be attending, and the desired format (virtual or in-person). We will try our best to accommodate your preferences while honoring existing training commitments.

- Courses (see page 6)
- Workshops (see page 5)
- Individualized On-Site Training (see page 5)
- CU*BASE Custom Certified Trainer Program (see page 5)

Course Times

Most classroom courses are scheduled on weekdays between 9 AM and 4 PM ET. *(Note: All courses and training events listed in this catalog and on the registration site are in Eastern Time.)* Webinars are



generally scheduled after 11 AM ET to accommodate clients in Mountain and Central Time Zones.

Cost

All CU*Answers training is free of charge, including webinars. The only exception is customized training, which incurs a nominal fee due to the customization work involved. To request a quote for our customized training offerings, CU*BASE Custom Certified Trainer Program and CU*BASE CTE, contact the CU*Answers Client Services & Education team at education@cuanswers.com.

Cancellations/Substitutions




If you must cancel, please do so at least two business days in advance of your scheduled course date. Please remember that as an alternative to cancelling, anyone from your credit union may attend in your place. To cancel your course registration, contact the CU*Answers Client Services & Education team at education@cuanswers.com.

Training Offerings

In-Person Training

For those who prefer a face-to-face learning environment, CU*Answers University offers in-person training that covers a variety of CU*BASE-related topics. In-person training options are detailed below.

Classroom Training

Held at the CU*Answers University main training site in Grand Rapids, Michigan, classroom training sessions not only educate participants on the CU*BASE software, but also give them an opportunity to discuss best practices with their peers. For a full list of classroom sessions, see the course schedules starting on page 27 and look for the student  symbol. Some classroom training sessions have an on-demand equivalent, indicated by the 24-hour clock  symbol, and some are available to remote participants via webcast, indicated by the video camera  symbol. Learn more about webcast classroom sessions on page 11. For registration procedures (for classroom training sessions with and without a webcast option), see page 3.

CU*BASE Custom Certified Trainer Program

As part of this train-the-trainer program, CU*Answers Conversions staff equip credit union trainers with the skills and knowledge needed to train their team members on CU*BASE. Comprising seven CU*BASE courses, this training program is customized based on the size of the participating credit union. Learn more at cuanswers.com/pdf/lc2015/Certified_Trainer_Program.pdf. For information on requesting this type of training, see page 3.

Individualized On-Site Training

There are times when clients need training tailored to meet their credit union's unique needs, policies, and processes. When this is true, we encourage on-site training based on a time frame that best fits the client's schedule. While on-site training may incur a fee for instructor travel expenses, the actual time in class comes at no additional charge as it is included in monthly maintenance fees. For information on requesting this type of training, see page 3.

Special Training Events

For clients who enjoy training opportunities in which they have the chance to discuss industry hot topics with their peers in the cuasterisk.com network, we offer special training events. See page 14 to learn about these in-person training opportunities.

Workshops

Held at the CU*Answers University main training site in Grand Rapids, Michigan, hands-on workshops turn theory into practice. Workshops are the perfect option for credit unions that would like assistance

setting up the necessary configurations in CU*BASE to start using a new tool or feature. To view a full list of courses for which workshops may be requested, refer to the course schedules beginning on page 27 and look for the tools ✂ symbol. Learn more at cuanswers.com/resources/edu/workshops. For information on requesting this type of training, see page 3.

Courses Offered by Request

In addition to offering the courses listed in the course schedules beginning on page 27, CU*Answers also offers courses by request, all of which are listed below and on the following pages. For information on requesting the courses listed below, see page 3.

Courses Offered by Request

| Course # | Course Name | See Page |
|-------------------------------|---|----------|
| Teller/Member Service | | |
| 0.10 | Introduction to CU*Answers CU*BASE | 59 |
| 0.60 | CU*Spy Online Reports and Statement Retrieval | 60 |
| 1.00 | Introduction to Teller Processing | 61 |
| 1.40 | Day-to-Day Certificates | 65 |
| 1.50 | Day-to-Day Savings Products | 66 |
| 1.60 | Day-to-Day IRAs | 67 |
| 1.70 | Day-to-Day Loan Servicing | 68 |
| 1.80 | Teller Cash Dispensers, Recyclers, and CU*BASE | 69 |
| Supervisory/Management | | |
| 2.10 | Designing Savings and Certificate Products | 71 |
| 2.11 | Introduction to Miscellaneous Member Account Forms | 72 |
| 2.21 | It's Me 247 Online Banking | 73 |
| 2.25 | Providing Added Security in Online Banking with the Personal Internet Branch | 74 |
| 2.30 | Rate Maintenance & CU*BASE Tools for Pricing Products | 75 |
| 2.40 | Variable-Rate Products and CU*BASE Tools | 76 |
| 2.50 | CU*BASE Operations | 77 |
| 2.60 | CU*BASE Management Tools: A Window to Day-to-Day Credit Union Activity | 78 |
| 2.80 | Member Fees and Bundled Services | 79 |
| 2.95 | CU Budget and Strategic-Planning Tools | 80 |
| 2.96 | Using AnswerBook to Find Answers and Track Staff Questions | 81 |
| Accounting/Back Office | | |
| 3.00 | Introduction to Accounting | 82 |
| 3.10 | Introduction to General Ledger Tools | 83 |
| 3.30 | Credit Union Checks and Accounts Payable | 88 |
| 3.50 | General Ledger Subsidiary Products: Fixed Assets & Prepaid and Accrued Expenses | 90 |
| 3.51 | General Ledger Subsidiary Products: Working with Investments | 91 |
| 3.60 | Member Checking, Vendor Accounting, and Suspense General Ledger Accounts | 92 |



Courses Offered by Request

| Course # | Course Name | See Page |
|--|---|----------|
| 3.63 | ATM Processing | 94 |
| 3.80 | CU*BASE Data-Retention Issues | 96 |
| 3.96 | Preparing for Multi-Corporation Processing | 98 |
| Marketing/Sales | | |
| 4.00 | CU*BASE Data Structure: Understanding Computer-Stored Data | 99 |
| 4.23 | iSeries File Transfers: Moving Data from CU*BASE to Your PC | 107 |
| Lender*VP | | |
| 5.15 | Investor Relations | 117 |
| 5.71 | Laser-Forms Management | 123 |
| 5.80 | Participation Lending Strategies | 127 |
| Self-Processing | | |
| 6.00 | Organizing and Managing Your Operations Center | 131 |
| 6.10 | iSeries System Security | 132 |
| 6.20 | iSeries Management and System Tools | 133 |
| 6.30 | Managing Your Hardware Resources and Relationships | 134 |
| Network Services* | | |
| 7.00 | CU*BASE GOLD: Customizable Features/ Tools | 136 |
| 7.15 | CU*BASE Hardware & Communications | 137 |
| 7.20 | CU*BASE GOLD Updates & Support | 138 |
| 7.25 | Configuring CU*BASE Software | 139 |
| Enterprise Risk Management | | |
| 8.03 | Key Factors to Evaluate in Your Agreements | 142 |
| 8.04 | Using CU*BASE to Calculate Risk | 143 |
| 8.05 | Fundamentals of Enterprise Risk Management | 144 |
| Imaging Solutions | | |
| 11.00 | Creating/Improving Your Imaging Strategy | 156 |
| 11.01 | Using CU*BASE Loan Forms with Imaging Solutions | 157 |
| SettleMINT EFT | | |
| 12.04 | It's Me 247 Bill Pay Powered by Payveris: Product Overview and Daily Management | 165 |
| 12.05 | Online Credit Card Processing: Product Overview | 166 |
| 12.06 | Skip-a-Pay Program Implementation for Online Credit Cards | 167 |
| 12.07 | It's Me 247 Bill Pay Powered by Fiserv: Product Overview and Daily Management | 168 |
| 12.08 | It's Me 247 Bill Pay Powered by iPay: Product Overview and Daily Management | 169 |
| Internet Retailer Support Center (IRSC) | | |
| 13.00 | Customizing Your Online Experience: It's Me 247 Online, Mobile, and Text Banking | 170 |

*These courses can be requested or taken as part of the Network Services IT Boot Camp. See page 24 for details.

Online Training

For credit union staff who prefer learning at their own pace and on their own schedule, CU*Answers University offers online training that covers a multitude of topics related to CU*BASE, soft skills, and compliance. From video tutorials to courses available through the CU*Answers University online campus, there is something for everyone. Following is a complete list of online training options.

Booklets and Other Documentation

AnswerBook

This online database includes thousands of questions and answers about CU*BASE and is a very popular resource among clients seeking to learn more about CU*BASE. Each time the CU*Answers Client



Services & Education team is contacted with a client question about CU*BASE, the question and answer is documented in AnswerBook. Access this resource at kb.cuanswers.com/cuanswers/ext/kbsearch.aspx.

Building the Factory Instructional Manuals

This series of “do it yourself” instructional guides shows clients how to harness the power of the CU*BASE toolset to conduct marketing campaigns that will help their credit union increase product sales. With step-by-step instructions that take clients from launching a campaign to analyzing the results, these guides make it easy to unlock the revenue-generating opportunities within CU*BASE. Access this resource at cuanswers.com/resources/building-the-factory.

CU*BASE Reference Materials

This site includes booklets on various CU*BASE-related topics and is an excellent resource for staff who are looking to become more familiar with a particular CU*BASE feature or tool. Access this resource at cuanswers.com/resources/doc/cubase-reference.

“It’s Me 247” Reference Resources

This site includes reference materials related to **It’s Me 247** Online, Mobile, and Text Banking. The site also includes documentation on related products such as MoneyDesktop, CU Mobile Apps online banking app, and the various online bill pay options that CU*Answers offers. Access **It’s Me 247** reference resources at cuanswers.com/resources/doc/its-me-247-reference.

Special Interest Publications

These online publications cover topics beyond the CU*BASE software and are especially good for credit union leaders and key personnel to help them make the most of their relationship with CU*Answers. Access this resource at cuanswers.com/resources/doc/special-interest-publications.

Understanding Your CU*BASE Invoice

This resource, designed for credit union accountants and CEOs, explains the ins and outs of the CU*Answers monthly invoice and how clients can correlate CU*Answers pricing and monthly invoices

with the way their credit union earns. It includes a sample invoice, billing code information, and a sample credit union five-year pricing overview. Visit cuanswers.com/solutions/accounting/client_invoice to access this resource.

Education Report Newsletter

This monthly newsletter keeps clients informed of upcoming courses and training events. Subscribe to this newsletter at cuanswers.com/resources/doc/newsletters.

For the Record Newsletter *NEW!*

Read this quarterly newsletter for tips on developing an effective records and information management (RIM) program that meets business needs and helps you comply with regulations. The newsletter also includes news on the latest RIM happenings as they relate to the credit union industry. This newsletter does not require a subscription; each time a newsletter is published, it will be emailed to all those on the CU*Answers Client News email distribution list.

SettleMINT EFT Newsletter

The CU*Answers SettleMINT EFT team understands how important card servicing, bill payment, and shared branching can be for your members, so they offer this quarterly newsletter to keep you updated on the latest products and news related to electronic funds transfer services. Subscribe to this newsletter at cuanswers.com/resources/doc/newsletters.

On-Demand Courses

Free Online Campus

CU*Answers University offers a wealth of on-demand courses, both credit union-specific and CU*BASE courses, all available at no charge through the CU*Answers University free online campus. Learn more about this resource at cuanswers.com/pdf/education/FreeCampusFlyer.pdf. Many of the courses listed in the course schedules beginning on page 27 have an on-demand course equivalent, indicated by the 24-hour clock ⌚ symbol. This allows those who cannot attend the scheduled course to take the on-demand equivalent at a time convenient for them. To access on-demand courses, click the *Network Links* button in CU*BASE and select *CU*Answers University*.



Free Online Campus with Administrator Access

With administrator access to the free campus mentioned above, online campus administrators have the ability to track learning progress, award certificates of completion, and design individual development plans. To obtain administrator credentials, contact the CU*Answers Client Services & Education team at education@cuanswers.com.

Expanded Online Campus

The expanded campus includes everything the above-mentioned free campus includes, plus 76 additional credit union-specific on-demand courses, 5 additional course categories, a course-authoring

tool with which to customize courses with your specific credit union content, branding capabilities, and more! Learn more at cuanswers.com/pdf/education/PurchaseYourOwnOnlineCampus.pdf.

Online Campus Administrator Training

This 45-minute webinar is a primer for newly designated CU*Answers University online campus administrators wishing to learn how to manage online learning for their employees. To register, please watch for an email invitation, which will be sent to all those on the CU*Answers Client News email



distribution list. Contact the CU*Answers Writing Team at clientnews@cuanswers.com to be added to this list.

Online Help

CU*BASE GOLD Online Help

One of the most widely used training resources offered to CU*Answers clients, this robust and comprehensive online help system includes a topic that corresponds to each of the thousands of screens that make up CU*BASE GOLD. This library of CU*BASE-related information helps clients become power users of CU*BASE GOLD. Access this resource at help.cubase.org/cubase/cubase.htm.

“It’s Me 247” Online Help

Designed for members using **It’s Me 247** Online Banking, this resource is also helpful to credit union staff seeking to gain a deeper knowledge of online banking. **It’s Me 247** online help includes a section of frequently asked questions about **It’s Me 247** as well as tips for completing various tasks within online banking such as opening a new account, personalizing online banking pages, and adding security features to online banking. Visit itsme247.com/help/homebankhelp.htm to access this resource.

Show Me the Steps

This how-to help system provides simple step-by-step instructions to help clients complete various tasks in CU*BASE. It also includes an extensive video library with close to 200 video tutorials for those who learn best by seeing the software in action. Access this resource at help.cubase.org/steps/steps.htm.

CU*BASE Operator Edition Online Help

This online help system includes information about system-configuration screens as well as many of the daily-processing tools within CU*BASE Operator Edition. This helps CU*Answers self-processing credit union partners learn more about tools used by their operators and also helps all credit unions better understand the system configurations that control their daily operations. Access this resource at help.cubase.org/oper/oper.htm.

Videos

As part of the CU*Answers Presence over Video (POV) initiative, which aims to improve client communication and training through video, CU*Answers has developed an extensive library of video resources, which are outlined on the following page.

Cybersecurity Literacy for Credit Union Directors *NEW!*

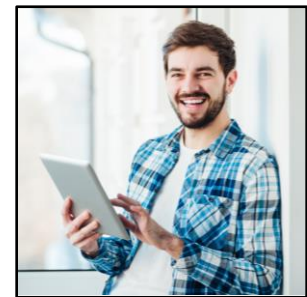
CU*Answers knows cybersecurity adds to an already heavy burden on credit union directors. Watch this comprehensive video, also available in DVD format, to learn about core concepts related to cybersecurity. The video even includes a test to assess your knowledge. Access this resource at cuanswers.com/resources/cybersecurity/cybersecurity-literacy-for-credit-union-directors.

Financial Literacy Series for Credit Union Board Directors

This series of 12 videos, also available in DVD format, is geared toward those new to the role of credit union board director. It even includes tests for participants to assess what they've learned. Access this resource at finlit.cuanswers.com.

"It's Me 247" How-To Video Series

Although this video series is designed for members, it's an excellent resource for new staff unfamiliar with **It's Me 247** Online Banking and the various online bill pay options that CU*Answers offers. The videos explain how to perform tasks in online banking and online bill pay. Access this resource at ondemand.cuanswers.com/channel/member-marketing.



OnDemand

Providing access to over 100 videos, the CU*Answers OnDemand site includes CU*BASE training videos, release training webinar recordings, and more! Access this resource at ondemand.cuanswers.com.



Show Me the Steps Video Tutorials

A how-to companion to CU*BASE GOLD online help, Show Me the Steps offers close to 200 video tutorials that show viewers the ins and outs of CU*BASE GOLD. Some of the videos are even interactive so viewers can practice what they learn. Visit help.cubase.org/steps/steps.htm#Video_Tutorials.htm to access this resource.

Virtual Training

For those who enjoy the flexibility of online training but value the interaction they get from in-person training, CU*Answers University offers virtual training. This type of training allows credit union staff to participate from the comfort of their own desk while still being able to interact with an instructor and course participants in real time. Following are details about CU*Answers virtual training options.


Webcast Classroom Training

Held in person at the CU*Answers University main training site in Grand Rapids, Michigan, and remotely via webcast, this course format involves broadcasting a classroom session over the Internet to allow participants at remote sites to watch the classroom session as it's happening in real time. For a full list of webcast classroom sessions, see the course schedules starting on page 27 and look for the video camera  symbol. Some of these webcast classroom training sessions have an on-demand equivalent, indicated by the 24-hour clock  symbol. For registration procedures, see page 3.

Webinars

Whether out of state or around the block, clients can attend CU*Answers University webinars for free, and without the cost of travel, making this a very cost-effective option. Webinars are a great choice for those who prefer a virtual learning environment that involves some level of interaction with the instructor and other participants. Depending on the webinar, interactivity may include a chat feature, question/answer session, virtual white board, and the ability to speak with the instructor and other



participants via the phone/computer. For a complete list of pre-scheduled webinars, see the course schedules starting on page 27 and look for the computer  symbol. For registration procedures, see page 3.

In addition to offering pre-scheduled webinars, CU*Answers offers webinars scheduled throughout the year. Listed on the following pages are details on some of the most popular CU*Answers webinar series that are scheduled throughout the year. For registration procedures, see page 3 or watch for an email invitation, which will be sent to all those on the CU*Answers Client News email distribution list. To be added to this list, contact the CU*Answers Writing Team at clientnews@cuanswers.com.

Analytics Booth Webinar Series *NEW!*

This weekly webinar series, which typically comprises eight webinar sessions, helps participants explore ways to get the most out of Analytics Booth, a tool that helps credit union executives mine, track, analyze, and report information anytime, anywhere. As part of this series, participants will learn how Analytics Booth can help them stay on top of their budgeting calculations, Tiered Service scores, certificate maturity, balance trends, and more!

CU*BASE Budgeting Tools Webinar Series

The CU*BASE Budgeting Tools webinar series, which typically comprises five webinar sessions, offers participants a deep dive into CU*BASE budgeting software, showing them how to get the most out of this robust toolset. During the webinar series, participants will learn how to prepare their general ledger chart of accounts as well as how to configure the budget toolset, research for calculation assumptions, use classical budget calculations and modeling tools, and analyze the budget against actual performance. The webinar series also provides participants an inside look at the latest features and those in development for the CU*BASE budgeting toolset.

Education Express

Held monthly, the brief 15- to 30-minute Education Express webinar focuses on upcoming training events, software upgrades, and more. This webinar series also serves as a refresher for CU*BASE tools clients may have forgotten about. Additionally, participants have the opportunity to learn about CU*Answers documentation, including AnswerBook, CU*BASE online help, and other resources that help clients make the most of the CU*BASE toolset.

Executive Study Groups

When it comes to credit union operations, it’s not what you expect, it’s what you inspect. That is, even if you expect your business to grow, if you don’t inspect performance and future opportunities, your business may not grow to expectations. Executive Study Groups are designed to show participants how to maximize credit union performance through analyzing current operations and opportunities to expand. Listed below are Executive Study Groups offered in 2018.



Active Beta Focus Group

As a cooperative, CU*Answers seeks to involve its client-owners in all of its operations, and nowhere is client input more valuable than in the development of new software. Designed for CEOs and leadership staff, the Active Beta Focus Group aims to tap into the wealth of experience that credit unions have on their teams with the ultimate goal of turning CU*BASE tools into valuable workhorses that credit union teams will want to use every day.

Build Your Best Lending Year Yet

This multi-week learning experience geared towards credit union management and lending leaders focuses on maximizing current loan offerings and building a better lending portfolio for the future. Whether you attend one session or every session, this series will show you how to use CU*BASE lending tools to build your best lending year yet!

Dashboard Dives

CU*BASE dashboards have compiled the numbers; join this webinar series to figure out how to use them to steer your credit union to success. Designed for CEOs and leadership staff, the Dashboard Dives typically comprises ten webinars and gives participants the chance to discuss what the data in CU*BASE dashboards really means and brainstorm how to use it to create a winning business plan.

Get Connected *NEW!*

This monthly webinar series focuses on CU*Answers Management Services and the people who drive them. These brief 30-minute sessions will introduce participants to CU*Answers Management Services and the value each service brings. Sessions will also include a discussion of what’s hot in the industry and help participants plug in to key resources within CU*BASE and the cuasterisk.com network.

Learning Café *NEW!*

Join these 1.5 hour monthly webinar sessions as you enjoy lunch at your desk! Sessions will include a discussion of hot topics in the credit union industry such as regulatory updates and compliance best practices. Also discussed will be new features in CU*BASE and topics based on client request.

Release Training

To help clients get up to speed on the latest CU*BASE tools and features, CU*Answers provides training for releases that include a significant number of software enhancements.

Tricks of the Trade

This monthly webinar series highlights key pieces of documentation that clients will find helpful. No registration is required for this drop-in webinar series. Simply watch for the monthly email invitation and click the link in the email to join the webinar. Learn about upcoming webinars by visiting cuanswers.com/resources/doc/tricks-of-the-trade-newsletter-series.

Simulated Training

Bedrock Community Credit Union

With the CU*Answers University simulated training environment, Bedrock Community Credit Union, clients can practice using CU*BASE without the worry of affecting real member data. To support realistic training, the operating software uses a library that is set up similar to an authentic credit union. To request credentials to access Bedrock, contact the CU*Answers Client Services & Education team at education@cuanswers.com. Visit cuanswers.com/resources/edu/simulated-training-environment to learn more about this resource.

CU*BASE Custom Training Edition

Unlike Bedrock Community Credit Union, which is used by all CU*Answers online clients, CU*BASE Custom Training Edition (CTE) is a training environment used exclusively by the subscribing credit union. CU*BASE CTE is customized to mirror the subscribing credit union's live environment without the worry



of affecting live member data. To request a quote, contact the CU*Answers Client Services & Education team at education@cuanswers.com. Visit cuanswers.com/resources/edu/customized-training-environment-cubase-cte to learn more about this resource.

Exercises for Success

Designed for use with CU*BASE simulated training environments, this workbook series offers users practical experience with common CU*BASE tasks and is a great way to reinforce training. Access this resource at cuanswers.com/resources/edu/simulated-training-environment.

Special Training Events

CU*Answers University offers a variety of free training events to provide credit union staff the opportunity to discuss industry hot topics with their peers in the cuasterisk.com network. Training event details are listed on the following pages. Note: Events are listed in Eastern Time. Training event dates and times are subject to change. For finalized event details, please watch for an email invitation, which will be sent to all those on the CU*Answers Client News email distribution list. To be added to this list, contact the CU*Answers Writing Team at clientnews@cuanswers.com.

Special Training Events at a Glance

Listed below are dates for all special training events. Event details can be found on the following pages.

| Date | Event | See Page |
|-------------------|--|----------|
| February 5 – 9 | University Week – Winter Session | 26 |
| February 13 | Collections Roundtable – Winter Session | 18 |
| February 5 – 9 | Sales & Marketing Week – Winter Session | 25 |
| March 5 – 9 | Asterisk Intelligence Week – Spring Session | 15 |
| March 14 | Mid-Year CEO School: Not Just for CEOs | 23 |
| March 21 | CFO Strategies Roundtable & Accounting Top Ten Focus Group | 18 |
| April 16 – 20 | University Week – Spring Session | 26 |
| May 7 – 11 | Lender*VP Week – Spring Session | 23 |
| May 16 | Conversations on Compliance | 20 |
| May 17 | Collections Roundtable – Spring Session | 18 |
| June 26 – 28 | Leadership Conference & Accompanying Events | 21 |
| July 16 – 20 | University Week – Summer Session | 26 |
| August 6 – 10 | Sales & Marketing Week – Summer Session | 25 |
| August 14 | Collections Roundtable – Summer Session | 18 |
| September 10 – 14 | Asterisk Intelligence Week – Fall Session | 15 |
| October 22 – 26 | Lender*VP Week – Fall Session | 23 |
| November 6 – 8 | CEO Strategies | 17 |
| November 14 | Collections Roundtable – Fall Session | 18 |
| December 3 – 7 | University Week – Fall Session | 26 |
| To be announced | “What Makes Data Valuable” Executive Boot Camp | 20 |
| To be announced | “Building Solutions as a Co-Op” Executive Boot Camp | 21 |
| To be announced | “Developers Help Desk” Executive Boot Camp | 21 |
| To be announced | Network Services IT Boot Camp – Spring Session | 24 |
| To be announced | Network Services IT Boot Camp – Fall Session | 24 |

Asterisk Intelligence Week *NEW!*

Hosted by the CU*Answers Asterisk Intelligence team, the events held during this week provide clients with data-analytics and data-warehousing solutions. Following are the events held during this week.

Events

Dashboards Up Close & Personal

During this two-day training event designed for credit union management, marketing staff, and database administrators, participants will get up close and personal with CU*BASE dashboards and learn how to use them to gain key insights about their credit union’s current performance and future direction. This intensive training session will give participants a comprehensive look at all dashboards within CU*BASE and the value that each dashboard can bring them and their board.

Report Builder from Beginning to End

Designed for credit union management, marketing staff, and database administrators, this two-day training event will help participants become expert users of the CU*BASE Report Builder tool. Participants will learn how Queries are created and the value they have in analyzing member data. This training event will cover everything from database file structure to multiple file Queries.

For credit unions wishing to work on their own Query projects under the guidance of CU*Answers Query experts, this event will also be held by request. In this case, there will be special technical requirements as each participant will need a connection to CU*BASE. To request that this event be held exclusively for your credit union or to inquire about technical requirements, contact the CU*Answers Asterisk Intelligence team at ai@cuanswers.com.

Asterisk Intelligence Courses

The following courses will be offered during this week:

- 16.00 Data Warehouse Strategies
- 16.01 Educating Your Board with Data
- 16.02 Introduction to Analytics Booth
- 16.03 Analytics Booth Alerts
- 16.04 Audience Considerations for Analytics Booth
- 16.05 Security Considerations for Analytics Booth



Dates

- Spring Session: March 5 – 9
- Fall Session: September 10 – 14

Location

This event will be held at the CU*Answers corporate office: 6000 28th St. SE, Grand Rapids, MI.

Registration

There is separate registration for each session included in this event. For registration details, please watch for an email invitation, which will be sent to all those on the CU*Answers Client News email distribution list. Contact the CU*Answers Writing Team at clientnews@cuanswers.com to be added to this list.

Schedule

| Day | Event |
|--------------------|--------------------------------------|
| Monday/Tuesday | Dashboards Up Close & Personal |
| Wednesday/Thursday | Report Builder from Beginning to End |
| Friday | Asterisk Intelligence Courses |

CEO Strategies

Designed for credit union CEOs, this event packs three days of learning into a framework of idea sharing, collaboration, and networking. CEO Strategies comprises three separate events: CEO Collaboration in the cuasterisk.com Network, CEO School, and CEO Roundtable. Each event is detailed below.

Events

CEO Collaboration in the cuasterisk.com Network

Kicking off CEO Strategies is a half-day workshop, during which CEOs brainstorm about hot topics such as profitability analysis, expanding their credit union’s opportunities, and starting a business in the cuasterisk.com network. A networking session will follow in the evening.

CEO School: Driving Solutions and Execution

The day-long CEO School gives participants the chance to hear CU*Answers CEO Randy Karnes discuss how he would use CU*BASE tools as a credit union CEO to interact with leadership and board members. A networking session will follow in the evening.

CEO Roundtable

Rounding out the week’s events is the CEO Roundtable, which gives CEOs a unique opportunity to address topics and concerns with their peers in the cuasterisk.com network. Participants join in frank discussions about their shared challenges as CEOs and explore the potential for developing new partnerships over the coming year.

Dates

November 6 – 8

Location

This event will be held at the Watermark Country Club, located at 5500 Cascade Rd. SE, Grand Rapids, MI 49546.



Registration

There is separate registration for each session included in this event. For registration details, please watch for an email invitation, which will be sent to all those on the CU*Answers Client News email distribution list. Contact the CU*Answers Writing Team at clientnews@cuanswers.com to be added to this list.

Schedule

| Date | Time | Event |
|------------|----------------|---|
| November 6 | 1 – 5 PM | CEO Collaboration in the cuasterisk.com Network |
| November 6 | 5:30 – 7:30 PM | CEO Strategies Open Networking Session |
| November 7 | 9 AM – 4:30 PM | CEO School: Driving Solutions and Execution |
| November 7 | 5:30 – 7:30 PM | “Thinking 2019” Networking Session |
| November 8 | 9 AM – 3 PM | CEO Roundtable |

CFO Strategies Roundtable & Accounting Top Ten

Combined into one day-long learning opportunity for credit union CFOs and accounting leadership, these two events offer participants the opportunity to learn about the driving forces behind CU*BASE development and collaborate with their peers to envision new tools and network solutions.

Events

CFO Strategies Roundtable

Network with your industry peers! Join other finance leaders and discuss the tools and network solutions available to CFOs, and learn more about what drives development here at CU*Answers. This roundtable is open to CFOs and accounting leadership.



Accounting Top Ten Focus Group

Collaboration feeds innovation, and as a CUSO, CU*Answers thrives when clients are involved in the development of our products and services. We encourage accounting leaders from your credit union to join the discussion, and work with CU*Answers leadership to help shape our accounting tools and strategies.

Date

March 21

Location

This event will be held at the CU*Answers corporate office: 6000 28th St. SE, Grand Rapids, MI.

Registration

There is separate registration for each session included in this event. Please follow the links below to register for individual sessions.

- CFO Strategies Roundtable: cuanswers.com/resources/edu/courses/syllabi/?course=SE.18.1
- Accounting Top Ten Focus Group: cuanswers.com/resources/edu/courses/syllabi/?course=SE.18

Schedule

| Time | Event |
|--------------|--------------------------------|
| 9 AM – 12 PM | CFO Strategies Roundtable |
| 12 – 1 PM | Lunch (courtesy of CU*Answers) |
| 1 – 4 PM | Accounting Top Ten Focus Group |

Collections Roundtable

The Collections Roundtable and Roundtable Recap keep clients in the know on collections-related happenings as they relate to the credit union industry.

Events

Collections Roundtable

The quarterly Collections Roundtable offers collections staff the opportunity to discuss collections best practices with their peers. Often there are guest speakers who are experts in collections-related issues.

Roundtable Recap

Geared toward those who are unable to attend the Collections Roundtable, this webinar provides a brief summary of hot topics that were discussed at the most recent Roundtable event.



Dates

- Collections Roundtable – Winter Session: February 13
 - Roundtable Recap webinar to be held on February 27 at 2 PM
- Collections Roundtable – Spring Session: May 17
 - Roundtable Recap webinar to be held on May 31 at 3 PM
- Collections Roundtable – Summer Session: August 14
 - Roundtable Recap webinar to be held on August 28 at 4 PM
- Collections Roundtable – Fall Session: November 14
 - Roundtable Recap webinar to be held on November 28 at 3 PM

Location

The Collections Roundtable is held at the CU*Answers corporate office: 6000 28th St. SE, Grand Rapids, MI. This event is also hosted via live webcast for those who would like to participate remotely. The Roundtable Recap is offered via webinar.

Registration

There is separate registration for each session included in this event. Please follow the instructions below to register for individual sessions.

- Collections Roundtable: Please register at cuanswers.com/education/syllabi/?course=SE.51.
- Roundtable Recap webinar: Registration is not required for this webinar. You can join this drop-in webinar via the link in the email invitation, which will be sent to all those on the CU*Answers Client News email distribution list.

Schedule

Below is the schedule for the Collections Roundtable, which includes two identical sessions to accommodate participants with busy schedules.

| Time | Event |
|-----------------|---|
| 9:30 AM – 12 PM | Open Discussion of Collections-Related Topics |
| 1:30 – 4 PM | Open Discussion of Collections-Related Topics |

Conversations on Compliance

This annual seminar offers participants a panel discussion from compliance professionals and renowned industry experts. While the event agenda changes each year based on current hot topics related to compliance, popular areas of focus during this event include compliance and regulatory updates as well as cybersecurity.

Date

May 16

Location

This event will be held at the CU*Answers corporate office: 6000 28th St. SE, Grand Rapids, MI.

Registration

Visit cuanswers.com/resources/edu/courses/syllabi/?course=SE.7 to register for this event.

Schedule

| Time | Event |
|------------------|-----------------------------------|
| 9 – 10:30 AM | 7 Steps to Reduce UDAAP Risks |
| 10:45 AM – 12 PM | A Regulatory Update: What’s Ahead |
| 12 – 1 PM | Lunch Provided |
| 1 – 3:30 PM | ACH Data Security |

Executive Boot Camps

Covering subject matter at a much deeper level than most CU*Answers training events, Executive Boot Camps give credit union executives hands-on experience in owning and crafting solutions. Executive Boot Camps allow participants to not only have a voice in the solutions CU*Answers offers, but also to be intimately involved in how CU*Answers designs, builds, and supports those solutions. If at the end of an Executive Boot Camp event, participants feel connected to the process and a sense of responsibility



to the overall success of CU*Answers as a CUSO, beyond what they might get out of it as a customer, then the most important goal of the Executive Boot Camp has been accomplished: to engage participants as owners. Learn more at cuanswers.com/events/boot-camps.

Boot Camp Sessions

What Makes Data Valuable

Over the course of a year, a select group of 12 participants will spend a total of eight days working with CUSO insiders to harvest ideas on building a data warehouse community and cultivating talents for gaining insights from data throughout the network.

Building Solutions as a Co-Op

Over the course of a year, a select group of 12 participants will spend a total of eight days getting an insider’s look at the prioritization models and collaborative processes that turn ideas into technical solutions for our network.

Developers Help Desk (DHD) NEW!

Six people will be nominated for two sessions of intensive work directly with CU*Answers developers on specific projects such as using APIs for mobile features or website features, setting up third-party integrations, or other DIY projects.



Dates

For the “What Makes Data Valuable” and “Building Solutions as a Co-Op” Executive Boot Camp programs, dates are typically announced at the CU*BASE Leadership Conference in June, with an application period that ends in September when participants are selected. Participants then meet quarterly, with the first two-day meeting held in November or December. The new “Developers Help Desk” Boot Camp program will offer participants two sessions of collaboration with CU*Answers developers: one in May and one in November. Visit cuanswers.com/events/boot-camps for specific dates and application procedures.

Location

All events will be held at the CU*Answers corporate office: 6000 28th St. SE, Grand Rapids, MI. Accommodations will be provided, courtesy of CU*Answers.

Registration

No registration is necessary for specific Boot Camp events. The applicants selected to participate in the Executive Boot Camp will be notified via email of event and accommodation details.

Leadership Conference & Accompanying Events

The annual CU*Answers Leadership Conference and accompanying events welcome staff from credit unions across the country. Join other CU*BASE clients to celebrate achievements and plan for even greater successes in the future. Learn more at cuanswers.com/events/lc.

Events

Xtend Early Bird Special Event

During this event, Xtend staff will share where they’ve been, where they are, and where they’re headed in their effort to help credit unions effectively serve their members.

Xtend Stockholder Meeting

Geared toward CEOs and board chairs of Xtend owners, this meeting gives attendees a chance to hear the latest on the CUSO’s performance over the past year and look ahead to the coming year. The official Xtend Board election will also take place during this meeting.

Cocktail Reception, sponsored by cuasterisk.com

Welcoming all those attending the CU*Answers Leadership Conference and accompanying events, the Cocktail Reception is a time for participants to network with their peers in a fun, relaxed environment.



*CU*Answers Leadership Conference*

Designed for CEOs and senior credit union leaders, the Leadership Conference provides a unique opportunity to network with peers, take a look at recent accomplishments and look ahead toward what CU*Answers has in store for the coming year.

*CU*Answers Stockholder Meeting*

Geared toward CEOs and board chairs of CU*Answers owners, this meeting will give participants an inside look at the CUSO’s performance over the past year and look ahead to the coming year. CU*Answers CEO Randy Karnes will also provide a quick report to owners. The official CU*Answers Board election will also take place during this meeting.

*CU*Answers Golf Outing*

Topping off the week’s events, this fun-filled golf scramble is a time for participants of the CU*Answers Leadership Conference and accompanying events to network with their peers while they enjoy a round of golf, a pig roast, and an awards ceremony.

Dates

June 26 – 28

Location

The CU*Answers Leadership Conference and accompanying events will be held at various locations in and around the Grand Rapids area. For details, please watch for an email invitation, which will be sent to all those on the CU*Answers Client News email distribution list. Contact the CU*Answers Writing Team at clientnews@cuanswers.com to be added to this list.

Registration

There is separate registration for each session included in this event. For registration details, please watch for an email invitation.

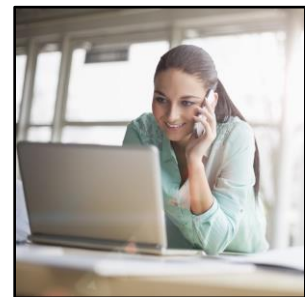
Schedule

| Date | Time | Event | Location |
|---------|-------------------|--|-------------------------|
| June 26 | 2 – 3:30 PM | Xtend Early Bird Special Event NEW! | JW Marriott Hotel |
| June 26 | 4 – 4:30 PM | Xtend Stockholder Meeting | JW Marriott Hotel |
| June 26 | 4:30 – 7:30 PM | Cocktail Reception, <i>sponsored by cuasterisk.com</i> | JW Marriott Hotel |
| June 27 | 9 AM – 4:30 PM | CU*Answers Leadership Conference | Devos Convention Center |
| June 27 | 6:30 – 9 PM | CU*Answers Stockholder Meeting | JW Marriott Hotel |
| June 28 | 8:30 AM – 4:30 PM | CU*Answers Golf Outing | Saskatoon Golf Course |

Lender*VP Week

Held twice a year, Lender*VP Week condenses all CU*Answers lending courses into one week for those who would like to hone their lending skills and learn about the latest lending tools. Courses include:

- 5.00 Designing CU*BASE Loan Products
- 5.10 Lending from Request to Disbursement: Understanding the Application Process
- 5.11 CU*BASE Mortgage Processing
- 5.12 CU*BASE Escrow Processing
- 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
- 5.75 Implementing the 247 Lender Decision Model
- 5.76 Managing Delivery Channels
- 5.79 Real Estate Solutions
- 5.81 Introduction to the Loan Fulfillment Center by Accenture
- 5.85 Participation Loan Servicing: Understanding the Settlement Process
- 5.86 Secondary-Market Loan Servicing: Understanding the Settlement Process



Dates

Following are the dates of each Lender*VP Week to be held in 2018:

- Spring session: May 7 – 11
- Fall session: October 22 – 26

Location

Lender*VP Week courses will be held in person at the CU*Answers corporate office: 6000 28th St. SE, Grand Rapids, MI. Courses will also be hosted via live webcast for remote participants.

Registration

To register for individual courses during Lender*VP week, visit cuanswers.com/resources/edu/courses.

Schedule

To view the dates/times of courses offered during Lender*VP Week, refer to the Course Schedule by Date beginning on page 27.

Mid-Year CEO School: Not Just for CEOs

During this day-long training event, which welcomes all credit union staff, CU*Answers Asterisk Intelligence Vice President Keegan Daniel and his team of experts will share insights into what credit union executives need to understand about data. Participants will examine CU*BASE dashboards and statistical-analysis tools that can help them identify new opportunities and achieve strategic goals.

Date

March 14

Location

This event will be held at the CU*Answers corporate office: 6000 28th St. SE, Grand Rapids, MI.

Registration

Visit cuanswers.com/resources/edu/courses/syllabi/?course=SE.2 to register for Mid-Year CEO School.

Schedule

| Time | Event |
|--------------|--------------------------------------|
| 9 AM – 12 PM | Morning Training Session |
| 12 – 1 PM | Lunch (courtesy of CU*Answers) |
| 1 – 4 PM | Afternoon Training Session, Open Q&A |

Network Services IT Boot Camp

Offered biannually, this two-day event provides credit union IT staff an in-depth knowledge of CU*BASE and ProDOC installation and troubleshooting with an aim to achieve tighter integration between credit union IT staff and the CU*Answers Network Services team. Learn more about this event by visiting cuanswers.com/events/boot-camps.



Dates

The Network Services IT Boot Camp is held twice a year in the spring and fall. For specific dates and other details, visit cuanswers.com/events/boot-camps.

Location

The Network Services IT Boot Camp is held at the CU*Answers corporate office: 6000 28th St. SE, Grand Rapids, MI.

Registration

Visit cuanswers.com/events/boot-camps to register for this event. (Registration limited to 30)

Schedule

| Day | Time | Event |
|-------|---------------------|--|
| Day 1 | 8 – 11:30 AM | CU*BASE Installation and Troubleshooting |
| Day 1 | 11:30 AM – 12:30 PM | Lunch (courtesy of CU*Answers) |
| Day 1 | 12:30 – 5 PM | ProDOC Installation/Troubleshooting, Security Part I |
| Day 2 | 8 – 11:30 AM | WAN Overview, Security Part II |
| Day 2 | 11:30 AM – 12:30 PM | Lunch (courtesy of CU*Answers) |
| Day 2 | 12:30 – 5 PM | RMM Platform, Reports, and Hardware |

Sales & Marketing Week

The biannual Sales & Marketing Week allows credit union staff to network with other sales and marketing staff in the cuasterisk.com network and learn about the latest sales and marketing tools.

Events

Sales & Marketing Roundtable

This event offers participants tips and best practices on CU*BASE sales and marketing tools as well as the opportunity to network with other sales and marketing staff within the cuasterisk.com network.

Sales & Marketing Courses

In addition to the Sales & Marketing Roundtable, the following courses will be offered during this week:

- 4.10 Introduction to CU*BASE Marketing & Sales Tools
- 4.12 Member Connect: Building a Communication Network within CU*BASE
- 4.13 Cross Sales & Sales Trackers: Offering Members Relevant Opportunities
- 4.15 Member Service Trackers, Leads, and Follow-Ups
- 4.20 Report Builder 1: Working with Computer-Stored Data for Reports and Inquiries
- 4.40 CU*Statements
- 4.21 Report Builder 2: Building Custom Reports
- 4.22 Report Builder 3: Database Files & String Reports
- 4.90 Introduction to WordPress with SiteControl
- 4.91 Advanced WordPress with SiteControl
- 4.94 Making a Splash with Member Statements
- 4.95 Next Suggested Product – Targeted Sales Prompts



Dates

- Winter session: February 5 – 9
- Summer session: August 6 – 10

Location

The Sales & Marketing Roundtable and the sales/marketing courses will be held at the CU*Answers corporate office: 6000 28th St. SE, Grand Rapids, MI, as well as via live webcast for remote participants.

Registration

Please follow the instructions below to register for individual events during Sales & Marketing Week:

- Sales & Marketing Roundtable: For registration details, please watch for an email invitation, which will be sent to all those on the CU*Answers Client News email distribution list. To be added to this list, contact the CU*Answers Writing Team at clientnews@cuanswers.com.
- Sales/marketing courses: Register for courses at cuanswers.com/resources/edu/courses.

Schedule

Sales & Marketing Roundtable

| Time | Event |
|-----------------|--|
| 9 – 9:30 AM | Breakfast (courtesy of Xtend) |
| 9:30 AM – 12 PM | Credit Union Sales and Marketing Best Practices |
| 12 – 1:30 PM | Lunch (on your own) |
| 1:30 – 3 PM | Improving Your Sales & Marketing Strategy with CU*BASE |

Sales & Marketing Courses

For dates and times of individual courses, refer to the Course Schedule by Date beginning on page 27.

University Week

Held once per quarter, University Week includes the most timely and relevant courses, all condensed into one week.

Dates

Listed below are the dates of each University Week to be held in 2018.

- Winter Session: February 5 – 9
- Spring Session: April 16 – 20
- Summer Session: July 16 – 20
- Fall Session: December 3 – 7

Location

In-person courses will be held at the CU*Answers corporate office: 6000 28th St. SE, Grand Rapids, MI.



Registration

There is separate registration for each course offered during this week. To register for individual courses, visit cuanswers.com/resources/edu/university-weeks.

Schedule







To view the list of courses offered as part of a University Week, refer to the Course Schedule by Date beginning on page 27.

Course Schedule by Date

In this section is a list of all CU*Answers University courses listed in date order. To register for any of the courses listed here, visit cuanswers.com/resources/edu/courses.

Symbols

Below is a key to the symbols used in this schedule.

| | | | | | |
|---|---|---|---|---|---|
| Webinar Format | Classroom Format | Classroom / Webcast | Available On Demand | Workshop Available | New / Revised |
|  |  |  |  |  |  |
| The course is offered via webinar. See page 12 for details. | The course is offered in person. See page 5 for details. | The course is offered both in person and via webcast. See page 11 for details. | The course has an on-demand equivalent. See page 9 for details. | A workshop can be requested for the course. See page 5 for details. | The course is new or the content has been revised. |

Schedule

Course Schedule by Date

■ University Week
 ■ Sales & Marketing Week
 ■ Asterisk Intelligence Week
 ■ Lender*VP Week

| Number | Name | Date | Time (Eastern) | Webinar Format | Classroom Format | Classroom / Webcast | Available On Demand | Workshop Available | New / Revised |
|----------------|--|--------|----------------|---|---|---------------------|---------------------|--------------------|---|
| January | | | | | | | | | |
| 2.00 | CU*BASE Employee Security | Th 1/4 | 11 AM – 12 PM |  | | | | | |
| 8.00 | Managing Compliance Using CU*BASE | M 1/8 | 3 – 4 PM | |  | | | |  |
| 8.02 | Using CU*BASE Tools for Bank Secrecy Act (BSA) Compliance | W 1/10 | 2 – 3 PM |  | | | | | |
| 8.06 | Understanding Credit Union Liability for Security Breaches | F 1/12 | 1 – 2 PM |  | | | | | |
| 8.07 | Monitoring Abnormal Activity | M 1/15 | 2 – 3 PM |  | | | | | |
| 8.08 | Internal Controls Best Practices | W 1/17 | 1 – 2 PM |  | | | | | |

Course Schedule by Date

■ University Week
 ■ Sales & Marketing Week
 ■ Asterisk Intelligence Week
 ■ Lender*VP Week

| Number | Name | Date | Time (Eastern) | Webinar Format | Classroom Format | Classroom / Webcast | Available On Demand | Workshop Available | New / Revised |
|-----------------|---|---------|------------------|----------------|------------------|---------------------|---------------------|--------------------|---------------|
| 8.09 | Vendor Management 101 | F 1/19 | 11 AM – 12 PM | | | | | | |
| 9.55 | Social Engineering: The Human Side of Security | T 1/23 | 3 – 4 PM | | | | | | |
| 9.65 | Business Continuity Planning | Th 1/25 | 1 – 2 PM | | | | | | |
| 9.70 | Incident Response and Recovery Testing | T 1/30 | 2 – 3 PM | | | | | | |
| February | | | | | | | | | |
| 14.00 | An Overview of Records and Information Management | M 2/5 | 9 – 9:30 AM | | | | | | ★ |
| 14.01 | Email Overload – How to Manage It | M 2/5 | 10 – 10:30 AM | | | | | | ★ |
| 15.01 | Providing First-Class Customer Service to Members | M 2/5 | 11 AM – 12 PM | | | | | | ★ |
| 15.02 | Interviewing Skills with a Credit Union Slant | M 2/5 | 2 – 3 PM | | | | | | ★ |
| 15.00 | Microsoft Excel for Credit Unions | M 2/5 | 3:30 – 4:30 PM | | | | | | ★ |
| 15.03 | Leadership Essentials for New Supervisors | T 2/6 | 9 – 10 AM | | | | | | ★ |
| 15.04 | The Art of Coaching | T 2/6 | 10:30 – 11:30 AM | | | | | | ★ |
| 11.02 | eSignature Basics | T 2/6 | 1 – 2 PM | | | | | | ★ |
| 11.03 | Introduction to My Virtual StrongBox | T 2/6 | 2:30 – 3:30 PM | | | | | | ★ |
| 11.04 | Introduction to the Enhanced Online Vault | T 2/6 | 4 – 5 PM | | | | | | ★ |
| 12.00 | Standard ATM/Debit Card Platform | W 2/7 | 9 – 10 AM | | | | | | |
| 12.01 | Online Credit Cards: Loan Creation and Card Embossing | W 2/7 | 10:30 – 11:15 AM | | | | | | |
| 12.02 | Online Credit Cards: Daily Maintenance/ Reports | W 2/7 | 1:30 – 2:30 PM | | | | | | |

University Week

Course Schedule by Date

■ University Week
 ■ Sales & Marketing Week
 ■ Asterisk Intelligence Week
 ■ Lender*VP Week

| Number | Name | Date | Time (Eastern) | Webinar Format | Classroom Format | Classroom / Webcast | Available On Demand | Workshop Available | New / Revised |
|--------|---|---------|------------------|----------------|------------------|---------------------|---------------------|--------------------|---------------|
| 12.03 | Online Credit Cards: On the Front Line | W 2/7 | 3 – 4 PM | | | | | | |
| 1.01 | Member Services: Account Inquiry and Phone Operator | Th 2/8 | 9:30 – 11 AM | | | | | | |
| 1.20 | Teller Techniques and Shared-Branching Options | Th 2/8 | 1 – 2:30 PM | | | | | | |
| 1.30 | Head Teller Vault/Change Fund Management | Th 2/8 | 3 – 4 PM | | | | | | |
| 13.01 | Shopping the IRSC Online Store | F 2/9 | 9 – 10 AM | | | | | | |
| 13.02 | MAP/MOP – Applying for Membership Online | F 2/9 | 10:30 – 11:30 AM | | | | | | |
| 13.03 | Launching Your FREE CU*Answers Mobile App | F 2/9 | 1:30 – 2:30 PM | | | | | | |
| 13.04 | Deploying Your Mobile Experience Center (MXC) | F 2/9 | 3 – 3:30 PM | | | | | | ★ |
| 4.10 | Introduction to CU*BASE Marketing & Sales Tools | W 2/21 | 9 – 10 AM | | | | | | |
| 4.12 | Member Connect: Building a Communication Network within CU*BASE | W 2/21 | 10:30 – 11:30 AM | | | | | | |
| 4.13 | Cross Sales & Sales Trackers: Offering Members Relevant Opportunities | W 2/21 | 1:30 – 3 PM | | | | | | |
| 4.15 | Member Service Trackers, Leads, and Follow-Ups | W 2/21 | 3:30 – 4:30 PM | | | | | | |
| 4.20 | Report Builder 1: Working with Computer-Stored Data for Reports and Inquiries | Th 2/22 | 9 – 10:30 AM | | | | | | |
| 4.40 | CU*Statements | Th 2/22 | 11 AM – 12 PM | | | | | | |
| 4.21 | Report Builder 2: Building Custom Reports | Th 2/22 | 1:30 – 3 PM | | | | | | |
| 4.22 | Report Builder 3: Database Files & String Reports | Th 2/22 | 3:30 – 5 PM | | | | | | |
| 4.90 | Introduction to WordPress with SiteControl | F 2/23 | 9 – 10 AM | | | | | | |
| 4.91 | Advanced WordPress with SiteControl | F 2/23 | 10:30 – 11:30 AM | | | | | | |

Sales & Marketing Week

Course Schedule by Date

■ University Week
 ■ Sales & Marketing Week
 ■ Asterisk Intelligence Week
 ■ Lender*VP Week

| Number | Name | Date | Time (Eastern) | Webinar Format | Classroom Format | Classroom / Webcast | Available On Demand | Workshop Available | New / Revised | | | | | | | | | |
|--|---|---------|----------------|----------------|------------------|---------------------|---------------------|--------------------|---------------|-------|---|--------|------------------|--|--|--|--|---|
| 4.94 | Making a Splash with Member Statements | F 2/23 | 1:30 – 2:30 PM | | | | | | | | | | | | | | | |
| 4.95 | Next Suggested Product – Targeted Sales Prompts | F 2/23 | 3 – 4:30 PM | | | | | | | | | | | | | | | |
| March | | | | | | | | | | | | | | | | | | |
| <div style="border: 1px solid white; padding: 5px; transform: rotate(-15deg); display: inline-block;"> Asterisk Intelligence Week </div> | | | | | | | | | | 16.02 | Introduction to Analytics Booth | F 3/9 | 9 – 10 AM | | | | | ★ |
| | | | | | | | | | | 16.03 | Analytics Booth Alerts | F 3/9 | 10:30 – 11 AM | | | | | ★ |
| | | | | | | | | | | 16.04 | Audience Considerations for Analytics Booth | F 3/9 | 11:30 AM – 12 PM | | | | | ★ |
| | | | | | | | | | | 16.05 | Security Considerations for Analytics Booth | F 3/9 | 1:30 – 2 PM | | | | | ★ |
| | | | | | | | | | | 16.00 | Data Warehouse Strategies | F 3/9 | 2:30 – 3:30 PM | | | | | ★ |
| | | | | | | | | | | 16.01 | Educating Your Board with Data | F 3/9 | 4 – 5 PM | | | | | ★ |
| | | | | | | | | | | 10.00 | Data Mining: “Know Your Member” Analysis Tools | T 3/27 | 2 – 3 PM | | | | | |
| 10.02 | Dividend Processing and Member Deposits | Th 3/29 | 11 AM – 12 PM | | | | | | | | | | | | | | | |
| April | | | | | | | | | | | | | | | | | | |
| <div style="border: 1px solid white; padding: 5px; transform: rotate(-15deg); display: inline-block;"> University Week </div> | | | | | | | | | | 14.00 | An Overview of Records and Information Management | M 4/16 | 9 – 9:30 AM | | | | | ★ |
| | | | | | | | | | | 14.01 | Email Overload – How to Manage It | M 4/16 | 10 – 10:30 AM | | | | | ★ |
| | | | | | | | | | | 15.01 | Providing First-Class Customer Service to Members | M 4/16 | 11 AM – 12 PM | | | | | ★ |
| | | | | | | | | | | 15.02 | Interviewing Skills with a Credit Union Slant | M 4/16 | 2 – 3 PM | | | | | ★ |
| | | | | | | | | | | 15.03 | Leadership Essentials for New Supervisors | T 4/17 | 9 – 10 AM | | | | | ★ |
| | | | | | | | | | | 15.04 | The Art of Coaching | T 4/17 | 10:30 – 11:30 AM | | | | | ★ |

Course Schedule by Date

■ University Week
 ■ Sales & Marketing Week
 ■ Asterisk Intelligence Week
 ■ Lender*VP Week

| Number | Name | Date | Time (Eastern) | Webinar Format | Classroom Format | Classroom / Webcast | Available On Demand | Workshop Available | New / Revised |
|--------|---|---------|------------------|----------------|------------------|---------------------|---------------------|--------------------|---------------|
| 15.00 | Microsoft Excel for Credit Unions | T 4/17 | 1:30 – 2:30 PM | | | | | | ★ |
| 16.00 | Data Warehouse Strategies | T 4/17 | 3 – 4 PM | | | | | | ★ |
| 16.01 | Educating Your Board with Data | W 4/18 | 9 – 10 AM | | | | | | ★ |
| 16.02 | Introduction to Analytics Booth | W 4/18 | 10:30 – 11:30 AM | | | | | | ★ |
| 16.03 | Analytics Booth Alerts | W 4/18 | 1:30 – 2 PM | | | | | | ★ |
| 16.04 | Audience Considerations for Analytics Booth | W 4/18 | 2:30 – 3 PM | | | | | | ★ |
| 16.05 | Security Considerations for Analytics Booth | W 4/18 | 3:30 – 4 PM | | | | | | ★ |
| 13.01 | Shopping the IRSC Online Store | Th 4/19 | 9 – 10 AM | | | | | | |
| 13.02 | MAP/MOP – Applying for Membership Online | Th 4/19 | 10:30 – 11:30 AM | | | | | | |
| 13.03 | Launching Your FREE CU*Answers Mobile App | Th 4/19 | 1:30 – 2:30 PM | | | | | | |
| 13.04 | Deploying Your Mobile Experience Center (MXC) | Th 4/19 | 3 – 3:30 PM | | | | | | ★ |
| 3.25 | SRS Bookkeeping Services – Sharing Our Policies and Procedures | F 4/20 | 9 – 10 AM | | | | | | |
| 3.26 | 5300 Tools: Call Report Techniques from Xtend SRS | F 4/20 | 10:30 AM – 12 PM | | | | | | |
| 3.40 | Credit Union Financials: Configuration, Printing, and Other Options | F 4/20 | 2 – 3:30 PM | | | | | | |
| May | | | | | | | | | |
| 5.00 | Designing CU*BASE Loan Products | M 5/7 | 9:30 – 11 AM | | | | | | |
| 5.10 | Lending from Request to Disbursement: Understanding the Application Process | M 5/7 | 1 – 2 PM | | | | | | |
| 5.11 | CU*BASE Mortgage Processing | M 5/7 | 2:30 – 4 PM | | | | | | |

Lender*VP Week

Course Schedule by Date

■ University Week
 ■ Sales & Marketing Week
 ■ Asterisk Intelligence Week
 ■ Lender*VP Week

| Number | Name | Date | Time (Eastern) | Webinar Format | Classroom Format | Classroom / Webcast | Available On Demand | Workshop Available | New / Revised |
|-------------|---|---------|----------------|----------------|------------------|---------------------|---------------------|--------------------|---------------|
| 5.12 | CU*BASE Escrow Processing | T 5/8 | 9:30 – 11 AM | | | | | | |
| 5.20 | Organizing a Loan Department and Servicing Loans on CU*BASE | T 5/8 | 1 – 2:30 PM | | | | | | |
| 5.30 | Open-End and Line-of-Credit Lending | T 5/8 | 3 – 4 PM | | | | | | |
| 5.40 | Managing Bankruptcy | W 5/9 | 9:30 – 11 AM | | | | | | |
| 5.50 | Interactive Online Collections | W 5/9 | 1 – 2:30 PM | | | | | | |
| 5.70 | Centralized Underwriting: Inquiry for Loans in Process | W 5/9 | 3 – 4 PM | | | | | | |
| 5.75 | Implementing the 247 Lender Decision Model | Th 5/10 | 10 – 11 AM | | | | | | |
| 5.76 | Managing Delivery Channels | Th 5/10 | 1 – 2 PM | | | | | | |
| 5.79 | Real Estate Solutions | Th 5/10 | 2:30 – 4 PM | | | | | | |
| 5.81 | Introduction to the Loan Fulfillment Center by Accenture | F 5/11 | 9:30 – 11 AM | | | | | | |
| 5.85 | Participation Loan Servicing: Understanding the Settlement Process | F 5/11 | 1 – 2 PM | | | | | | |
| 5.86 | Secondary-Market Loan Servicing: Understanding the Settlement Process | F 5/11 | 2:30 – 3:30 PM | | | | | | |
| June | | | | | | | | | |
| 1.01 | Member Services: Account Inquiry and Phone Operator | M 6/4 | 1:30 – 3 PM | | | | | | |
| 1.20 | Teller Techniques and Shared-Branching Options | W 6/6 | 1 – 2:30 PM | | | | | | |
| 1.30 | Head Teller Vault/Change Fund Management | F 6/8 | 11 AM – 12 PM | | | | | | |
| 3.15 | Advanced General Ledger | M 6/11 | 1 – 2:30 PM | | | | | | |
| 3.20 | Balancing Made Easy | T 6/12 | 11 AM – 12 PM | | | | | | |

Course Schedule by Date

■ University Week
 ■ Sales & Marketing Week
 ■ Asterisk Intelligence Week
 ■ Lender*VP Week

| Number | Name | Date | Time (Eastern) | Webinar Format | Classroom Format | Classroom / Webcast | Available On Demand | Workshop Available | New / Revised |
|-------------|---|---------|------------------|---|------------------|---|---|--------------------|---------------|
| 3.62 | Member Payroll and ACH Products | W 6/13 | 1:30 – 3 PM |  | | | | | |
| 3.71 | Understanding CU*BASE Transactions | Th 6/14 | 2 – 3 PM |  | | | | | |
| 10.00 | Data Mining: “Know Your Member” Analysis Tools | T 6/19 | 2 – 3 PM |  | | | | | |
| 10.02 | Dividend Processing and Member Deposits | W 6/20 | 11 AM – 12 PM |  | | | | | |
| 10.01 | Relationship Management: Clubs and Tiered Services Programs | Th 6/21 | 1:30 – 3 PM |  | | | | | |
| 10.03 | CU*BASE Management Tools: Leadership Dashboards | F 6/22 | 1 – 2:30 PM |  | | | | | |
| July | | | | | | | | | |
| 14.00 | An Overview of Records and Information Management | M 7/16 | 9 – 9:30 AM | | |  | | | ★ |
| 14.01 | Email Overload – How to Manage It | M 7/16 | 10 – 10:30 AM | | |  | | | ★ |
| 15.01 | Providing First-Class Customer Service to Members | M 7/16 | 11 AM – 12 PM | | |  | | | ★ |
| 15.02 | Interviewing Skills with a Credit Union Slant | M 7/16 | 2 – 3 PM | | |  | | | ★ |
| 15.00 | Microsoft Excel for Credit Unions | M 7/16 | 3:30 – 4:30 PM | | |  | | | ★ |
| 15.03 | Leadership Essentials for New Supervisors | T 7/17 | 9 – 10 AM | | |  | | | ★ |
| 15.04 | The Art of Coaching | T 7/17 | 10:30 – 11:30 AM | | |  | | | ★ |
| 11.02 | eSignature Basics | T 7/17 | 1 – 2 PM |  | | | | | ★ |
| 11.03 | Introduction to My Virtual StrongBox | T 7/17 | 2:30 – 3:30 PM |  | | | | | ★ |
| 11.04 | Introduction to the Enhanced Online Vault | T 7/17 | 4 – 5 PM |  | | | | | ★ |
| 9.55 | Social Engineering: The Human Side of Security | W 7/18 | 9 – 10 AM | | |  |  | | |

University Week



Course Schedule by Date

■ University Week
 ■ Sales & Marketing Week
 ■ Asterisk Intelligence Week
 ■ Lender*VP Week

| Number | Name | Date | Time (Eastern) | Webinar Format | Classroom Format | Classroom / Webcast | Available On Demand | Workshop Available | New / Revised |
|---------------|---|---------|------------------|----------------|------------------|---------------------|---------------------|--------------------|---------------|
| 9.65 | Business Continuity Planning | W 7/18 | 10:30 – 11 AM | | | | | | |
| 9.70 | Incident Response and Recovery Testing | W 7/18 | 1 – 1:30 PM | | | | | | |
| 2.00 | CU*BASE Employee Security | W 7/18 | 2 – 3 PM | | | | | | |
| 8.00 | Managing Compliance Using CU*BASE | Th 7/19 | 9 – 10 AM | | | | | | ★ |
| 8.02 | Using CU*BASE Tools for Bank Secrecy Act (BSA) Compliance | Th 7/19 | 10:30 – 11:30 AM | | | | | | |
| 8.08 | Internal Controls Best Practices | Th 7/19 | 1:30 – 2:30 PM | | | | | | |
| 8.09 | Vendor Management 101 | Th 7/19 | 3 – 4 PM | | | | | | |
| 13.01 | Shopping the IRSC Online Store | F 7/20 | 9 – 10 AM | | | | | | |
| 13.02 | MAP/MOP – Applying for Membership Online | F 7/20 | 10:30 – 11:30 AM | | | | | | |
| 13.03 | Launching Your FREE CU*Answers Mobile App | F 7/20 | 1:30 – 2:30 PM | | | | | | |
| 13.04 | Deploying Your Mobile Experience Center (MXC) | F 7/20 | 3 – 3:30 PM | | | | | | ★ |
| August | | | | | | | | | |
| 4.10 | Introduction to CU*BASE Marketing & Sales Tools | W 8/8 | 9 – 10 AM | | | | | | |
| 4.12 | Member Connect: Building a Communication Network within CU*BASE | W 8/8 | 10:30 – 11:30 AM | | | | | | |
| 4.13 | Cross Sales & Sales Trackers: Offering Members Relevant Opportunities | W 8/8 | 1:30 – 3 PM | | | | | | |
| 4.15 | Member Service Trackers, Leads, and Follow-Ups | W 8/8 | 3:30 – 4:30 PM | | | | | | |
| 4.20 | Report Builder 1: Working with Computer-Stored Data for Reports and Inquiries | Th 8/9 | 9 – 10:30 AM | | | | | | |
| 4.40 | CU*Statements | Th 8/9 | 11 AM – 12 PM | | | | | | |

Sales & Marketing Week

Course Schedule by Date

■ University Week
 ■ Sales & Marketing Week
 ■ Asterisk Intelligence Week
 ■ Lender*VP Week

| Number | Name | Date | Time (Eastern) | Webinar Format | Classroom Format | Classroom / Webcast | Available On Demand | Workshop Available | New / Revised |
|------------------|---|---------|------------------|----------------|------------------|---------------------|---------------------|--------------------|---------------|
| 4.21 | Report Builder 2: Building Custom Reports | Th 8/9 | 1:30 – 3 PM | | | | | | |
| 4.22 | Report Builder 3: Database Files & String Reports | Th 8/9 | 3:30 – 5 PM | | | | | | |
| 4.90 | Introduction to WordPress with SiteControl | F 8/10 | 9 – 10 AM | | | | | | |
| 4.91 | Advanced WordPress with SiteControl | F 8/10 | 10:30 – 11:30 AM | | | | | | |
| 4.94 | Making a Splash with Member Statements | F 8/10 | 1:30 – 2:30 PM | | | | | | |
| 4.95 | Next Suggested Product – Targeted Sales Prompts | F 8/10 | 3 – 4:30 PM | | | | | | |
| September | | | | | | | | | |
| 16.02 | Introduction to Analytics Booth | F 9/14 | 9 – 10 AM | | | | | | ★ |
| 16.03 | Analytics Booth Alerts | F 9/14 | 10:30 – 11 AM | | | | | | ★ |
| 16.04 | Audience Considerations for Analytics Booth | F 9/14 | 11:30 AM – 12 PM | | | | | | ★ |
| 16.05 | Security Considerations for Analytics Booth | F 9/14 | 1:30 – 2 PM | | | | | | ★ |
| 16.00 | Data Warehouse Strategies | F 9/14 | 2:30 – 3:30 PM | | | | | | ★ |
| 16.01 | Educating Your Board with Data | F 9/14 | 4 – 5 PM | | | | | | ★ |
| 10.01 | Relationship Management: Clubs and Tiered Services Programs | M 9/24 | 1:30 – 3 PM | | | | | | |
| 10.03 | CU*BASE Management Tools: Leadership Dashboards | W 9/26 | 1 – 2:30 PM | | | | | | |
| October | | | | | | | | | |
| 5.00 | Designing CU*BASE Loan Products | M 10/22 | 9:30 – 11 AM | | | | | | |
| 5.10 | Lending from Request to Disbursement: Understanding the Application Process | M 10/22 | 1 – 2 PM | | | | | | |

Asterisk Intelligence Week

Lender*VP Week








Course Schedule by Date

■ University Week
 ■ Sales & Marketing Week
 ■ Asterisk Intelligence Week
 ■ Lender*VP Week

| Number | Name | Date | Time (Eastern) | Webinar Format | Classroom Format | Classroom / Webcast | Available On Demand | Workshop Available | New / Revised |
|-----------------|---|----------|----------------|----------------|------------------|---------------------|---------------------|--------------------|---------------|
| 5.11 | CU*BASE Mortgage Processing | M 10/22 | 2:30 – 4 PM | | | | | | |
| 5.12 | CU*BASE Escrow Processing | T 10/23 | 9:30 – 11 AM | | | | | | |
| 5.20 | Organizing a Loan Department and Servicing Loans on CU*BASE | T 10/23 | 1 – 2:30 PM | | | | | | |
| 5.30 | Open-End and Line-of-Credit Lending | T 10/23 | 3 – 4 PM | | | | | | |
| 5.40 | Managing Bankruptcy | W 10/24 | 9:30 – 11 AM | | | | | | |
| 5.50 | Interactive Online Collections | W 10/24 | 1 – 2:30 PM | | | | | | |
| 5.70 | Centralized Underwriting: Inquiry for Loans in Process | W 10/24 | 3 – 4 PM | | | | | | |
| 5.75 | Implementing the 247 Lender Decision Model | Th 10/25 | 10 – 11 AM | | | | | | |
| 5.76 | Managing Delivery Channels | Th 10/25 | 1 – 2 PM | | | | | | |
| 5.79 | Real Estate Solutions | Th 10/25 | 2:30 – 4 PM | | | | | | |
| 5.81 | Introduction to the Loan Fulfillment Center by Accenture | F 10/26 | 9:30 – 11 AM | | | | | | |
| 5.85 | Participation Loan Servicing: Understanding the Settlement Process | F 10/26 | 1 – 2 PM | | | | | | |
| 5.86 | Secondary-Market Loan Servicing: Understanding the Settlement Process | F 10/26 | 2:30 – 3:30 PM | | | | | | |
| November | | | | | | | | | |
| 3.95 | Year-End Planning for Online Credit Unions | F 11/2 | 11 AM – 12 PM | | | | | | |
| 6.40 | Year-End Planning for Self-Processing Credit Unions | F 11/2 | 2 – 3:30 PM | | | | | | |
| 3.15 | Advanced General Ledger | M 11/12 | 1 – 2:30 PM | | | | | | |
| 3.20 | Balancing Made Easy | T 11/13 | 11 AM – 12 PM | | | | | | |

Course Schedule by Date

■ University Week
 ■ Sales & Marketing Week
 ■ Asterisk Intelligence Week
 ■ Lender*VP Week

| Number | Name | Date | Time (Eastern) | Webinar Format | Classroom Format | Classroom / Webcast | Available On Demand | Workshop Available | New / Revised |
|--------|---|----------|----------------|---|---|---------------------|---------------------|--------------------|---------------|
| 3.25 | SRS Bookkeeping Services – Sharing Our Policies and Procedures | T 11/13 | 2 – 3 PM | |  | | | | |
| 3.26 | 5300 Tools: Call Report Techniques from Xtend SRS | Th 11/15 | 2:30 – 4 PM | |  | | | | |
| 3.40 | Credit Union Financials: Configuration, Printing, and Other Options | F 11/16 | 1:30 – 3 PM | |  | | | | |
| 3.62 | Member Payroll and ACH Products | M 11/26 | 1 – 2:30 PM | |  | | | | |
| 3.71 | Understanding CU*BASE Transactions | T 11/27 | 3 – 4 PM | |  | | | | |
| 8.06 | Understanding Credit Union Liability for Security Breaches | W 11/28 | 1 – 2 PM |  | | | | | |
| 8.07 | Monitoring Abnormal Activity | Th 11/29 | 2 – 3 PM |  | | | | | |














December

University Week

| | | | | | | | | | |
|-------|---|--------|------------------|---|---|--|--|--|---|
| 14.00 | An Overview of Records and Information Management | M 12/3 | 9 – 9:30 AM | |  | | | |  |
| 14.01 | Email Overload – How to Manage It | M 12/3 | 10 – 10:30 AM | |  | | | |  |
| 15.01 | Providing First-Class Customer Service to Members | M 12/3 | 11 AM – 12 PM | |  | | | |  |
| 15.02 | Interviewing Skills with a Credit Union Slant | M 12/3 | 2 – 3 PM | |  | | | |  |
| 15.03 | Leadership Essentials for New Supervisors | T 12/4 | 9 – 10 AM | |  | | | |  |
| 15.04 | The Art of Coaching | T 12/4 | 10:30 – 11:30 AM | |  | | | |  |
| 15.00 | Microsoft Excel for Credit Unions | T 12/4 | 1:30 – 2:30 PM | |  | | | |  |
| 16.00 | Data Warehouse Strategies | T 12/4 | 3 – 4 PM |  | | | | |  |
| 16.01 | Educating Your Board with Data | W 12/5 | 9 – 10 AM |  | | | | |  |
| 16.02 | Introduction to Analytics Booth | W 12/5 | 10:30 – 11:30 AM |  | | | | |  |

Course Schedule by Date

■ University Week
 ■ Sales & Marketing Week
 ■ Asterisk Intelligence Week
 ■ Lender*VP Week

| Number | Name | Date | Time (Eastern) | Webinar Format | Classroom Format | Classroom / Webcast | Available On Demand | Workshop Available | New / Revised |
|--------|---|---------|------------------|---|---|---------------------|---------------------|--------------------|---------------|
| 16.03 | Analytics Booth Alerts | W 12/5 | 1:30 – 2 PM |  | | | | | ★ |
| 16.04 | Audience Considerations for Analytics Booth | W 12/5 | 2:30 – 3 PM |  | | | | | ★ |
| 16.05 | Security Considerations for Analytics Booth | W 12/5 | 3:30 – 4 PM |  | | | | | ★ |
| 13.01 | Shopping the IRSC Online Store | Th 12/6 | 9 – 10 AM | |  | | | | |
| 13.02 | MAP/MOP – Applying for Membership Online | Th 12/6 | 10:30 – 11:30 AM | |  | | | | |
| 13.03 | Launching Your FREE CU*Answers Mobile App | Th 12/6 | 1:30 – 2:30 PM | |  | | | | |
| 13.04 | Deploying Your Mobile Experience Center (MXC) | Th 12/6 | 3 – 3:30 PM | |  | | | | ★ |
| 12.00 | Standard ATM/Debit Card Platform | F 12/7 | 9 – 10 AM | |  | | | | |
| 12.01 | Online Credit Cards: Loan Creation and Card Embossing | F 12/7 | 10:45 – 11:30 AM | |  | | | | |
| 12.02 | Online Credit Cards: Daily Maintenance/ Reports | F 12/7 | 1:30 – 2:30 PM | |  | | | | |
| 12.03 | Online Credit Cards: On the Front Line | F 12/7 | 3 – 4 PM | |  | | | | |
| 3.95 | Year-End Planning for Online Credit Unions | M 12/10 | 10 – 11 AM | |  | | | | |
| 6.40 | Year-End Planning for Self-Processing Credit Unions | M 12/10 | 1:30 – 3 PM | |  | | | | |

Course Schedule by Category

In this section is a list of all CU*Answers University courses listed by job category. To register for any of the courses listed here, visit cuanswers.com/resources/edu/courses.

Category Explanations

Below and on the following pages are explanations of each category listed in the schedule that follows.

Teller/Member Service

Geared toward all credit union staff, courses in this category cover a variety of teller and member service topics such as the basics of how to use CU*BASE as well as CU*BASE share, savings, certificate, IRA, and loan products.

Supervisory/Management

Courses in this category are designed for credit union management and cover such topics as CU*BASE management tools, budgeting and strategic-planning tools, employee security, savings and certificate product configuration, and online banking security.

Accounting/Back Office

Developed for credit union accounting staff, courses in this category cover such topics as beginning- and end-of-day processing, year-end processing, cash/vault system management, general ledger tools, and daily balancing procedures. Also covered are shared-branching bookkeeping services, 5300 Call Report tools, accounts payable tools, chart of accounts configuration, member payroll and ACH products, CU*BASE transaction processing, and multi-corporation processing.

Marketing/Sales

Courses in this category introduce credit union marketing staff to CU*BASE sales tools such as Member Connect, Tracker, Next Suggested Product, Report Builder, and Smart Messages. Course topics also include iSeries File Transfers, member statements, and WordPress with SiteControl.

Lender*VP

Courses in this category help credit union lending staff learn about CU*BASE loan product configuration and servicing, mortgage and escrow processing, investor relations, line-of-credit lending, bankruptcy management and collections, centralized underwriting, loan decisioning, and participation loan servicing.

Self-Processing

Designed exclusively for CU*Answers self-processing credit unions, courses in this category cover such topics as organizing and managing an operations center, iSeries system security, hardware management, and year-end planning.

Network Services

Developed primarily for credit union information technology staff, courses in this category cover such topics as hardware and communications, CU*BASE updates and support, and software configuration.

Enterprise Risk Management

Courses in this category are geared toward a variety of credit union personnel and cover such topics as CU*BASE compliance and risk-management tools, membership-agreement concerns, credit union liability in the case of security breaches, abnormal activity monitoring, fraud prevention and response, internal controls, and vendor management.

Secure-U

Designed for all credit union personnel, courses in this category cover important security-related topics such as social engineering, business continuity, and incident response.

Earnings Edge

Geared primarily toward credit union marketing personnel and leadership staff, courses in this category cover such topics as CU*BASE data-analysis tools, Clubs and Tiered Service programs, and dividend processing.

Imaging Solutions

Courses in this category introduce credit union staff to imaging products and services such as eLoan forms, eSignatures, My Virtual StrongBox, and online vaults.

SettleMINT EFT

Designed for member service and accounting staff, as well as those who work with electronic funds transfers, courses in this category cover such topics as ATM/debit card processing, online credit card processing, and online bill pay processing.

Internet Retailer Support Center

Courses in this category introduce credit union staff to options that will help them better position themselves as Internet retailers. Course topics include online, mobile, and text banking branding options, the online membership application and opening processes, the CU*Answers mobile app, and products and services available through the Internet Retailer Support Center (IRSC) online store.

Records and Information Management

Courses in this category show credit union staff how to implement an effective records and information management program and how to manage email overload.

Organizational Resource Development







Geared toward all credit union staff, courses in this category relate to human resources and helping staff reach their full potential. Courses cover such topics as Microsoft Excel, customer service best practices, interviewing skills, and leadership basics.

Asterisk Intelligence

Courses in this category help credit union staff get the most out of CU*BASE data by introducing them to the many different data warehouses that CU*Answers offers and by showing them how to access and gain key insights from their credit union financial data. Participants will also learn the ins and outs of CU*Answers Analytics Booth online data-analytics tools.











Symbols

Below is a key to the symbols used in this schedule.


















| | | | | | |
|---|---|---|---|---|---|
| Webinar Format | Classroom Format | Classroom / Webcast | Available On Demand | Workshop Available | New / Revised |
|  |  |  |  |  |  |
| The course is offered via webinar. See page 12 for details. | The course is offered in person. See page 5 for details. | The course is offered both in person and via webcast. See page 11 for details. | The course has an on-demand equivalent. See page 9 for details. | A workshop can be requested for the course. See page 5 for details. | The course is new or the content has been revised. |

Schedule

Course Schedule by Category

| Number | Name | Date | Time (Eastern) | Webinar Format | Classroom Format | Classroom / Webcast | Available On Demand | Workshop Available | New / Revised |
|------------------------------|---|--------|----------------|---|---|---------------------|---|--------------------|---------------|
| Teller/Member Service | | | | | | | | | |
| 1.01 | Member Services: Account Inquiry and Phone Operator | Th 2/8 | 9:30 – 11 AM |  | | |  | | |
| 1.01 | Member Services: Account Inquiry and Phone Operator | M 6/4 | 1:30 – 3 PM | |  | |  | | |
| 1.20 | Teller Techniques and Shared-Branching Options | Th 2/8 | 1 – 2:30 PM |  | | |  | | |
| 1.20 | Teller Techniques and Shared-Branching Options | W 6/6 | 1 – 2:30 PM | |  | |  | | |
| 1.30 | Head Teller Vault/Change Fund Management | Th 2/8 | 3 – 4 PM |  | | | | | |
| 1.30 | Head Teller Vault/Change Fund Management | F 6/8 | 11 AM – 12 PM | |  | | | | |

Course Schedule by Category

| Number | Name | Date | Time (Eastern) | Webinar Format | Classroom Format | Classroom / Webcast | Available On Demand | Workshop Available | New / Revised |
|-------------------------------|---|----------|------------------|---|---|---------------------|---------------------|--------------------|---------------|
| Supervisory/Management | | | | | | | | | |
| 2.00 | CU*BASE Employee Security | Th 1/4 | 11 AM – 12 PM |  | | | | | |
| 2.00 | CU*BASE Employee Security | W 7/18 | 2 – 3 PM | |  | | | | |
| Accounting/Back Office | | | | | | | | | |
| 3.15 | Advanced General Ledger | M 6/11 | 1 – 2:30 PM |  | | | | | |
| 3.15 | Advanced General Ledger | M 11/12 | 1 – 2:30 PM | |  | | | | |
| 3.20 | Balancing Made Easy | T 6/12 | 11 AM – 12 PM |  | | | | | |
| 3.20 | Balancing Made Easy | T 11/13 | 11 AM – 12 PM | |  | | | | |
| 3.25 | SRS Bookkeeping Services – Sharing Our Policies and Procedures | F 4/20 | 9 – 10 AM |  | | | | | |
| 3.25 | SRS Bookkeeping Services – Sharing Our Policies and Procedures | T 11/13 | 2 – 3 PM | |  | | | | |
| 3.26 | 5300 Tools: Call Report Techniques from Xtend SRS | F 4/20 | 10:30 AM – 12 PM |  | | | | | |
| 3.26 | 5300 Tools: Call Report Techniques from Xtend SRS | Th 11/15 | 2:30 – 4 PM | |  | | | | |
| 3.40 | Credit Union Financials: Configuration, Printing, and Other Options | F 4/20 | 2 – 3:30 PM |  | | | | | |
| 3.40 | Credit Union Financials: Configuration, Printing, and Other Options | F 11/16 | 1:30 – 3 PM | |  | | | | |
| 3.62 | Member Payroll and ACH Products | W 6/13 | 1:30 – 3 PM |  | | | | | |
| 3.62 | Member Payroll and ACH Products | M 11/26 | 1 – 2:30 PM | |  | | | | |
| 3.71 | Understanding CU*BASE Transactions | Th 6/14 | 2 – 3 PM |  | | | | | |
| 3.71 | Understanding CU*BASE Transactions | T 11/27 | 3 – 4 PM | |  | | | | |
| 3.95 | Year-End Planning for Online Credit Unions | F 11/2 | 11 AM – 12 PM |  | | | | | |

Course Schedule by Category

| Number | Name | Date | Time (Eastern) | Webinar Format | Classroom Format | Classroom / Webcast | Available On Demand | Workshop Available | New / Revised |
|------------------------|---|---------|------------------|----------------|------------------|---------------------|---------------------|--------------------|---------------|
| 3.95 | Year-End Planning for Online Credit Unions | M 12/10 | 10 – 11 AM | | | | | | |
| Marketing/Sales | | | | | | | | | |
| 4.10 | Introduction to CU*BASE Marketing & Sales Tools | W 2/21 | 9 – 10 AM | | | | | | |
| 4.10 | Introduction to CU*BASE Marketing & Sales Tools | W 8/8 | 9 – 10 AM | | | | | | |
| 4.12 | Member Connect: Building a Communication Network within CU*BASE | W 2/21 | 10:30 – 11:30 AM | | | | | | |
| 4.12 | Member Connect: Building a Communication Network within CU*BASE | W 8/8 | 10:30 – 11:30 AM | | | | | | |
| 4.13 | Cross Sales & Sales Trackers: Offering Members Relevant Opportunities | W 2/21 | 1:30 – 3 PM | | | | | | |
| 4.13 | Cross Sales & Sales Trackers: Offering Members Relevant Opportunities | W 8/8 | 1:30 – 3 PM | | | | | | |
| 4.15 | Member Service Trackers, Leads, and Follow-Ups | W 2/21 | 3:30 – 4:30 PM | | | | | | |
| 4.15 | Member Service Trackers, Leads, and Follow-Ups | W 8/8 | 3:30 – 4:30 PM | | | | | | |
| 4.20 | Report Builder 1: Working with Computer-Stored Data for Reports and Inquiries | Th 2/22 | 9 – 10:30 AM | | | | | | |
| 4.20 | Report Builder 1: Working with Computer-Stored Data for Reports and Inquiries | Th 8/9 | 9 – 10:30 AM | | | | | | |
| 4.21 | Report Builder 2: Building Custom Reports | Th 2/22 | 1:30 – 3 PM | | | | | | |
| 4.21 | Report Builder 2: Building Custom Reports | Th 8/9 | 1:30 – 3 PM | | | | | | |
| 4.22 | Report Builder 3: Database Files & String Reports | Th 2/22 | 3:30 – 5 PM | | | | | | |
| 4.22 | Report Builder 3: Database Files & String Reports | Th 8/9 | 3:30 – 5 PM | | | | | | |
| 4.40 | CU*Statements | Th 2/22 | 11 AM – 12 PM | | | | | | |
| 4.40 | CU*Statements | Th 8/9 | 11 AM – 12 PM | | | | | | |
| 4.90 | Introduction to WordPress with SiteControl | F 2/23 | 9 – 10 AM | | | | | | |

Course Schedule by Category

| Number | Name | Date | Time (Eastern) | Webinar Format | Classroom Format | Classroom / Webcast | Available On Demand | Workshop Available | New / Revised |
|--------|---|--------|------------------|----------------|------------------|---------------------|---------------------|--------------------|---------------|
| 4.90 | Introduction to WordPress with SiteControl | F 8/10 | 9 – 10 AM | | | | | | |
| 4.91 | Advanced WordPress with SiteControl | F 2/23 | 10:30 – 11:30 AM | | | | | | |
| 4.91 | Advanced WordPress with SiteControl | F 8/10 | 10:30 – 11:30 AM | | | | | | |
| 4.94 | Making a Splash with Member Statements | F 2/23 | 1:30 – 2:30 PM | | | | | | |
| 4.94 | Making a Splash with Member Statements | F 8/10 | 1:30 – 2:30 PM | | | | | | |
| 4.95 | Next Suggested Product – Targeted Sales Prompts | F 2/23 | 3 – 4:30 PM | | | | | | |
| 4.95 | Next Suggested Product – Targeted Sales Prompts | F 8/10 | 3 – 4:30 PM | | | | | | |

Lender*VP

| | | | | | | | | | |
|------|---|---------|--------------|--|--|--|--|--|--|
| 5.00 | Designing CU*BASE Loan Products | M 5/7 | 9:30 – 11 AM | | | | | | |
| 5.00 | Designing CU*BASE Loan Products | M 10/22 | 9:30 – 11 AM | | | | | | |
| 5.10 | Lending from Request to Disbursement: Understanding the Application Process | M 5/7 | 1 – 2 PM | | | | | | |
| 5.10 | Lending from Request to Disbursement: Understanding the Application Process | M 10/22 | 1 – 2 PM | | | | | | |
| 5.11 | CU*BASE Mortgage Processing | M 5/7 | 2:30 – 4 PM | | | | | | |
| 5.11 | CU*BASE Mortgage Processing | M 10/22 | 2:30 – 4 PM | | | | | | |
| 5.12 | CU*BASE Escrow Processing | T 5/8 | 9:30 – 11 AM | | | | | | |
| 5.12 | CU*BASE Escrow Processing | T 10/23 | 9:30 – 11 AM | | | | | | |
| 5.20 | Organizing a Loan Department and Servicing Loans on CU*BASE | T 5/8 | 1 – 2:30 PM | | | | | | |
| 5.20 | Organizing a Loan Department and Servicing Loans on CU*BASE | T 10/23 | 1 – 2:30 PM | | | | | | |
| 5.30 | Open-End and Line-of-Credit Lending | T 5/8 | 3 – 4 PM | | | | | | |



Course Schedule by Category

| Number | Name | Date | Time (Eastern) | Webinar Format | Classroom Format | Classroom / Webcast | Available On Demand | Workshop Available | New / Revised |
|--------|---|----------|----------------|----------------|------------------|---------------------|---------------------|--------------------|---------------|
| 5.30 | Open-End and Line-of-Credit Lending | T 10/23 | 3 – 4 PM | | | | | | |
| 5.40 | Managing Bankruptcy | W 5/9 | 9:30 – 11 AM | | | | | | |
| 5.40 | Managing Bankruptcy | W 10/24 | 9:30 – 11 AM | | | | | | |
| 5.50 | Interactive Online Collections | W 5/9 | 1 – 2:30 PM | | | | | | |
| 5.50 | Interactive Online Collections | W 10/24 | 1 – 2:30 PM | | | | | | |
| 5.70 | Centralized Underwriting: Inquiry for Loans in Process | W 5/9 | 3 – 4 PM | | | | | | |
| 5.70 | Centralized Underwriting: Inquiry for Loans in Process | W 10/24 | 3 – 4 PM | | | | | | |
| 5.75 | Implementing the 247 Lender Decision Model | Th 5/10 | 10 – 11 AM | | | | | | |
| 5.75 | Implementing the 247 Lender Decision Model | Th 10/25 | 10 – 11 AM | | | | | | |
| 5.76 | Managing Delivery Channels | Th 5/10 | 1 – 2 PM | | | | | | |
| 5.76 | Managing Delivery Channels | Th 10/25 | 1 – 2 PM | | | | | | |
| 5.79 | Real Estate Solutions | Th 5/10 | 2:30 – 4 PM | | | | | | |
| 5.79 | Real Estate Solutions | Th 10/25 | 2:30 – 4 PM | | | | | | |
| 5.81 | Introduction to the Loan Fulfillment Center by Accenture | F 5/11 | 9:30 – 11 AM | | | | | | |
| 5.81 | Introduction to the Loan Fulfillment Center by Accenture | F 10/26 | 9:30 – 11 AM | | | | | | |
| 5.85 | Participation Loan Servicing: Understanding the Settlement Process | F 5/11 | 1 – 2 PM | | | | | | |
| 5.85 | Participation Loan Servicing: Understanding the Settlement Process | F 10/26 | 1 – 2 PM | | | | | | |
| 5.86 | Secondary-Market Loan Servicing: Understanding the Settlement Process | F 5/11 | 2:30 – 3:30 PM | | | | | | |
| 5.86 | Secondary-Market Loan Servicing: Understanding the Settlement Process | F 10/26 | 2:30 – 3:30 PM | | | | | | |

Course Schedule by Category

| Number | Name | Date | Time (Eastern) | Webinar Format | Classroom Format | Classroom / Webcast | Available On Demand | Workshop Available | New / Revised |
|-----------------------------------|--|----------|------------------|----------------|------------------|---------------------|---------------------|--------------------|---------------|
| Self-Processing | | | | | | | | | |
| 6.40 | Year-End Planning for Self-Processing Credit Unions | F 11/2 | 2 – 3:30 PM | | | | | | |
| 6.40 | Year-End Planning for Self-Processing Credit Unions | M 12/10 | 1:30 – 3 PM | | | | | | |
| Enterprise Risk Management | | | | | | | | | |
| 8.00 | Managing Compliance Using CU*BASE | M 1/8 | 3 – 4 PM | | | | | | ★ |
| 8.00 | Managing Compliance Using CU*BASE | Th 7/19 | 9 – 10 AM | | | | | | ★ |
| 8.02 | Using CU*BASE Tools for Bank Secrecy Act (BSA) Compliance | W 1/10 | 2 – 3 PM | | | | | | |
| 8.02 | Using CU*BASE Tools for Bank Secrecy Act (BSA) Compliance | Th 7/19 | 10:30 – 11:30 AM | | | | | | |
| 8.06 | Understanding Credit Union Liability for Security Breaches | F 1/12 | 1 – 2 PM | | | | | | |
| 8.06 | Understanding Credit Union Liability for Security Breaches | W 11/28 | 1 – 2 PM | | | | | | |
| 8.07 | Monitoring Abnormal Activity | M 1/15 | 2 – 3 PM | | | | | | |
| 8.07 | Monitoring Abnormal Activity | Th 11/29 | 2 – 3 PM | | | | | | |
| 8.08 | Internal Controls Best Practices | W 1/17 | 1 – 2 PM | | | | | | |
| 8.08 | Internal Controls Best Practices | Th 7/19 | 1:30 – 2:30 PM | | | | | | |
| 8.09 | Vendor Management 101 | F 1/19 | 11 AM – 12 PM | | | | | | |
| 8.09 | Vendor Management 101 | Th 7/19 | 3 – 4 PM | | | | | | |
| Secure-U | | | | | | | | | |
| 9.55 | Social Engineering: The Human Side of Security | T 1/23 | 3 – 4 PM | | | | | | |
| 9.55 | Social Engineering: The Human Side of Security | W 7/18 | 9 – 10 AM | | | | | | |



Course Schedule by Category

| Number | Name | Date | Time (Eastern) | Webinar Format | Classroom Format | Classroom / Webcast | Available On Demand | Workshop Available | New / Revised |
|--------|--|---------|----------------|----------------|------------------|---------------------|---------------------|--------------------|---------------|
| 9.65 | Business Continuity Planning | Th 1/25 | 1 – 2 PM | | | | | | |
| 9.65 | Business Continuity Planning | W 7/18 | 10:30 – 11 AM | | | | | | |
| 9.70 | Incident Response and Recovery Testing | T 1/30 | 2 – 3 PM | | | | | | |
| 9.70 | Incident Response and Recovery Testing | W 7/18 | 1 – 1:30 PM | | | | | | |

Earnings Edge

| | | | | | | | | | |
|-------|---|---------|---------------|--|--|--|--|--|--|
| 10.00 | Data Mining: “Know Your Member” Analysis Tools | T 3/27 | 2 – 3 PM | | | | | | |
| 10.00 | Data Mining: “Know Your Member” Analysis Tools | T 6/19 | 2 – 3 PM | | | | | | |
| 10.01 | Relationship Management: Clubs and Tiered Services Programs | Th 6/21 | 1:30 – 3 PM | | | | | | |
| 10.01 | Relationship Management: Clubs and Tiered Services Programs | M 9/24 | 1:30 – 3 PM | | | | | | |
| 10.02 | Dividend Processing and Member Deposits | Th 3/29 | 11 AM – 12 PM | | | | | | |
| 10.02 | Dividend Processing and Member Deposits | W 6/20 | 11 AM – 12 PM | | | | | | |
| 10.03 | CU*BASE Management Tools: Leadership Dashboards | F 6/22 | 1 – 2:30 PM | | | | | | |
| 10.03 | CU*BASE Management Tools: Leadership Dashboards | W 9/26 | 1 – 2:30 PM | | | | | | |

Imaging Solutions

| | | | | | | | | | |
|-------|---|--------|----------------|--|--|--|--|--|---|
| 11.02 | eSignature Basics | T 2/6 | 1 – 2 PM | | | | | | ★ |
| 11.02 | eSignature Basics | T 7/17 | 1 – 2 PM | | | | | | ★ |
| 11.03 | Introduction to My Virtual StrongBox | T 2/6 | 2:30 – 3:30 PM | | | | | | ★ |
| 11.03 | Introduction to My Virtual StrongBox | T 7/17 | 2:30 – 3:30 PM | | | | | | ★ |
| 11.04 | Introduction to the Enhanced Online Vault | T 2/6 | 4 – 5 PM | | | | | | ★ |

Course Schedule by Category

| Number | Name | Date | Time (Eastern) | Webinar Format | Classroom Format | Classroom / Webcast | Available On Demand | Workshop Available | New / Revised |
|--------|------|------|----------------|----------------|------------------|---------------------|---------------------|--------------------|---------------|
|--------|------|------|----------------|----------------|------------------|---------------------|---------------------|--------------------|---------------|

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|-------|---|--------|----------|--|--|--|--|--|---|
| 11.04 | Introduction to the Enhanced Online Vault | T 7/17 | 4 – 5 PM | | | | | | ★ |
|-------|---|--------|----------|--|--|--|--|--|---|

SettleMINT EFT

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|-------|---|--------|------------------|--|--|--|--|--|--|
| 12.00 | Standard ATM/Debit Card Platform | W 2/7 | 9 – 10 AM | | | | | | |
| 12.00 | Standard ATM/Debit Card Platform | F 12/7 | 9 – 10 AM | | | | | | |
| 12.01 | Online Credit Cards: Loan Creation and Card Embossing | W 2/7 | 10:30 – 11:15 AM | | | | | | |
| 12.01 | Online Credit Cards: Loan Creation and Card Embossing | F 12/7 | 10:45 – 11:30 AM | | | | | | |
| 12.02 | Online Credit Cards: Daily Maintenance/ Reports | W 2/7 | 1:30 – 2:30 PM | | | | | | |
| 12.02 | Online Credit Cards: Daily Maintenance/ Reports | F 12/7 | 1:30 – 2:30 PM | | | | | | |
| 12.03 | Online Credit Cards: On the Front Line | W 2/7 | 3 – 4 PM | | | | | | |
| 12.03 | Online Credit Cards: On the Front Line | F 12/7 | 3 – 4 PM | | | | | | |

Internet Retailer Support Center

| | | | | | | | | | |
|-------|--|---------|------------------|--|--|--|--|--|--|
| 13.01 | Shopping the IRSC Online Store | F 2/9 | 9 – 10 AM | | | | | | |
| 13.01 | Shopping the IRSC Online Store | Th 4/19 | 9 – 10 AM | | | | | | |
| 13.01 | Shopping the IRSC Online Store | F 7/20 | 9 – 10 AM | | | | | | |
| 13.01 | Shopping the IRSC Online Store | Th 12/6 | 9 – 10 AM | | | | | | |
| 13.02 | MAP/MOP – Applying for Membership Online | F 2/9 | 10:30 – 11:30 AM | | | | | | |
| 13.02 | MAP/MOP – Applying for Membership Online | Th 4/19 | 10:30 – 11:30 AM | | | | | | |
| 13.02 | MAP/MOP – Applying for Membership Online | F 7/20 | 10:30 – 11:30 AM | | | | | | |
| 13.02 | MAP/MOP – Applying for Membership Online | Th 12/6 | 10:30 – 11:30 AM | | | | | | |

Course Schedule by Category

| Number | Name | Date | Time (Eastern) | Webinar Format | Classroom Format | Classroom / Webcast | Available On Demand | Workshop Available | New / Revised |
|--------|---|---------|----------------|----------------|------------------|---------------------|---------------------|--------------------|---------------|
| 13.03 | Launching Your FREE CU*Answers Mobile App | F 2/9 | 1:30 – 2:30 PM | | | | | | |
| 13.03 | Launching Your FREE CU*Answers Mobile App | Th 4/19 | 1:30 – 2:30 PM | | | | | | |
| 13.03 | Launching Your FREE CU*Answers Mobile App | F 7/20 | 1:30 – 2:30 PM | | | | | | |
| 13.03 | Launching Your FREE CU*Answers Mobile App | Th 12/6 | 1:30 – 2:30 PM | | | | | | |
| 13.04 | Deploying Your Mobile Experience Center (MXC) | F 2/9 | 3 – 3:30 PM | | | | | | ★ |
| 13.04 | Deploying Your Mobile Experience Center (MXC) | Th 4/19 | 3 – 3:30 PM | | | | | | ★ |
| 13.04 | Deploying Your Mobile Experience Center (MXC) | F 7/20 | 3 – 3:30 PM | | | | | | ★ |
| 13.04 | Deploying Your Mobile Experience Center (MXC) | Th 12/6 | 3 – 3:30 PM | | | | | | ★ |

Records & Information Management

| | | | | | | | | | |
|-------|---|--------|---------------|--|--|--|--|--|---|
| 14.00 | An Overview of Records and Information Management | M 2/5 | 9 – 9:30 AM | | | | | | ★ |
| 14.00 | An Overview of Records and Information Management | M 4/16 | 9 – 9:30 AM | | | | | | ★ |
| 14.00 | An Overview of Records and Information Management | M 7/16 | 9 – 9:30 AM | | | | | | ★ |
| 14.00 | An Overview of Records and Information Management | M 12/3 | 9 – 9:30 AM | | | | | | ★ |
| 14.01 | Email Overload – How to Manage It | M 2/5 | 10 – 10:30 AM | | | | | | ★ |
| 14.01 | Email Overload – How to Manage It | M 4/16 | 10 – 10:30 AM | | | | | | ★ |
| 14.01 | Email Overload – How to Manage It | M 7/16 | 10 – 10:30 AM | | | | | | ★ |
| 14.01 | Email Overload – How to Manage It | M 12/3 | 10 – 10:30 AM | | | | | | ★ |

Organizational Resource Development

| | | | | | | | | | |
|-------|-----------------------------------|-------|----------------|--|--|--|--|--|---|
| 15.00 | Microsoft Excel for Credit Unions | M 2/5 | 3:30 – 4:30 PM | | | | | | ★ |
|-------|-----------------------------------|-------|----------------|--|--|--|--|--|---|



Course Schedule by Category

| Number | Name | Date | Time (Eastern) | Webinar Format | Classroom Format | Classroom / Webcast | Available On Demand | Workshop Available | New / Revised |
|--------|---|--------|------------------|----------------|------------------|---------------------|---------------------|--------------------|---------------|
| 15.00 | Microsoft Excel for Credit Unions | T 4/17 | 1:30 – 2:30 PM | | | | | | ★ |
| 15.00 | Microsoft Excel for Credit Unions | M 7/16 | 3:30 – 4:30 PM | | | | | | ★ |
| 15.00 | Microsoft Excel for Credit Unions | T 12/4 | 1:30 – 2:30 PM | | | | | | ★ |
| 15.01 | Providing First-Class Customer Service to Members | M 2/5 | 11 AM – 12 PM | | | | | | ★ |
| 15.01 | Providing First-Class Customer Service to Members | M 4/16 | 11 AM – 12 PM | | | | | | ★ |
| 15.01 | Providing First-Class Customer Service to Members | M 7/16 | 11 AM – 12 PM | | | | | | ★ |
| 15.01 | Providing First-Class Customer Service to Members | M 12/3 | 11 AM – 12 PM | | | | | | ★ |
| 15.02 | Interviewing Skills with a Credit Union Slant | M 2/5 | 2 – 3 PM | | | | | | ★ |
| 15.02 | Interviewing Skills with a Credit Union Slant | M 4/16 | 2 – 3 PM | | | | | | ★ |
| 15.02 | Interviewing Skills with a Credit Union Slant | M 7/16 | 2 – 3 PM | | | | | | ★ |
| 15.02 | Interviewing Skills with a Credit Union Slant | M 12/3 | 2 – 3 PM | | | | | | ★ |
| 15.03 | Leadership Essentials for New Supervisors | T 2/6 | 9 – 10 AM | | | | | | ★ |
| 15.03 | Leadership Essentials for New Supervisors | T 4/17 | 9 – 10 AM | | | | | | ★ |
| 15.03 | Leadership Essentials for New Supervisors | T 7/17 | 9 – 10 AM | | | | | | ★ |
| 15.03 | Leadership Essentials for New Supervisors | T 12/4 | 9 – 10 AM | | | | | | ★ |
| 15.04 | The Art of Coaching | T 2/6 | 10:30 – 11:30 AM | | | | | | ★ |
| 15.04 | The Art of Coaching | T 4/17 | 10:30 – 11:30 AM | | | | | | ★ |
| 15.04 | The Art of Coaching | T 7/17 | 10:30 – 11:30 AM | | | | | | ★ |
| 15.04 | The Art of Coaching | T 12/4 | 10:30 – 11:30 AM | | | | | | ★ |

Course Schedule by Category

| Number | Name | Date | Time (Eastern) | Webinar Format | Classroom Format | Classroom / Webcast | Available On Demand | Workshop Available | New / Revised |
|------------------------------|---|--------|------------------|----------------|------------------|---------------------|---------------------|--------------------|---------------|
| Asterisk Intelligence | | | | | | | | | |
| 16.00 | Data Warehouse Strategies | F 3/9 | 2:30 – 3:30 PM | | | | | | ★ |
| 16.00 | Data Warehouse Strategies | T 4/17 | 3 – 4 PM | | | | | | ★ |
| 16.00 | Data Warehouse Strategies | F 9/14 | 2:30 – 3:30 PM | | | | | | ★ |
| 16.00 | Data Warehouse Strategies | T 12/4 | 3 – 4 PM | | | | | | ★ |
| 16.01 | Educating Your Board with Data | F 3/9 | 4 – 5 PM | | | | | | ★ |
| 16.01 | Educating Your Board with Data | W 4/18 | 9 – 10 AM | | | | | | ★ |
| 16.01 | Educating Your Board with Data | F 9/14 | 4 – 5 PM | | | | | | ★ |
| 16.01 | Educating Your Board with Data | W 12/5 | 9 – 10 AM | | | | | | ★ |
| 16.02 | Introduction to Analytics Booth | F 3/9 | 9 – 10 AM | | | | | | ★ |
| 16.02 | Introduction to Analytics Booth | W 4/18 | 10:30 – 11:30 AM | | | | | | ★ |
| 16.02 | Introduction to Analytics Booth | F 9/14 | 9 – 10 AM | | | | | | ★ |
| 16.02 | Introduction to Analytics Booth | W 12/5 | 10:30 – 11:30 AM | | | | | | ★ |
| 16.03 | Analytics Booth Alerts | F 3/9 | 10:30 – 11 AM | | | | | | ★ |
| 16.03 | Analytics Booth Alerts | W 4/18 | 1:30 – 2 PM | | | | | | ★ |
| 16.03 | Analytics Booth Alerts | F 9/14 | 10:30 – 11 AM | | | | | | ★ |
| 16.03 | Analytics Booth Alerts | W 12/5 | 1:30 – 2 PM | | | | | | ★ |
| 16.04 | Audience Considerations for Analytics Booth | F 3/9 | 11:30 AM – 12 PM | | | | | | ★ |
| 16.04 | Audience Considerations for Analytics Booth | W 4/18 | 2:30 – 3 PM | | | | | | ★ |

Course Schedule by Category

| Number | Name | Date | Time (Eastern) | Webinar Format | Classroom Format | Classroom / Webcast | Available On Demand | Workshop Available | New / Revised |
|--------|---|--------|------------------|---|------------------|---|---------------------|--------------------|---------------|
| 16.04 | Audience Considerations for Analytics Booth | F 9/14 | 11:30 AM – 12 PM | | |  | | | ★ |
| 16.04 | Audience Considerations for Analytics Booth | W 12/5 | 2:30 – 3 PM |  | | | | | ★ |
| 16.05 | Security Considerations for Analytics Booth | F 3/9 | 1:30 – 2 PM | | |  | | | ★ |
| 16.05 | Security Considerations for Analytics Booth | W 4/18 | 3:30 – 4 PM |  | | | | | ★ |
| 16.05 | Security Considerations for Analytics Booth | F 9/14 | 1:30 – 2 PM | | |  | | | ★ |
| 16.05 | Security Considerations for Analytics Booth | W 12/5 | 3:30 – 4 PM |  | | | | | ★ |

Course Syllabi

In this section, you will find a syllabus that corresponds to each course found in the All Course List on the following pages. Each syllabus lists a brief course description, the audience for whom the course was designed, course objectives, and topics covered, as well as an on-demand equivalent or supplemental workshop, if applicable. Following is a reference table to help you more easily find and register for courses whose syllabi are included in this section.

Course Categories

To help you more easily find the course syllabi you're looking for, below is a guide listing the range of numbers for each category of syllabi in this section.

| Course Category | Beginning # | Ending # | See Pages |
|-------------------------------------|-------------|----------|------------|
| Teller/Member Service | 0.10 | 1.80 | 59 to 69 |
| Supervisory/Management | 2.00 | 2.96 | 70 to 81 |
| Accounting/Back Office | 3.00 | 3.96 | 82 to 98 |
| Marketing/Sales | 4.00 | 4.95 | 99 to 112 |
| Lender*VP | 5.00 | 5.86 | 113 to 130 |
| Self-Processing | 6.00 | 6.40 | 131 to 135 |
| Network Services | 7.00 | 7.25 | 136 to 139 |
| Enterprise Risk Management | 8.00 | 8.09 | 140 to 148 |
| Secure-U | 9.55 | 9.70 | 149 to 151 |
| Earnings Edge | 10.00 | 10.03 | 152 to 155 |
| Imaging Solutions | 11.00 | 11.04 | 156 to 160 |
| SettleMINT EFT | 12.00 | 12.08 | 158 to 169 |
| Internet Retailer Support Center | 13.00 | 13.04 | 170 to 174 |
| Records & Information Management | 14.00 | 14.01 | 175 to 176 |
| Organizational Resource Development | 15.00 | 15.04 | 177 to 181 |
| Asterisk Intelligence | 16.00 | 16.05 | 182 to 187 |

All Course List

Listed on the following pages are all 128 courses offered at CU*Answers, both ones in circulation and ones that are available upon request. To view dates/times of courses in circulation, refer to the course schedules beginning on page 27. To request a course available upon request, contact the CU*Answers Client Services & Education team at education@cuanswers.com. For detailed course descriptions, refer to the course syllabi beginning on page 59.

All Course List

| Course # | Course Name | In Circulation | By Request | See Page |
|----------|--|----------------|------------|----------|
| 0.10 | Introduction to CU*Answers CU*BASE | | ☒ | 59 |
| 0.60 | CU*Spy Online Reports and Statement Retrieval | | ☒ | 60 |
| 1.00 | Introduction to Teller Processing | | ☒ | 61 |
| 1.01 | Member Services: Account Inquiry and Phone Operator | ⌵ | | 62 |
| 1.20 | Teller Techniques and Shared-Branching Options | ⌵ | | 63 |
| 1.30 | Head Teller Vault/Change Fund Management | ⌵ | | 64 |
| 1.40 | Day-to-Day Certificates | | ☒ | 65 |
| 1.50 | Day-to-Day Savings Products | | ☒ | 66 |
| 1.60 | Day-to-Day IRAs | | ☒ | 67 |
| 1.70 | Day-to-Day Loan Servicing | | ☒ | 68 |
| 1.80 | Teller Cash Dispensers, Recyclers, and CU*BASE | | ☒ | 69 |
| 2.00 | CU*BASE Employee Security | ⌵ | | 70 |
| 2.10 | Designing Savings and Certificate Products | | ☒ | 71 |
| 2.11 | Introduction to Miscellaneous Member Account Forms | | ☒ | 72 |
| 2.21 | It's Me 247 Online Banking | | ☒ | 73 |
| 2.25 | Providing Added Security in Online Banking with the Personal Internet Branch | | ☒ | 74 |
| 2.30 | Rate Maintenance & CU*BASE Tools for Pricing Products | | ☒ | 75 |
| 2.40 | Variable-Rate Products and CU*BASE Tools | | ☒ | 76 |
| 2.50 | CU*BASE Operations | | ☒ | 77 |
| 2.60 | CU*BASE Management Tools: A Window to Day-to-Day Credit Union Activity | | ☒ | 78 |
| 2.80 | Member Fees and Bundled Services | | ☒ | 79 |
| 2.95 | CU Budget and Strategic-Planning Tools | | ☒ | 80 |
| 2.96 | Using AnswerBook to Find Answers and Track Staff Questions | | ☒ | 81 |
| 3.00 | Introduction to Accounting | | ☒ | 82 |
| 3.10 | Introduction to General Ledger Tools | | ☒ | 83 |
| 3.15 | Advanced General Ledger | ⌵ | | 84 |
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0.10 Introduction to CU*Answers CU*BASE

Teller/Member Service

Course length: 1 hour

Summary

This course concentrates on the CU*BASE login process. It also covers workstation security, credit union security, and how to navigate to various CU*BASE tools. The course shows participants how to use CU*BASE tools, function keys, categories and other search filters necessary to operate the CU*BASE system, regardless of the user's job classification.

Audience

This course is designed for the beginning CU*BASE user.

Objectives

By the completion of this course, participants will be able to:

- Log in to the CU*BASE system
- Explain the layout of a standard keyboard
- Navigate to various CU*BASE tools
- Explain the basics of the CU*BASE home page
- Identify and explain CU*BASE toolset controls
- Identify key CU*BASE tool categories
- Identify key CU*BASE tool types
- Identify key CU*BASE tool shortcuts

Topics Covered

- Accessing CU*BASE online help
- Keys to understanding CU*BASE
- Processing tools
- Inquiry reference tools
- Update reference tools
- Report reference tools
- CU*BASE toolset controls
- CU*BASE tool categories
- CU*BASE tool types
- CU*BASE tool shortcuts
- Workstation security
- Employee security
- Introduction to Account Inquiry
- Introduction to Phone Operator
- Accessing and using Phone Operator

On-Demand Equivalents

- CNV 100: Preparing for Your Conversion to CU*BASE GOLD
- CNV 101: Leading Change
- CNV 102: Converting Your Back Office
- CTM 100: Welcome to CU*BASE GOLD
- CTM 101: CU*BASE Navigation
- CTM 102: Rate Inquiry, Loan Quoter, and the Timeout Window

0.60 CU*Spy Online Reports and Statement Retrieval

Teller/Member Service

Course length: 1 hour

Summary

This course covers the nuts and bolts of using the CU*Spy online retrieval system to work with member statements and daily credit union reports. From scanning a report for management analysis to researching an out-of-balance situation or printing a clean copy of a statement for an anxious member, CU*Spy gives everyone access to important archived information from any online CU*BASE terminal.

Audience

This course is designed for all credit union personnel, from the front line to the back office and credit union leaders and managers.

Objectives

By the completion of this course, participants will be able to:

- Use CU*Spy to view and print member statements
- Access CU*BASE daily reports through CU*Spy
- Use Find and Print features to work with reports and statement files
- List configuration and customization options available in CU*Spy
- Archive a report or Query in CU*Spy

Topics Covered

- Online member statements
- Online daily reports
- Using Find to locate items on a report
- Printing a report or statement
- Advanced options
 - Customizing the CU*Spy report view
 - Notes
 - Miscellaneous configuration options

1.00 Introduction to Teller Processing

Teller/Member Service

Course length: 1.5 hours

Summary

This course covers signing on to the teller system, cash drawer inquiry, balancing, and closing. After completing this course and course 1.01 Member Services: Account Inquiry and Phone Operator, you'll be ready to go to work!

Audience

This course is designed for supervisors and managers as well as employees needing to perform routine teller tasks. This course is also an excellent review for understanding how the teller line fits into member services.

Objectives

By the completion of this course, participants will be able to:

- Activate a teller to allow teller functions to take place
- Use Drawer Control/Audit to review and update the status of the teller drawer
- Perform routine teller transactions, including deposits, withdrawals, and transfers
- Use CU*BASE tools to balance a teller drawer
- Perform the tasks necessary to close a teller drawer

Topics Covered

- A day in the life of a teller
- Teller activation
- Cash verification
- Location verification
- Teller Drawer inquiry tool
- Noon balancing
- Teller Control
 - System totals vs. physical cash
 - Drawer-counting techniques
- Outside checks
- In-house drafts
- Reprinting receipts
- eReceipts
- Photo ID capture
- Over and short
- Closing
- Report-closing verification

On-Demand Equivalents

- CTM 400: Teller Processing 1
- CTM 900: eReceipts and Photo ID Capture

1.01 Member Services: Account Inquiry and Phone Operator

Teller/Member Service

Course length: 1.5 hours

Summary

Both an introduction and a refresher for CU*BASE users, this course concentrates on the tools that allow the user to be prepared to answer member inquiries of any type. Users are taught how working with existing accounts relates to the CU*BASE centralized database. If you have ever been stumped by members or auditors or have ever had basic research problems on your member database, this course is a must. Communication is key.

Audience

This course is designed for all credit union employees.

Objectives

By the completion of this course, participants will be able to:

- Explain the differences between Account Inquiry and Phone Operator
- Use Account Inquiry to view membership and account data
- Process general member requests such as stop payments, comments, and transfers
- Process requests such as making address changes, disbursing checks, and printing payoffs

Topics Covered

- Account Inquiry structure
 - Available features
 - Viewing account suffixes
- Phone Operator structure
 - Available features
 - Using action codes
- Using Inquiry to search for closed accounts
- Accessing teller, member service, and lending tools

On-Demand Equivalents

- CTM 200: Member Inquiry
- CTM 201: Phone Operator
- CTM 300: Opening Memberships & Accounts
- CTM 900: eReceipts and Photo ID Capture

1.20 Teller Techniques and Shared-Branching Options

Teller/Member Service

Course length: 1.5 hours

Summary

This course takes a detailed look at the functions available in CU*BASE that assist staff in delivering superior service to members. The course uses service examples and tips that allow users to work with almost any member request without leaving the teller-processing area. This course also takes a special look at how credit unions can form shared-branching alliances using CU*BASE.

Audience

This course is designed for tellers and line personnel who have been working with members using CU*BASE for at least four to six weeks.

Objectives

By the completion of this course, participants will be able to:

- Process basic member requests
- List tips on navigating the CU*BASE Teller Processing system
- List CU*BASE shared-branching options
- Identify tools and skills required to be a complete financial service representative working the teller line
- Explain member service workflow options

Topics Covered

- Member dialogue in unison with CU*BASE functions
- Funds in Control
- Posting options
- Check-cashing options
- Funds-forward options
- Using process codes
- Miscellaneous Receipts options
- Reprinting receipts
- eReceipts
- Photo ID capture
- Phone Operator access
- Over-the-counter fee options
- Access to opening and closing memberships/accounts and Rate Inquiry
- Shared-branching access
- Understanding the teller's role in the credit union communication chain
- Online CTR forms

On-Demand Equivalents

- CTM 401: Teller Processing 2
- CTM 900: eReceipts and Photo ID Capture

1.30 Head Teller Vault/Change Fund Management

Teller/Member Service

Course length: 1 hour

Summary

This course is based on the management of the change fund and its daily cycle. The course covers selling, buying, and transferring cash to and from both the bank and tellers. Topics include tips on balancing the change fund, helping tellers balance cash drawers, and reducing non-earning cash volumes. Special attention is paid to member-correction and teller-line adjustments.

Audience

This course is designed for lead tellers, head tellers, and cash managers. It's also a great cross-training course for accounting and audit control personnel.

Objectives

By the completion of this course, participants will be able to:

- Use CU*BASE tools to balance a vault
- Perform teller cash/vault buy/sell
- Perform vault cash/bank buy/sell
- Perform a teller-drawer adjustment
- Perform a member account adjustment

Topics Covered

- Vault balancing and inquiry
- Drawer purchase/sell
- Vault purchase/sell
- Audit keys and teller audit
- Miscellaneous Receipts Report
- Drawer correction
- Transaction reversal
- Account adjustment vs. transaction reversal
- Posting cash over/short
- Teller-closing reports
- Vault reports and inquiry
- Change fund reports and inquiry
- Posting coded and full account adjustments
- TCD/TCR inquiry

1.40 Day-to-Day Certificates

Teller/Member Service

Course length: 1 hour

Summary

The course gives special attention to the management of certificates – from selling, to redeeming, to maintaining certificates throughout a normal member-service day. The automated cycling of certificate products and member requests will be covered in great detail.

Audience

This course is designed for all personnel involved in selling, maintaining, tracking, and marketing certificate products. It is a good cross-training course for marketing and product development personnel.

Objectives

By the completion of this course, participants will be able to:

- Explain how to purchase a certificate
- List key marketing features such as bonus rates, rollover services, and balance control
- Perform certificate-maintenance tasks
- Complete certificate redemption and renewal procedures
- Identify alternative certificate products such as variable-rate, multiple-deposit, and principle-distribution certificates
- Define rate quoting
- Explain the difference between base rates and APY

Topics Covered

- CD creation/transfers
- CD Rate Inquiry and APY Calculator tools
- Joint ownership
- Dividend-posting options
- Renewal incentives
- Full vs. partial redemption
- Penalty codes and calculators
- IRA options
- Maturity options: allowing members to change in **It's Me 247**
- Fixed- vs. variable-rate products
- Certificate-interactive deposits (ACH/payroll)
- Planning, scheduling, and calculating certificate rates
- Automated certificate-check processes
- Credit union-defined laser certificate forms
- Bump-rate certificates

1.50 Day-to-Day Savings Products

Teller/Member Service

Course length: 1 hour

Summary

The course concentrates on the ancillary savings products that can set a credit union apart from the local market's savings offerings. Topics covered include how savings products interact with other key products such as audio response, messages and comments, and overdraft protection.

Audience

This course is designed for all personnel involved in selling, maintaining, tracking, and marketing saving products. It is a good cross-training course for marketing and product development personnel as well.

Objectives

By the completion of this course, participants will be able to:

- List savings products available through a single membership
- Use CU*BASE tools to track open and closed memberships/accounts
- Use CU*BASE tools to track member comments and messages
- List the uses of overdraft-protection products
- Describe the connection between relationship management and single account types
- Explain the difference between transaction account types and traditional savings products

Topics Covered

- Opening additional share types
- Overdraft protection concepts
 - Setup
 - Maintenance
- Automatic transfers and control options
- Comment tracking
- Joint ownership
- Rate Inquiry and APY Calculator tools
- Audio-response interface
- Policies and potential options for fees
- Planning, scheduling, and calculating share rates
- Automated share check processes

1.60 Day-to-Day IRAs

Teller/Member Service

Course length: 1 hour

Summary

This course concentrates on frontline products and their correlation to IRA management. Topics covered include IRA Inquiry, Teller Posting, payroll, and more. The course also covers reporting, forms, and other IRS-related issues handled by CU*BASE.

With the changes to the IRA processing rules and the Roth IRA types, there is a continuing interest in IRAs with today's financial service consumer: your member.

Audience

This course is designed for all personnel involved in the general management of IRA account types.

Objectives

By the completion of this course, participants will be able to:

- List CU*BASE IRA reporting options and interfaces to outside IRA administrators
- Identify CU*BASE posting options that can be used for member-service requests
- Identify self-directed IRA alternatives
- Explain IRA opportunities and rules
- Use CU*BASE IRA functions

Topics Covered

- IRA posting codes and CU*BASE options
- IRA reporting options
- IRA savings products
- IRA certificate products
- HSA products
- Managing an IRA using both savings and certificate products
- Understanding CU*BASE IRA Inquiry tools
- Posting penalties and dividend withholding
- Minimum withdrawal processing
- IRS policies and form requirements
- Working with outside administrators
- IRA-beneficiary setup and payout
- Automated IRA distributions/checks

1.70 Day-to-Day Loan Servicing

Teller/Member Service

Course length: 1 hour

Summary

This course concentrates on the general servicing of loans as related to front-line personnel. The course will focus on working with both posting and inquiry tools to fulfill member requests. Detailed lending and loan options are covered in Lender*VP courses.

Audience

This course is designed for all personnel involved in handling day-to-day member-loan services. This course specializes in working with non-loan personnel and the way they relate to loan issues, and it is key to helping loan managers understand how to communicate with other departments.

Objectives

By the completion of this course, participants will be able to:

- Perform key loan-servicing tasks such as posting payments and reviewing general inquiry information
- Explain how the lending department can best communicate member loan needs to other key departments
- Identify key CU*BASE collections and memo products
- Identify CU*BASE delinquency tools
- Describe the appropriate response to member delinquency
- Identify CU*BASE cross-sales tools
- Explain the differences among key loan products

Topics Covered

- Loan Quoter and getting the member started
- Understanding loan inquiries and account status
- Working with delinquency flags and other collections tools
- Responding to a delinquent member
- Posting loan payments
- Working with a written-off loan
- Loan adjustments and transaction reversals
- Understanding member payment options (AFT, ACH, payroll)
- Understanding member notices and print cycles
- Introduction to Trackers and memo functions

1.80 Teller Cash Dispensers, Recyclers, and CU*BASE

Teller/Member Service

Course length: 1.5 hours

Summary

This course will review the differences in TCD's and TCR's as well as the daily activities for which vaults are used. Topics covered include the daily interface with CU*BASE, balancing procedures, and how to use the TCD/TCR to perform transactions and cash transfers.

Audience

This course is designed for all staff using TCD's or TCR's for transactions, auditing, and balancing.

Objectives

By the completion of this course, participants will be able to:

- Explain the difference between TCD's and TCR's
- Perform daily activities related to TCD's and TCR's
- List procedures for balancing and replenishing cash
- Research out-of-balance situations

Topics Covered

- The differences between TCD's and TCR's
- Understanding middleware
- Daily activities
- Auditing
- Performing teller transactions and cash transfers
- Replenishing cash
- Balancing
- Handling error messages

2.00 CU*BASE Employee Security

Supervisory/Management

Course length: 1 hour

Summary

CU*BASE security is designed to protect both the credit union and the employee. By limiting an employee's access to certain areas, errors are curtailed and credit union leaders are reassured that their employees are above suspicion. This course concentrates on the ability to control credit union employee access to CU*BASE and is a must for any credit union staff needing to prepare for an IT audit.

Audience

This course was designed specifically for the staff member who has been designated as the credit union's CU*BASE security officer. It may also be helpful for top-level managers who would like to develop an overall strategy for staff access to CU*BASE tools.

Objectives

By the completion of this course, participants will be able to:

- Develop an effective credit union security policy
- Implement CU*BASE compliance tools
- Identify CU*BASE job category tools
- Explain how CU*BASE security can lead employees in their daily functions through multiple entry points

Topics Covered

- Auto Security
- Job descriptions/classifications
- Employee profiles
- Tool security
 - Tool assignments
 - Special security
 - Assign/delete options
- Copy functions
- Password management
- Controlling key member functions by member account type
 - Inquiry options
 - Phone Operator options
 - Inquiry vs. posting vs. maintenance
- Using employee security report options
- Data center employee security
- CU*Answers password-reset policy
- Best practices on auditing employee activity
- User ID information and history

2.10 Designing Savings and Certificate Products

Supervisory/Management

Course length: 2 hours

Summary

This course concentrates on the general structure of CU*BASE savings and certificate products and their optional configurations. This course will help the marketer create more attractive products and the controller create more cost-effective and targeted products. Understanding what you sell is the key to productive sales.

Audience

This course is designed for operations management, marketing staff, and financial analysts and is a good cross-training course for day-to-day supervisors.

Objectives

By the completion of this course, participants will be able to:

- Describe the structure of CU*BASE savings products and how to configure independent savings offerings
- List CU*BASE certificate-control options
- List the differences between certificate applications and types
- Identify accounting and compliance tracking tools
- Explain optional timing cycles and their effect on dividend processing and member perceptions
- Identify key CU*BASE marketing options for enhanced certificate products

Topics Covered

- Dividend applications vs. CU*BASE-product applications
- Required general ledger interfaces
- Dividend-calculation tools
- Dividend-payment tools
- Dividend-rate tools
- New qualified dividends
- Uses for and configuration of multiple account suffixes
- Split rates and plateau options
- Club-account indicators
- Application vs. certificate type
- Certificate-penalty calculations
- Variable-rate options
- IRA options
- HSA options
- Rollover options
- Bonus rates
- Dormancy
- Automated-fee options
- Demographic clubs and fee interaction
- Average-balance calculations

2.11 Introduction to Miscellaneous Member Account Forms

Supervisory/Management

Course length: 2.5 hours (1-hour training, 1.5-hour lab)

Summary

This course is a must for credit union staff who want to design automated member forms in laser-quality format. This course will introduce participants to CU*BASE miscellaneous member account forms. The first hour will include training on the software and how it can be used with various types of forms. The remainder of the course will be a lab environment where participants can work on individual projects.

Audience

This course is designed for credit union staff responsible for managing the selection, maintenance, and implementation of credit union forms.

Objectives

By the completion of this course, participants will be able to:

- List the uses of miscellaneous member account forms
- List the steps required for creating, editing, printing, and linking forms to credit union products
- Create a member account form

Topics Covered

- Configuring miscellaneous member account forms for savings, certificate and loan-product communications
- Creating paragraphs
- Pulling in membership and account details
- Linking forms to credit union products
- Printing forms

2.21 It's Me 247 Online Banking

Supervisory/Management

Course length: 1.5 hours

Summary

This course will cover member self-service financial products, which continue to dominate the development of technology, based on the convenience, the relevance to the lifestyle of today's member, and the efficiencies gained by the credit union.

Audience

This course is designed for credit union leaders and other staff members responsible for the management and delivery of credit union online banking products.

Objectives

By the completion of this course, participants will be able to:

- Explain online banking from the member's perspective
- Explain how to best promote audio and online banking to credit union members
- Use online banking as an additional delivery channel for all credit union services
- List online banking configuration options
- Set up Internet member services for delivery to members
- List CU*Answers mobile web and mobile text products

Topics Covered

- Online banking features, fees, and services
- Security features and strong passwords
- Internet member services
 - Share, CD, and loan rate board
 - Selling products online
 - Membership and loan applications
 - Viewing checks online
 - Contact request and personal information update
 - A2A transfers
- Online ballots
- Audio/online banking usage statistics
- CU*Answers marketing assistance
- OTB products available online
- "See" and "Jump" functionality

Workshop

Course 2.21(W) is a workshop follow-up that allows you to work with CU*Answers staff to configure your credit union Internet member services. Please be prepared with an outline of your plan, including the settings desired for each product. For this workshop, your credit union security officer will need to grant you access to the following tool categories/types:

- Member Service Tools (MBRSRV)
- Configuration Functions (CONFIGS)
- Lending/Loan Account Tools (LOANS)
- Active Beta Development (ACTIVEBETA)
- Management Forecasting Tools & Reports (FORECAST)
- Misc. Back Office Tools (MISC-OTHER)

2.25 Providing Added Security in Online Banking with the Personal Internet Branch

Supervisory/Management

Course length: 1.5 hours

Summary

If you need to implement additional authentication features for **It's Me 247** Online Banking, this course is for you. The Personal Internet Branch (PIB) provides a layered-security approach to add additional authentication controls for online banking. PIB is an independent application that provides multiple configurable controls that govern how online banking behaves and what members can do in online banking.

PIB allows your members to control access to their accounts via feature-access, day-of-week, time-of-day, and even geographic-location controls. It layers additional passwords and member authentication internal to online banking.

Audience

This course is designed for credit union leaders, compliance officers, and other staff members responsible for the management and delivery of credit union online banking products (support, maintenance and education).

Objectives

By the completion of this course, participants will be able to:

- Explain the layered security approach
- List methods that can be used to roll out PIB
- Identify the multiple controls in PIB

Topics Covered

- Configuring and activating PIB
- Setting up and modifying PIB profiles in CU*BASE
- Using the PIB Profile online tool
- How PIB affects **It's Me 247** Online Banking
- Supporting PIB
- Reviewing PIB activity and security alerts
- Developing a rollout plan

2.30 Rate Maintenance & CU*BASE Tools for Pricing Products

Supervisory/Management

Course length: 1 hour

Summary

This course describes the different CU*BASE processes that are available for controlling the rates for credit union products. From using APY calculators to recording rate-change history and performing TIS “what if” analyses, the CU*BASE package is ready to help every credit union manager in controlling rates in a more professional and documented method.

Audience

This course is designed for operators, marketing staff, and financial analysts, and is a good cross-training course for supervisors.

Objectives

By the completion of this course, participants will be able to:

- Identify savings, certificate, and loan rate-calculation formulas and options
- Explain how to match key products with rate options
- List rate options that can be used when working with members on the front line
- Identify methods for tracking rate history and analyzing ALM results
- Explain how to use date-calculation and rate tools in working with member exceptions and cross-selling opportunities

Topics Covered

- Rate Inquiry
- APY calculator
- Dividend Quoter
- Rate-history tables
- General ledger income and expense history
- Dividend-estimation tools
- Accrual-verification tools

2.40 Variable-Rate Products and CU*BASE Tools

Supervisory/Management

Course length: 1 hour

Summary

This course offers a review of the different CU*BASE variable-rate control features for both certificate and loan products. The course will review how to develop long-term variable-rate strategies, the use of indexes, disbursement catalysts, and incremental and full-rate variable methods. Understanding all the CU*BASE options for designing effective programs and products is key to selling variable-rate products to members.

Audience

This course is designed for operators, marketing staff, and financial analysts, and is a good cross-training course for supervisors.

Objectives

By the completion of this course, participants will be able to:

- Explain the differences among group, contract, and update variable-rate types
- Explain the difference between traditional variable-rate products and LOC-disbursement variable-rate codes
- Explain variable-rate cycles, payment changes, and notices
- Explain how to effectively communicate loan changes to members
- Identify certificate variable-rate tools
- Explain automated scheduling as it relates to behind-the-scenes rate changes
- List CU*BASE index features for variable-rate control
- Explain traditional adjustable-rate-mortgage (ARM) lending and its effectiveness in CU*BASE credit unions

Topics Covered

- Variable-rate code configuration
- Index code configuration
- Scheduling variable-rate changes
- Monitoring variable-rate codes
- Controlling variable rates at loan creation
- Using variable rates as pricing controls
- Marketing variable-rate loans
- Marketing variable-rate certificates
- Analyzing the ALM effect of variable-rate loan and CD portfolios

2.50 CU*BASE Operations

Supervisory/Management

Course length: 1 hour

Summary

This course concentrates on the credit union's day-to-day usage of the CU*BASE software. From spool-file management to data retention, this course helps the operations manager understand what, when, and how things are going to get done.

Audience

This course is designed for operations management and line supervisors for both online and self-processing credit unions. It is also geared toward credit union personnel responsible for implementing periodic processing involved with end-of-day, end-of-month, end-of-year, and special requests.

Objectives

By the completion of this course, participants will be able to:

- Explain the CU*BASE operations cycle
- Identify CU*BASE reporting options
- List CU*Answers print services
- Define parameters for special requests, including billable services
- Develop a daily operational guide for the processing credit union
- List CU*Answers data-retention and disaster-recovery services, as well as credit union responsibilities related to these services

Topics Covered

- Beginning-of-day and end-of-day content and timing
- Periodic processing, including dividend and service-charge processing
- Transmission processing, including ACH, ATM, and debit card
- Insurance posting
- Tape processing, including payroll, insurance, marketing labels, and credit bureau
- Statement processing
- General ledger interface
- Tax reporting and other year-end issues
- Billable services
- Report generation
- OUTQ, spool, and writer control
- Online-report data retention
- Disaster-recovery services
- CU*Answers hours of operation and key periodic events
- Support options

2.60 CU*BASE Management Tools: A Window to Day-to-Day Credit Union Activity

Supervisory/Management

Course length: 1.5 hours

Summary

This course focuses on two key CU*BASE tool categories that give credit union leaders a window into their operations: Active Beta Development (ACTIVEBETA) and Forecasting Tools & Reports (FORECAST). Participants will get a look at how to audit, review, and find the answers to key credit union issues using multiple CU*BASE inquiry options. Understanding the results of your staff's day-to-day work and how they can interact with leadership decisions is a large component of this course. From the need to interactively use the data to providing compliance supervision, this tool category is a credit union leader's best friend. CU*Answers hopes that by teaching you how to review the results, you'll become interested in knowing how to predict the results using CU*BASE configuration and design tools.

Audience

This course is targeted at top-level management staff but can be a key tool for any credit union leader, from a supervisor to a vice president.

Objectives

By the completion of this course, participants will be able to:

- Explain the uses of CU*BASE security and rate-control tools
- Explain the dividend-rate and certificate-forecasting models and how they can improve management decisions
- Perform various department inquiries
- Identify database opportunities for both day-to-day and analytical use

Topics Covered

- Employee security
- Rate management and control
- Dividend forecasting
 - Base rate
 - Split rate
 - Plateau rate
- Certificate-redemption forecasting
 - Windfall expense
 - Holding the rate line
- Department inquiries
 - File maintenance
 - General ledger and financial review
 - Credit union property and vendor review
 - Collections review
 - SEQ/sponsor management
 - AIRES
- Other tools of interest

2.80 Member Fees and Bundled Services

Supervisory/Management

Course length: 1.5 hours

Summary

CU*BASE contains many marketing and relationship-management tools that can have a very positive effect on how credit unions view the use of member services and fees.

How can the credit union create operating revenue by offsetting direct-operation expenses elected by the member? This course concentrates on configurable service charges and member fees and the interactive product offers associated with each. How, why, and when is a member's fee being considered along with the member's entire credit union relationship? This course can make a difference in the bottom line.

Audience

This course is designed for credit union leaders responsible for cost accounting and bottom-line results. Marketing should have a great deal of input into this area.

Objectives

By the completion of this course, participants will be able to:

- Explain the power of understanding and managing member relationships
- Explain the effects of cost-accounting behavioral-fee implementation
- Identify CU*BASE configurable fee options
- Explain how to best motivate board members and staff to accept cost-accounting fees

Topics Covered

- General share configured fees
- NSF overdraft transfer configured fees
- Dormancy fees
- Regulation D fees
- Credit union-defined fees
 - Minimum balance, transaction, account
- Over-the-counter fees
 - Check-cashing fees, credit union check-printing fees, money order-printing fees, deposit-item fees
- Demographic groups and club management
 - Electronic waivers
 - Generating income
- Bundled services and fee incentives
- Rated member returns with tiered benefits
- Relationship-management tools
- Understanding the pros and cons of relationship management: keeping your goals straight

2.95 CU Budget and Strategic-Planning Tools

Supervisory/Management

Course length: 1.5 hours

Summary

This course reviews the credit union's ability to calculate, review, and report budget information. CU*BASE builds a continual analysis from month to month, quarter to quarter, and year to year for the balance sheet, income statement, and budget variance.

Through a consistent configuration and organized structure, CU*BASE can build new budgets and plans, and give the creative manager several different views of the credit union's financial performance. With more than 99 configurable reports, the manager can divide the budget process down to a very workable and manageable task.

Audience

This course is designed for credit union accounting leaders and top finance staff such as CFOs.

Objectives

By the completion of this course, participants will be able to:

- Explain the database structure of both general ledger financials and historical sets of information
- Explain the CU*BASE financial package
- Identify options for budget modeling, creation, and reporting

Topics Covered

- Balance-sheet creation
- Income-statement creation
- Report design
- Understanding the GLBALA file
- Automated budgeting through financial-history projections
- Tweaking the budget by using individual-line-item control
- Two credit union income statements that work as one
 - Rate-affected income statement
 - Operational non-rate-affected income statement
- Projecting budgets for assets, liabilities, and income and expenses as one or separately
- The value of a complete budget

2.96 Using AnswerBook to Find Answers and Track Staff Questions

Supervisory/Management

Course length: 1 hour

Summary

This course will provide an overview of AnswerBook, a CU*Answers tool designed to help you get quick answers to your questions anytime anywhere. The comprehensive Q&A database, or “knowledge base,” is part of our effort to make sure that every credit union employee has direct access to the information they need to serve members. Not only can you scan multiple categories for the most commonly asked and answered questions, you can also submit your questions to be answered by a CU*Answers Expert.

Audience

This course is designed for all credit union employees.

Objectives

By the completion of this course, participants will be able to:

- Access AnswerBook using a variety of methods
- Find answers in AnswerBook
- Review past questions in AnswerBook
- Track credit union client support activity in AnswerBook

Topics Covered

- Opening AnswerBook
- Finding answers
- Asking questions
- Reviewing previous questions
- Receiving email notifications of AnswerBook responses
- Tracking credit union help-desk activity

3.00 Introduction to Accounting

Accounting/Back Office

Course length: 1 hour

Summary

This course concentrates on the daily accounting that CU*BASE processes based on the credit union's daily operations. Topics range from the day-to-day accruals of income-and-expense items to the balancing of the change fund. Special emphasis is placed on daily-balancing procedures, troubleshooting, and miscellaneous configuration options.

Audience

This course is designed for accounting supervisors and general accounting personnel.

Objectives

By the completion of this course, participants will be able to:

- Explain the differences between CU*BASE accounting concepts and general ledger tools
- Explain the daily cycle of information and its corresponding accounting entries
- Explain accounting principles related to income-and-expense accruals and their effect on the accounting department
- Create an outline for an organized accounting approach

Topics Covered

- Beginning-of-day and end-of-day processing
- Member accounting
- Vendor accounting
- Corporate accounting
- Differences between financial and subsidiary analysis
- Accounting rules of thumb
 - o Daily income and expense
 - o Cash movement
- Managing the cash/vault system
 - o Physical cash
 - o Teller system
 - o Member/general ledger system
- Queries and key reports
- The *Member Communication Tools* category (COMM) and data retention
- Understanding the "TR" journal entry
 - o Trans audit
 - o General ledger control
 - o GHIT vs. transaction-generated entries
- Understanding clearing, suspense, and settlement accounting

3.10 Introduction to General Ledger Tools

Accounting/Back Office

Course length: 1.5 hours

Summary

This course concentrates on the tools used by the accounting department to manage the general ledger and its tracking of the credit union's accounting. These tools include the development of a chart of accounts, reporting system, and online review.

Audience

This course is designed for accounting supervisors and general accounting personnel.

Objectives

By the completion of this course, participants will be able to:

- Explain the structure and detail necessary to create an effective general ledger system
- Identify CU*BASE chart-of-accounts options
- Compare and contrast credit union controls and CU*BASE functions

Topics Covered

- Posting to the general ledger
- Maintaining and developing a chart of accounts
- Working with online inquiries
 - Credit union financials
 - Credit union check register
 - General ledger history
- Introduction to general ledger reports and print options
- Developing posting templates

On-Demand Equivalent

- CAB 100: CU*BASE General Ledger 1

3.15 Advanced General Ledger

Accounting/Back Office

Course length: 1.5 hours

Summary

Are you ready for the next level of understanding CU*BASE general ledger tools? Do you know how to use all the reports that are generated on a daily basis? Need some tips on finding and solving balancing challenges? This course expands on the basic information introduced in course 3.10 Introduction to General Ledger Tools.

Audience

This course is designed for credit union accounting personnel responsible for daily balancing tasks.

Objectives

By the completion of this course, participants will be able to:

- Identify daily reports that can be used in balancing and monitoring general ledger activity
- Use various CU*BASE balancing and tracking tools
- Add new general ledger accounts to the chart of accounts

Topics Covered

- Journal entry templates
- Chart of accounts maintenance
- Budget overview
- General ledger closing
- 90-day-delinquent loan interest
- Smart Operator review
- Advanced general ledger history inquiries
- Trial balance general ledger verification
- Vault general ledger verification
- Printing monthly general ledger history for account range
- Advanced general ledger
- Printing general journal or history (daily)
- Printing TR-system journal analysis
- Member Account Adjustment Report
- General Transaction Report
- CU*Spy reports

3.20 Balancing Made Easy

Accounting/Back Office

Course length: 1 hour

Summary

This course reviews the contents of the *Balancing Made Easy* booklet.

Audience

This course is designed for accounting supervisors and general accounting personnel.

Objectives

By the completion of this course, participants will be able to:

- List daily balancing procedures recommended by CU*Answers
- List daily processing activities for share draft, ACH, and ATM vendors
- Find general ledger account offages, as well as solutions to the offages
- List end-of-month activities, including the call report

Topics Covered

- Printing reports
- Daily-balancing procedures
- ACH-processing activities
- Draft-processing activities
- Corporate-draft/money-order reconciliation
- ATM/debit card activities
- Monthly dividend/interest-accrual Processing
- End-of-month activities
- Call report
 - o CU*BASE reports available

3.25 SRS Bookkeeping Services – Sharing Our Policies and Procedures

Accounting/Back Office

Course length: 1 hour

Summary

This course reviews SRS Bookkeeping Services policies and procedures for performing draft- and ACH-exception processing. It also goes through the step-by-step flow of the run sheets used to complete a day's work following the recommended guidelines in the *Balancing Made Easy* booklet.

Audience

This course is designed for accounting supervisors and general accounting personnel.

Objectives

By the completion of this course, participants will be able to:

- Explain share draft-, ACH-, and ATM-exception policies and procedures used by SRS clients
- List the daily run sheets used to complete a day's work for an SRS credit union client
- List the services offered by SRS

Topics Covered

- Share-draft-exception policies and procedures
- ACH-exception policies and procedures
- ATM-exception policies and procedures
- SRS run sheets for daily credit union procedures
 - Print reports
 - Work exceptions
 - Post settlement/return amounts to general ledger
 - Reconcile ATM/debit card/online credit card vendors
 - Reconcile 739.00/LGLACT
 - Review EOD exception reports
- List of services offered by SRS Bookkeeping Services
- Enhancements requested by SRS Bookkeeping Services

3.26 5300 Tools: Call Report Techniques from Xtend SRS

Accounting/Back Office

Course length: 1.5 hours

Summary

This course shares proven methods that Xtend SRS uses when they complete 5300 Call Reports for their clients. Hear tips from experts on restructuring your configurations, developing new report formats, and making decisions that could make your prep for the 5300 easier and more efficient.

Audience

This course is designed for staff who participate in the creation of the quarterly call report.

Objectives

By the completion of this course, participants will be able to:

- Identify CU*BASE tools that help create the call report
- List CU*BASE reports that contain the data needed for reporting
- List time-saving efficiencies
- Explain the SRS Bookkeeping process used to complete a call report for a client

Topics Covered

- Creating the 5300 financial statement
- Creating a legend/mapping of your loan products
- Configuring the call-report data on CU*BASE (starting with the previous quarter)
- Creating 5300 Call Report instructions
- How to improve the amount of review time it takes you each quarter
- 5300 Call Report definition
 - Give to auditors
- Statistical reports
 - Member trial balance
- Loan-information reports
 - Trial balance
 - Delinquency
 - Rate analysis
- Reading the report in CU*Spy

3.30 Credit Union Checks and Accounts Payable

Accounting/Back Office

Course length: 2 hours

Summary

This course concentrates on issues related to printing and tracking credit union checks. Topics covered include setup and configuration of the credit union checking accounts, independent print options, using accounts-payable processes, and check-reconciliation options.

Audience

This course is designed for accounting supervisors and general accounting personnel.

Objectives

By the completion of this course, participants will be able to:

- Explain the relationship between credit union banking accounts and the flow of funds through the general ledger
- Identify the tools and information needed to reconcile a bank statement
- Identify check-printing options
- List the three types of CU*BASE checks and explain their differences
- Explain the importance of using a database tool such as the accounts-payable system to maintain spending history and budgeting records for credit union leaders

Topics Covered

- Accounts payable
 - General setup
 - Vendor relationships
 - Check flow
 - Inquiry and reporting
- Bank reconciliation
 - Printing the check register
 - Understanding the void process
 - When to reprint a check
 - Using money orders
 - Automated reconciliation
 - Manual reconciliation
- 739.xx general ledger sweeps for credit union checks vs. in-house checks
- Laser-check options
- Money-order options
- Multiple bank IDs and control totals
- Teller/member checks
- Miscellaneous checks
- “Smart” checks

3.40 Credit Union Financials: Configuration, Printing, and Other Options

Accounting/Back Office

Course length: 1.5 hours

Summary

This course will concentrate on the structure and basic outline of the credit union's chart of accounts and financials: balance sheet and income statement. CU*BASE allows 99 reports per chart of accounts, and the printing of up to eight columns of side-by-side period analysis. From day-to-day balancing to board-packet preparation, knowing how to get the right information is critical.

Audience

This course is designed for accounting and financial managers.

Objectives

By the completion of this course, participants will be able to:

- Use CU*BASE development tools to create and print credit union financials including balance sheets and income statements
- Explain how CU*BASE financial reports can be used in conjunction with detailed accounting reports
- Explain how to export financials
- Identify report output options

Topics Covered

- Understanding the need for multiple formats of key accounting reports
- Balance sheet
 - Board format
 - Membership format
 - Trial-balance format
 - Budget format
- Income statement
 - Month end
 - Year end
 - Quarterly
- General reports
 - Non-earning assets
 - Daily-reconciling reports
 - Departmental reports
- Designing reports using course examples
- 5300 financials

3.50 General Ledger Subsidiary Products: Fixed Assets & Prepaid and Accrued Expenses

Accounting/Back Office

Course length: 1.5 hours (4-hour lab by request)

Summary

This course reviews the advantages of a fully integrated subsidiary system for fixed-asset, prepaid-expense, and accrued-expense accounting. From disaster recovery to immediate inquiry, the course will concentrate on how the accounting department can communicate the accounting of these key expenses.

The training portion of the course will outline the steps for getting started and the preliminary planning required for the implementation phase. The lab will allow participants to actually create their fixed-asset, prepaid-expense, and accrued-expense records in their credit union's files.

Audience

This course is designed for accounting supervisors and general accounting personnel who are not currently using subsidiary processing in CU*BASE.

Objectives

By the completion of this course, participants will be able to:

- List advantages of a subsidiary-ledger system that can both post and report activity as well as keep a history log for analysis and management review
- Organize a credit union subsidiary-ledger system for fixed assets, prepaid expenses, and accrued expenses
- Identify CU*BASE features related to the above-mentioned subsidiaries

Topics Covered

- Preparing for subsidiary entries
- Working with the vendor file
- Organizing general ledger codes
- Defining fixed assets
 - Building assets, land assets, fixed assets, leased improvements
- Defining prepaid expenses
- Defining accrued expenses
- Generating and posting work files
- Reporting and inquiry on subsidiary results
- Building a full database for internal and external communication of these key subsidiaries
- Minimizing general ledger account numbers required on the balance and income statement
- Maintaining inventory control using serial-number lookups and tracking
- Designing tag-number systems to identify credit union property

3.51 General Ledger Subsidiary Products: Working with Investments

Accounting/Back Office

Course length: 1.5 hours (4-hour lab by request)

Summary

This course reviews the advantages of an investment trial-balance system for the accounting and tracking of credit union investments. Investment maturity, activity, and accounting issues are all clearly communicated to all interested parties through a full inquiry and reporting system.

The training portion of the course will outline the steps for getting started and the preliminary planning required for the implementation phase. The lab will allow you to actually create your investment records in your credit union's files.

Audience

This course is designed for accounting supervisors and general accounting personnel at credit unions not currently using investment processing in CU*BASE.

Objectives

By the completion of this course, participants will be able to:

- Explain the differences between the CU*BASE trial-balance investment-reporting system and an investment-counseling system
- Develop a concise and organized approach to a credit union investment trial balance
- Identify CU*BASE tools used for communicating the who, how, when and where of credit union investment policies

Topics Covered

- Preparing investment information for entry into CU*BASE
- Organizing general ledger codes
- Organizing broker/safe-keeper/third-party relationships
- Understanding investment-income calculation methods
- Understanding premium and discount income/expense accounting methods
- Defining investment types
- Maintaining market prices
- Reporting maturity
- Minimizing general ledger account numbers required on the balance and income statement
- Reporting on and inquiry of investment results
- Credit union investment-policy compliance
- Investment-activity reports

3.60 Member Checking, Vendor Accounting, and Suspense General Ledger Accounts

Accounting/Back Office

Course length: 2 hours

Summary

This course reviews the member checking/share-draft programs, from clearing a draft to setting up an overdraft-protection plan to mailing an NSF notice. Course participants will also review the accounting of third-party products such as ACH, ATMs, and member checking accounts. The course will additionally cover the system's internal-suspense structure and how the chart of accounts can break down the most complicated process into simple zero-balance pointers. This course is a must for understanding the basic accounting of overdraft, exception, and reposting options.

Audience

This course is designed for accounting supervisors and general accounting personnel.

Objectives

By the completion of this course, participants will be able to:

- List the daily, weekly, and monthly cycles of key vendor products such as ACH, ATM, and share drafts
- Explain the CU*BASE functionality of automatically handling member exceptions according to credit union policy
- Identify the posting steps involved in each vendor process and how those posting steps are reflected in the accounting entry "TR"
- Configure CU*BASE options to reflect credit union policies as to check/share draft products

Topics Covered

- Clearing accounts
- Suspense accounts vs. origination points
- Settlement accounts and their reconciliation
- Posting sequences and their accounting summary
- Configuring exception processing and fees
- "TR" trans analysis
- Building share-draft/checking accounts
- Outlining the day-to-day cycle of receiving, posting, and settling draft files
- Understanding CU*BASE reposting options
- Corporate-check-reconciliation options
- Balancing the 870.02 Suspense Account
- Working with the 870.45 Returns Owed to Credit union account
- Balancing the credit union clearing account
- Tracking electronic debits, reversals, and final settlements

3.62 Member Payroll and ACH Products

Accounting/Back Office

Course length: 1.5 hours

Summary

How can I make the screen display match the select employee group's payroll report? How can a member who is moving from a paper payroll have his/her automated payroll transfers converted to ACH distributions? How can a credit union debit from a third-party vendor hit the credit union's general ledger directly? This course concentrates on the processing of member payroll and ACH items. Broken down into two parts, the course shows both the similarities and the differences between these two major services. This course is a must for both the processing employee and the management personnel responsible for improving SEG activity.

Audience

This course is designed for accounting supervisors and general accounting personnel.

Objectives

By the completion of this course, participants will be able to:

- Explain the unique role of payroll processing in the historical growth of credit unions
- Identify CU*BASE options used to build a payroll group database
- Explain the basics of the relationship a credit union has with an ACH company

Topics Covered

- Entering a payroll group
- Entering/maintaining member payroll information
- Balancing and posting a member payroll
- Tracking and inquiring on member-payroll information
- Developing an ACH company list
- Defining ACH posting rules and techniques
- Working with ACH company/member information for posting
- Understanding ACH transfers
- Working with ACH overdraft-transfer capabilities
- Using ACH as a credit union settlement tool

On-Demand Equivalents

- CAB 201: Daily ACH Processing
- CAB 202: Daily Payroll Processing

3.63 ATM Processing

Accounting/Back Office

Course length: 1.5 hours

Summary

This course discusses the processing features of CU*BASE's automated-teller-machine interfaces. This course is a must for personnel responsible for ordering cards, setting up fee programs, and coordinating the settlement. Special attention is paid to the various third-party vendors and how the credit union can maximize these special relationships.

Audience

This course is designed for accounting supervisors and general accounting personnel.

Objectives

By the completion of this course, participants will be able to:

- Explain the revolutionary effect that ATM and debit cards have had on the credit union industry
- Explain how the CU*BASE plastics file feature can communicate information to front-line personnel
- List the daily, weekly, and monthly processing cycles of a credit union ATM vendor and how these cycles affect member accounts

Topics Covered

- Plastics file
- Card creation and maintenance
- Service-charge indicators
- Working with settlement, suspense, and clearing accounts
- Understanding the difference between ATM and debit cards
- Verifying ATM transactions to vendor reports
- Understanding the differences between online, positive-balance, and negative-balance processing
- Substituting debit cards for checks

3.71 Understanding CU*BASE Transactions

Accounting/Back Office

Course length: 1 hour

Summary

In this course, participants will examine the indicators and specific fields in a CU*BASE transaction that dictate how that transaction is processed and reflected to both the member and the general ledger. This course will answer a variety of questions about CU*BASE transactions. What are the characteristics of transactions that determine their behavior in processing? How does the system know the originating source of a transaction? How does CU*BASE understand that a withdrawal needs to debit a share general ledger account? When a description is selected for a certain transaction, how can one understand the factors that caused that description to match the transaction? How can one balance an out-of-balance condition by scanning for member-offset general ledgers?

Audience

This course is designed for accounting and back-office personnel who need to know the characteristics that define transactions that need reconciling. It's also geared toward marketing staff who want insight on member-transaction activity to envision product or rebate/service-charge opportunities.

Objectives

By the completion of this course, participants will be able to:

- Identify the key controlling fields in a CU*BASE transaction record
- Use Query and transaction information to reconcile out-of-balance conditions
- Explain how key CU*BASE functions communicate transactions to members

Topics Covered

- Origin codes
- Transaction codes and types
- Primary and offset general ledgers
- Transaction Queries
- Analyzing the "TR" journal entry
- Understanding transaction dates and history files
- Working with processing times
- TRANS1, TRANS2, TRANS3
- Secondary transaction descriptions
- Account adjustments
- Transaction service charges
- Transaction overrides
- Reversals
- Effective-dated adjustments
- How to use transaction activity for branch reassignments
- How a share/loan-product configuration controls the general ledgers that are offset
- Transaction weight/cost factors

3.80 CU*BASE Data-Retention Issues

Accounting/Back Office

Course length: 1 hour

Summary

Few things are as frustrating as having to hunt through printouts to respond to an anxious member's request. Management is faced daily with the issue of balancing supply and storage costs against the need to provide examiners and auditors with legally required information. Creating and designing a policy that fits all of the different types of reports and classified information groups can be a real challenge. This course helps credit unions plan for how key information and computer-generated reports can be accessed, reviewed, and archived for credit union employees and key credit union examinations. This course will review the credit union's data-retention issues, from the teller line to management's back office. Data retention is not just a back-office issue. When a member needs a statement quickly, it is service that makes all the difference.

Audience

This course is designed for operations leaders and credit union policy makers.

Objectives

By the completion of this course, participants will be able to:

- Identify key CU*Spy features and explain their application in the daily servicing of members
- List CU*Answers procedures for CU*Spy setup
- Identify CU*Answers CD-ROM options and OUTQ processing
- Explain regulatory guidelines on data retention

Topics Covered

- CU*BASE daily reports
- CU*BASE monthly reports
- CU*BASE user reports
- CU*Spy reports and statements
- OUTQ options
- Daily-printing cycles
- Writing a data-retention policy
- CU*Spy options and credit union examination

3.95 Year-End Planning for Online Credit Unions

Accounting/Back Office

Course length: 1 hour

Summary

This course reviews the many tasks and procedures related to end-of-year and annual tax reporting. We will review the entire Year-End Processing Guide for the current year.

Audience

This course is designed for all staff responsible for completing year-end tasks.

Objectives

By the completion of this course, participants will be able to:

- List critical deadlines for year-end processing
- List procedures for year-end processing
- List year-end verification tasks

Topics Covered

- Task list
- Tax forms and pricing
- Using member statements as Substitute 1099-INTs
- Bonus dividends and loan-interest rebates
- Verification
 - Loan categories (1098 reporting)
 - Shares and CDs (1099-INT reporting)
 - A/P vendors (1099-MISC reporting)
 - IRA balance file
 - The tax file and printing the 1099/1098 tax report
- IRAs
 - Form 1099-R instructions (CMG administered)
 - Form 5498 instructions (CMG administered)
 - Form 5498 instructions (self-administered)
- Other forms

3.96 Preparing for Multi-Corporation Processing

Accounting/Back Office

Course length: 1 hour

Summary

The multi-corporation processing feature in CU*BASE gives you the ability to run multiple credit unions in one database, identifying each with a unique corporate ID and allowing for a separate set of books to be maintained for each corporation.

Are you considering using the CU*BASE multi-corporation processing option? If so, this course is for you.

Audience

Credit union leaders and managers responsible for processing decisions. CFOs should also attend.

Objectives

By the completion of this course, participants will be able to:

- Explain how multi-corporation processing works
- Identify configuration options for networking
- Identify routing and account numbers used in multi-corporation processing

Topics Covered

- Multiple charts of account
- Financial statements
- Configurations
- Cash handling
- Tiered Services
- Rates
- Corrections/adjustments
- Opening accounts
- Third-party interfaces
- Credit bureaus
- CPI reporting
- Plastics
- Member communication

4.00 CU*BASE Data Structure: Understanding Computer-Stored Data

Marketing/Sales

Course length: 1 hour

Summary

This course focuses on key data and the way it is stored, updated, and used to understand the credit union's makeup and special features. This course identifies the three groups involved in database management: data gatherers and input specialists, data analyzers, and data users. Which are you? Where does your department fit in? If you follow the adage that "*bad* information is worse than *no* information at all," your credit union needs to understand the ins and outs of how CU*BASE uses the data making up your credit union.

Audience

This course is designed for credit union leaders involved in general management and product creation.

Objectives

By the completion of this course, participants will be able to:

- Explain the value of a centralized database as a communication tool
- Explain the value of at-your-fingertips information in developing products and cross-selling them
- Complete an outline of all key data files used by CU*BASE to process member activity
- Explain the results of database management

Topics Covered

- Terms related to data files
 - Libraries
 - Files
 - Records
 - Fields
- Key CU*BASE data files and their use
 - MASTER
 - MEMBER
 - TRANS
 - Miscellaneous
- Developing a database-management policy
 - Input
 - Analysis
 - Users
- Relating member services to the database
 - Account Inquiry/Phone Operator
- Understanding which files are being used in key CU*BASE processes

4.10 Introduction to CU*BASE Marketing & Sales Tools

Marketing/Sales

Course length: 1 hour

Summary

Have a product to sell? An announcement to make? Need to quickly contact your entire membership? Now what? CU*BASE marketing tools help users manage the sales portfolios of products, staff members, and the credit union itself. This means that the credit union must consciously adopt a communications culture dedicated to serving members and winning them over every time there is a member interaction. In this way, every credit union leader and team member will be involved in marketing, and everyone will be accountable for achieving results. Concepts learned in this course will support a credit union's strategies for reaching members and fulfilling their needs and financial goals.

Audience

This course is designed for credit union marketing personnel and all credit union leaders, from supervisors to CEOs.

Objectives

By the completion of this course, participants will be able to:

- Identify CU*BASE marketing tools that can be used to create an effective marketing campaign
- Identify interactive CU*BASE tools that support a sales-based culture
- Explain how to use the Member Connect tool
- Explain how to use the Sales Tracker system as it relates to sales opportunities and conversations
- Explain the basics of need groups and task categories within the Sales Tracker system

Topics Covered

- Member Connect
 - How to obtain a target audience
 - eCommunications: online banking messages and email
 - Print: mailing labels and selective statement inserts
 - Verbal conversation: mass Trackers for phone contact or Next Suggested Product prompt
- Cross-sales tools
 - Using the Sales Tracker system to initiate and document sales conversations with the member
 - Memo types, need groups, and task categories
 - Next Suggested Product overview
- Miscellaneous sales features
 - Member surveys: asking and documenting frontline feedback from members
 - Smart Messages: intelligent image marketing within **It's Me 247** Online Banking

Note: CU*BASE marketing programs can be utilized separately or strategically combined to meet your credit union's marketing and communication needs. Be sure to register for the following courses to take advantage of what CU*BASE can do for you:

- 4.12: Member Connect: Building a Communication Network within CU*BASE
- 4.13: Cross Sales & Sales Trackers: Offering Members Relevant Opportunities

4.12 Member Connect: Building a Communication Network within CU*BASE

Marketing/Sales

Course length: 1 hour

Summary

Member Connect is the vehicle to connect your members to your credit union quickly, regularly, and consistently. Whether your goal is to promote a new product or service, quickly blast an all-member alert, or simply keep in touch for greater member retention, Member Connect makes it easy to communicate with your members. This CU*BASE communication tool provides a single access point to powerful marketing channels available in CU*BASE, from online banking messages and emails to mailing labels and phone contacts to Next Suggested Product notes.

Audience

This course is designed for credit union marketing personnel and all credit union leaders, from supervisors to CEOs.

Objectives

By the completion of this course, participants will be able to:

- Use CU*BASE to communicate externally with groups of members as well as with the entire membership
- Identify a variety of different marketing channels for communication
- Create a simple database file of members

Topics Covered

- Creating a free-form text message to be delivered to members when they log in to **It's Me 247** Online Banking
- Sending an email message directly to a member's email address
- Printing mailing labels
- Creating a mailing-list database file ready to send to a third-party marketing resource
- Preparing for monthly or quarterly selective statement inserts targeted to certain members
- Creating telemarketing Trackers to allow member service staff to follow up with members over the phone

4.13 Cross Sales & Sales Trackers: Offering Members Relevant Opportunities

Marketing/Sales

Course length: 1.5 hours

Summary

In this course, discover how CU*BASE cross-sales tools and Sales Trackers can provide your staff with the information they need at exactly the right time and in a place that is easily accessible from member service screens.

Sales Trackers allow staff to easily review prior conversations on a topic in order to be well prepared for a related conversation with the same member. Using this tool, staff can also document the results of their member conversation, track incentives, and indicate whether future action is needed.

With CU*BASE cross-sales tools and Sales Trackers, your staff can focus their sales efforts specifically on the products and services a particular member may need. Staff can also track their own success via their personal Cross Sales Analysis dashboard.

Audience

This course is designed for credit union marketing personnel and all credit union leaders, from supervisors to CEOs.

Objectives

By the completion of this course, participants will be able to:

- Explain how CU*BASE cross-sales tools can be used to track sales opportunities for specific members
- Explain how CU*BASE Sales Trackers complement the overall member relationship
- Explain how to keep member communications consistent

Topics Covered

- Configuring and implementing the CU*BASE cross-sales tool
- Configuring and implementing the CU*BASE Sales Tracker tool
- Identifying and logging a sales opportunity
- Tracking personal employee sales success
- Understanding the Next Suggested Product tool

4.15 Member Service Trackers, Leads, and Follow-Ups

Marketing/Sales

Course length: 1 hour

Summary

In this course, participants will gain practical knowledge on how to best communicate with members and track member communication for future reference by other staff.

Audience

This course is designed for marketing staff, management, and all operations staff who have contact with members.

Objectives

By the completion of this course, participants will be able to:

- Explain the structure and configuration options of the CU*BASE Tracker system
- Identify best practices for documenting Tracker entries
- Use Sales and Service Trackers to assign internal follow-ups
- Use Sales Tracker tools to maximize the member service experience
- Explain the difference between cross-sales need groups and tasks within the Sales Tracker system

Topics Covered

- Understanding the variety of uses for and benefits of Trackers
- Configuring Tracker types and memo codes
- Configuring cross-sales need groups and tasks
- Generating mass Trackers
- Working Trackers from Account Inquiry
- Working Trackers from a follow-up
- Scheduling a follow-up
- Activity tracking and supervisory reports

Note: CU*BASE marketing programs can be utilized separately or strategically combined to meet your credit union's marketing and communication needs. Be sure to register for the following courses to take advantage of what CU*BASE can do for you:

- 4.10: Introduction to CU*BASE Marketing & Sales Tools
- 4.12: Member Connect: Building a Communication Network within CU*BASE
- 4.13: Cross Sales & Sales Trackers: Offering Members Relevant Opportunities

4.20 Report Builder 1: Working with Computer-Stored Data for Reports and Inquiries

Marketing/Sales

Course length: 1.5 hours

Summary

You can hardly go anywhere today without hearing about database management, warehousing, and mining. What do these terms mean? And how do credit union employees participate in these new concepts? CU*BASE Report Builder uses the IBM program called *Query*, a powerful, flexible tool for mining data from your CU*BASE member data.

This course will cover pre-defined inquiry options found throughout the CU*BASE system and outline the steps to create a very simple custom report.

The concepts covered in this course are used in many CU*BASE products, from teller auditing to cash management to general member inquiries. It is important that the credit union's own internal trainers understand the basic concepts in this course so that they can help credit union employees as they use CU*BASE every day.

Audience

This course is designed for line supervisors, marketing staff, and compliance personnel.

Objectives

By the completion of this course, participants will be able to:

- Explain how CU*BASE Report Builder uses the IBM Query software to access member data
- Explain how to create a customized report and inquiry
- Generate custom reports and inquiries using Report Builder and CU*BASE data

Topics Covered

- CU*BASE canned Query tools
- Understanding the Record Select process
- Understanding how a computer stores data
- Using Report Builder options to design custom reports and inquiries
- Automating credit union Queries

On-Demand Equivalents

- CMS 100: Report Builder 1 – Using Canned Queries
- CMS 101: Report Builder – Basic Custom Queries

Workshop

Course 4.20(W) is a workshop follow-up for this course that allows you to create reports using features of the Query tools learned in this course. Please be prepared with an outline of data you would like to work with during this workshop.

Note: Workshop course size is limited to 12 participants; there will be up to two people on each computer.

4.21 Report Builder 2: Building Custom Reports

Marketing/Sales

Course length: 1.5 hours

Summary

This course builds on the basics learned in Report Builder 1, and covers all features that are commonly used with the CU*BASE database structure. Helping users find exactly what they're looking for, Report Builder gives users the power to take control of one of their most valuable assets: data.

Audience

This course is designed for supervisors, marketing staff, and compliance personnel.

Objectives

By the completion of this course, participants will be able to:

- Generate custom reports and inquiries using Report Builder and CU*BASE data
- Create a custom report

Topics Covered

- Designing custom reports and inquiries
- Joining multiple files
- Selecting records
- Summary and calculation options
- Formatting and layout options
- Creating database files using Query
- The role of Report Builder in file downloads

Workshop

Course 4.21(W) is a workshop follow-up for this course that allows you to create reports using features of the Query tools learned in this course. Please be prepared with an outline of data you would like to work with during this workshop.

Note: Workshop course size is limited to 12 participants; there will be up to two people on each computer.

4.22 Report Builder 3: Database Files and String Reports

Marketing/Sales

Course length: 1.5 hours

Summary

Building on the topics covered in the previous Report Builder courses, this course takes users further in depth with a focus on the more complex aspects of Report Builder.

Audience

This course is intended for those who are well versed in Report Builder and are comfortable with building reports using multiple files.

Objectives

By the completion of this course, participants will be able to:

- Generate custom database files
- Create a string of reports
- Identify ways to join database files
- Identify ways to create custom fields
- Explain the use of custom database files with CU*BASE marketing and Member Connect tools

Topics Covered

- Using database files
- Creating custom files and using them to create report strings
- Creating complex custom fields and exploring available IBM custom-field options
- Joining multiple files with more emphasis on matching vs. un-matching data in the files

4.23 iSeries File Transfers: Moving Data from CU*BASE to Your PC

Marketing/Sales

Course length: 1 hour

Summary

How can I get my favorite Query from CU*BASE into my Excel worksheet? Why do I constantly have to key general ledger information into my ALM package? How do I get an address file ready for my insurance provider? How do I download AIRES for my auditor?

Independent PCs, LANs, and WANs are a critical part of the online CU*BASE environment. Certain processes in day-to-day credit union activity require the migration of data to individual workstations.

In this course, participants will learn the standards, minimum hardware requirements, and procedures to begin moving files from the CU*BASE platform to their personal computer.

Audience

This course is designed for credit union staff members who use personal computers to present data in a format other than that provided by CU*BASE options.

Objectives

By the completion of this course, participants will be able to:

- Identify hardware and software requirements for CU*BASE-supported file transfers
- List the various uses of file transfers
- Determine which credit union staff members need file-transfer capabilities and the security issues involved

Topics Covered

- AIRES file transfers
- Spreadsheet file transfers
- Word processing file transfers
- Third-party PC-file preparation
- Working with emulation software
- Managing file transfers as a software product, from upgrades to hardware and software
- ALM downloads

4.40 CU*Statements

Marketing/Sales

Course length: 1 hour

Summary

The number-one communication piece mailed to a member is the periodic statement. This course concentrates on the available configuration features within CU*BASE and how changes affect statement creation.

This course will help participants understand the statement insert process and the key deadlines that need to be met to ensure accurate and timely statement production.

Audience

This course is designed for marketing personnel and credit union leaders.

Objectives

By the completion of this course, participants will be able to:

- List user-configured features of CU*BASE statements
- List key deadlines for timely statement production
- Explain insert specifications and vendor mailing instructions
- List vendor insert deadlines
- Explain the statement process
- Explain the statement timeline

Topics Covered

- Statement configurations
 - Monthly statements
 - Quarterly statements
 - Annual Statements
- Statement audits
 - Notification of Audit
 - Coordination with CU*Answers
 - Coordination with Statement Vendor
- Credit union deadlines
 - Message/insert screens
 - CU*Answers deadlines
 - Vendor deadlines
 - Missed deadlines
- Email Reminders

4.90 Introduction to WordPress with SiteControl

Marketing/Sales

Course length: 1 hour

Summary

Helping you gain the most from your website investment is a major goal of this course and your instructors will facilitate that achievement. You will learn the basics of WordPress, the open-source platform that uses our SiteControl plugin. This software delivers a powerful website you can maintain with no HTML or code knowledge required.

This course covers basic WordPress-based website management along with credit union-specific features of our SiteControl plugin and basic steps you can take to keep your site updated, well organized, and visually appealing.

Audience

This course is geared toward CU*Answers Web Services WordPress with SiteControl clients.

Objectives

By the completion of this course, participants will be able to:

- Explain how WordPress with SiteControl can power their website and help them achieve their goals for their website
- Explain how to leverage the power of open-source to deliver a dynamic web experience
- List best practices and recommended steps of managing a well-designed site

Topics Covered

- WordPress basics
- WordPress as a content management system
- WordPress terms
- Themes
- Satellite rate board
- Widgets
- WordPress menu system
- Electronic forms (gravity forms)
- Best practices

4.91 Advanced WordPress with SiteControl

Marketing/Sales

Course length: 1 hour

Summary

This course builds on the Introduction to WordPress with SiteControl course and provides in-depth tips for maintaining your website. You may take the intro course first, but it's not a requirement before attending this second level. If you have been managing your website with WordPress and want to dig deeper into features and tools available in SiteControl, this course is for you!

For those who want to get the most out of their WordPress site, Advanced WordPress with SiteControl will cover a broad set of topics such as plugins, integrating with Google Maps and Google Analytics, rotating banners, and more!

Audience

This course is geared toward CU*Answers Web Services WordPress with SiteControl clients that perform most of the content-management tasks for their site.

Objectives

By the completion of this course, participants will be able to:

- Explain how third-party plugins can extend WordPress
- Explain how to use many of the popular plugins
- List advanced WordPress features
- Explain best practices of advanced site management

Topics Covered

- Intro to plugins
- Page templates
- Google Maps integration
- Building data tables (TablePress)
- Shortcodes in SiteControl
- Google Analytics
- Custom post types
 - Banners
 - Mini-features
 - Featured rates

4.94 Making a Splash with Member Statements

Marketing/Sales

Course length: 1 hour

Summary

Statement onserts are the equivalent of statement inserts without the added paper required, or the extra processing step during statement generation. This means onserts cost less. This course introduces participants to the onsert process, showing them everything from selecting onserts to reviewing onserts used for past statements.

Audience

This course is designed for employees responsible for month-end tasks, especially marketing staff involved in planning statement inserts.

Objectives

By the completion of this course, participants will be able to:

- Obtain login credentials for the onsert website
- Sign in to the onsert website
- Explain the differences between default and selective onserts
- Identify printed statement styles
- Describe the procedure for accessing and uploading onserts
- Identify the standard requirements for onserts
- Explain how to finalize and approve an onsert
- Explain the differences between selective onserts and the default onsert

Topics Covered

- Accessing the onsert website
- Printed styles for statements
- Choosing selective and default onserts
- Selecting onserts
- Using search
- Browsing history for previous onserts
- Timing and scheduling
- Email confirmations

4.95 Next Suggested Product – Targeted Sales Prompts

Marketing/Sales

Course length: 30 minutes

Summary

Next Suggested Product is a unique and valuable sales tool that brings your cross-sales initiatives to the next level. Run a one-time communication initiative or build an entire network of sales prompts. Then use the cross-sales tool to document the results of sales conversations, track incentives, and indicate the need for future action.

Provide staff with immediate resources on communication prompts to engage and inform members of opportunities or news that is most relevant to each individual member.

Use the knowledge from this class to build a framework of sales prompts that lead and support member-facing staff in their sales conversations with members.

Note: Implementation of a Next Suggested Product routine works best with a basic knowledge of Trackers.

Audience

This course is designed for credit union marketing personnel and all credit union leaders, from supervisors to CEOs.

Objectives

By the completion of this course, participants will be able to:

- Configure Next Suggested Product Trackers
- Implement the Next Suggested Product feature
- Explain how the Next Suggested Product feature can enhance member communication and sales
- Explain how to work Next Suggested Product Trackers
- Identify Cross Sales Analysis dashboard options for both general overview and personal success tracking

Topics Covered

- Configuring Next Suggested Product
- Implementing Next Suggested Product
- Analyzing Next Suggested Product statistics

5.00 Designing CU*BASE Loan Products

*Lender*VP*

Course length: 1.5 hours

Summary

This course explains how to use CU*BASE tools to configure loan products. From servicing controls to financial analysis to examination reporting, CU*BASE leads the way in flexibility and creative processing for today's loan team. This course concentrates on the broad picture of what makes up a lending portfolio and how it is focused.

Audience

This course is designed for marketing and loan-product developers.

Objectives

By the completion of this course, participants will be able to:

- List CU*BASE loan categories and their configuration options
- Explain business-unit configuration
- List loan-underwriter approval limits
- Identify configuration tools used to analyze and report on the loan portfolio
- Identify compliance, communication, and training tools available for the loan manager

Topics Covered

- Business-unit configuration
- Loan-underwriter approval limits
- Loan categories as the controlling service parameter
- Multiple-account suffixes
- Interest-calculation methods
- Delinquency-calculation methods
- Disbursement alternatives
- Insurance alternatives
- Mortgage/construction-loan information
- Understanding the difference between MEMBER5 and MEMBER6
- General ledger interfaces
- IRS reporting
- Payment-change options
- Purpose codes
- Security codes
- Collateral codes
- Insurance tracking
- Other miscellaneous configuration options
- Configuring loan products for Rate Inquiry and the online banking rate board

5.10 Lending from Request to Disbursement: Understanding the Application Process

*Lender*VP*

Course length: 1 hour

Summary

This course focuses on selling loans to members. From the initial “Hello, how are you?” to the “Where would you like your loan funds?,” this course shows participants how CU*BASE can make every credit union staff member an effective loan sales representative.

The key to making a member a lifetime borrower is an interactive lending database that tracks the member’s application information the entire time that member is active. This database creates a state of readiness that can be accessed for use not only by credit union staff but for the online banking products of the future.

How do you sell a loan? Are your members online or do they still fill out applications, wait in line, and wonder why you don’t remember them since the last time they needed a loan?

Audience

This course is designed for all credit union personnel involved in selling loans to members.

Objectives

By the completion of this course, participants will be able to:

- List the components of a loan interview from start to finish
- Explain how to measure a loan department’s output
- List the various uses of underwriting databases
- Identify the key components of approving or denying a member loan request

Topics Covered

- Loan Quoter
- Loan requests and working with the electronic loan file
 - Credit reports
 - Outstanding loans
 - Open-end loan contract
 - Risk-based lending
- Loan-application processing and household enrollment
- Electronic loan checklist
- Printing loan forms
- Creating loans and disbursing funds
- Loan-file verification
- Underwriting databases
 - Member-written applications
 - Credit bureau credit reports
 - Online household database
 - Online archived applications

On-Demand Equivalents

- CLS 100: Lending Basics
- CLS 101: Lending 2 - Creating and Disbursing Loans for Members and Non-Members

5.11 CU*BASE Mortgage Processing

*Lender*VP*

Course length: 1.5 hours

Summary

In this course we will review CU*BASE options for servicing mortgage loans through the credit union's traditional service delivery points. 360-day loans require repayment rules and special handling that are not related to the typical credit union member loan. Understanding and explaining these differences to your members will be the difference between using the CU*BASE system and purchasing an outside servicing package. This course is key to getting the maximum return on CU*BASE mortgage loans.

Audience

This course is designed for loan-product designers, lending managers and supervisors, and member-service supervisors.

Objectives

By the completion of this course, participants will be able to:

- Explain the loan-servicing rules for 360 day-configured loans
- Identify extended mortgage servicing and CU*BASE automated features
- Explain the difference between amortization, simple interest, and scheduled interest
- Explain payment-application and system-accrual processes

Topics Covered

- Servicing 360-day-interest loans
- Configuring mortgage-lending products
- Preparing loans for final payoff
- Mortgage-payment matrix

5.12 CU*BASE Escrow Processing

*Lender*VP*

Course length: 1.5 hours

Summary

In this course, participants will review CU*BASE options for maintaining mortgage-escrow shares and escrow analysis. From the initial configuration of type codes and escrow payees through the payment procedures and annual escrow statement, participants will learn the interactive features that make CU*BASE a robust escrow-processing system.

Whether you are a current user of the escrow-processing system or haven't had much experience with it, this course will be beneficial. Pick up some new tips or use the information to decide in favor of automating escrow processing this year.

Audience

This course is designed for loan-product designers, lending managers and supervisors, mortgage-servicing staff, and member-service supervisors.

Objectives

By the completion of this course, participants will be able to:

- Identify key components involved in escrow administration and government regulation
- Set up an escrow account
- Disburse escrow funds
- Perform escrow analysis
- Use CU*BASE for escrow administration

Topics Covered

- Escrow share configuration
- Escrow payees/type codes
- Open escrow account/add payees
- Disbursement report
- Disbursing escrow payments
 - Tax, insurance, and PMI tracking
- Escrow analysis
 - Analysis configuration
 - Preview(trial)/create(final) analysis
 - RESPA (Real Estate Settlement Procedures Act)

5.15 Investor Relations

*Lender*VP*

Course length: 1 hour

Summary

Investor opportunities take a variety of forms. In this course we will discuss some of those options as well as the tools available to service an investor loan in the secondary market.

This course covers reporting, remitting, and balancing using investor-driven forms and required regulations to service mortgages that are owned by an investor.

Audience

Credit union managers and leaders involved with setting the direction for loan-department strategies and preparing for new opportunities.

Objectives

By the completion of this course, participants will be able to:

- Explain the history of the secondary market
- Identify key components of payment processing and investor reporting
- Identify various investor accounting cycles
- Explain how to use CU*BASE for investor processes

Topics Covered

- History of mortgage lending and the secondary market
- Using the CU*BASE participation lending software to support the investor process
- Setup and processing
- Payment processing, investor reporting, and remitting
- Download process for investor reporting
 - Freddie Mac – Upload to MIDANET
 - Fannie Mae – Upload to Surf
- Resources
 - www.fanniemae.com
 - www.freddiemac.com
 - www.fhlb.com
 - www.usda.com
 - www.hud.gov

5.20 Organizing a Loan Department and Servicing Loans on CU*BASE

*Lender*VP*

Course length: 1.5 hours

Summary

This course focuses on analyzing every aspect of the lending department, looking at all processes from an operational efficiency standpoint.

Audience

This course is designed for all lending personnel and will also be helpful to senior management and lending leaders interested in a broad perspective of their loan department.

Objectives

By the completion of this course, participants will be able to:

- Identify key components of the lending process, from sales and marketing to final approval and servicing
- Explain how CU*BASE can improve the work flow of member lending
- Identify key positions within a credit union lending team
- Define the various roles that different credit union teams have in the servicing of loans
- Design loan products based on member needs and motivations
- List credit union responsibilities after a loan has been approved
- Explain how loan personnel can communicate with other departments for positive member results

Topics Covered

- Understanding the impact of the Household database
 - Defining a credit union policy
- Centralized lending tools
- Configuration options
 - Interest-rate calculations
 - Payment methods
 - Payment matrix
 - Variable-rate loans
 - Risk-based and relationship lending
- Pledged shares and miscellaneous secured shares
- Denial features and the denied database
- Disbursement methods and matching loan products to member lifestyles
- Statistical analysis
 - Loan-activity analysis
 - Applications vs. denials vs. approvals
- Analyzing loan-account inquiries
- Identifying potential servicing problems (next pay dates, payment frequencies, AFT, ACH/payroll)
- Understanding CU*BASE payment history

5.30 Open-End and Line-of-Credit Lending

*Lender*VP*

Course length: 1 hour

Summary

In a world that expects immediate response and immediate satisfaction, the time between a loan request and the money being put in the member's hands is shrinking daily. One key to member satisfaction with a credit union loan program is the automated distribution of pre-approved, open-end, and line-of-credit loans.

With automation, challenges will come. How do you avoid disbursing on delinquent loans? How do you recalculate payments? How do you analyze credit expiration dates? This course will answer these and many other questions on how CU*BASE can lead the way to member satisfaction.

Audience

This course is designed for loan supervisors and loan-product developers.

Objectives

By the completion of this course, participants will be able to:

- Explain the difference between open-end, closed-end, and line-of-credit loans
- List the different types of line-of-credit and open-end loans
- Explain how data-processing automation can replace lending personnel and the need for manual decisions

Topics Covered

- Loan category options
 - Review dates
 - Payment changes
 - Disbursement vs. all transactions
 - Payment-change timing
 - Disbursements from zero balance
 - Estimated calculations
 - Amortized calculations
 - Table calculations
- Disbursement Points
 - Teller line
 - Overdraft protection
 - Checks
 - ATMs
 - Audio response
 - Shared Branch Outlets
- Open-end loan contracts
- Analyzing promissory notes and disclosure paperwork

5.40 Managing Bankruptcy

*Lender*VP*

Course length: 1.5 hours

Summary

You just received a notice from the court that one of your members has filed bankruptcy. What are the procedures you must follow to make sure you manage this situation properly?

This course focuses on the communication of the bankruptcy to staff, the compliance of the laws relating to what you can and can't do, and making sure the account is tracked and treated appropriately.

Audience

Credit union staff responsible for the collection of problem loan and savings accounts.

Objectives

By the completion of this course, participants will be able to:

- Explain how to digitally communicate a bankruptcy to all staff
- Maintain bankrupt accounts in such a way as to preserve information needed by the court
- Code a credit bureau file
- Track bankrupt accounts through Tracker processing
- Create a write-off account

Topics Covered

- Updating member-account information related to bankruptcy
- Statement-mail-group configuration
- Credit-reporting codes
- Placing comments and freezes on member accounts
- Designing Tracker types to monitor bankrupt accounts
- Clearing Tiered Services
- Removing ancillary services
- Show Me the Steps bankruptcy topics

5.50 Interactive Online Collections

*Lender*VP*

Course length: 1.5 hours

Summary

This course concentrates on the CU*BASE interactive online collections system. This tool aids credit union collectors in all facets of delinquent-member interactions and communications. Through completing the work, the collector actually builds a historical database of member issues, problems, and promises to be communicated to all credit union staff in their collective efforts to work with the delinquent member. This historical record keeping is paramount to effective disaster-recovery and collections processes.

Audience

This course is designed for loan collectors, loan-product developers, and loan officers.

Objectives

By the completion of this course, participants will be able to:

- Identify CU*BASE tools used for gathering, maintaining, and reporting collections information
- List collections processes
- List collections follow-up tools

Topics Covered

- Configuring collections-system levels
 - Automated delinquency freezes and releases
- Working with delinquency notices
- CU*BASE collections system
 - Delinquent loans
 - Negative-balance shares
 - Overline line-of-credit loans
 - Follow-up practices
- Working with delinquency comments in Tracker
- Show Me the Steps bankruptcy topics

On-Demand Equivalent

- CCS 100: Collections Basics
- CCS 101: Advanced Daily Work

5.70 Centralized Underwriting: Inquiry for Loans in Process

*Lender*VP*

Course length: 1 hour

Summary

How does your credit union communicate the daily processes of the loan department to other staff? How frequently does a member want to know the status of a loan request, only to be put on hold until the loan officer is available? Is your credit union considering expanding its lending functions to locations in which you simply want a loan interviewer rather than a loan underwriter?

By investigating CU*BASE underwriting codes and related features, many of these issues can be addressed during this course, which is a must for loan supervisory personnel and upper management.

Audience

This course is designed for all loan personnel but is especially geared toward lending managers responsible for developing the lending process and communicating the process to staff.

Objectives

By the completion of this course, participants will be able to:

- Identify methods to increase lending productivity, accuracy, and efficiency
- Explain how centralized underwriting can improve staff and member communication
- List the steps involved in selling, approving, and processing a member loan request

Topics Covered

- Underwriting codes
- Application-status inquiry
- Approvals and denials
- Modifying loan requests
- Auditing underwriter approvals
- Approval security
- Report review

5.71 Laser-Forms Management

*Lender*VP*

Course length: 1.5 hours

Summary

Forms are an integral part of your credit union. From initial design through the final submission at completion, forms are intended to gather information concisely for each purpose. Some forms are subject to regulations and designed according to specification. Laser-print quality is standard on forms received from today's credit union.

From choosing your laser-forms vendor to coordinating CU*Answers' programming staff to teaching staff how the new form is going to work, this is a real partnership with your CU*Answers forms coordinator. This course will focus on that process.

Audience

This course is designed for credit union staff who manage the selection, maintenance, and implementation of credit union forms.

Objectives

By the completion of this course, participants will be able to:

- Explain the forms-development process, from selection to implementation
- Explain pricing for forms development
- Explain the process loan officers use in preparing documentation for members
- Identify forms hardware options

Topics Covered

- Forms vendors
- Laser loan forms configuration
- Laser checks and money orders
- Other CU*BASE laser forms
- Mortgage forms generation:
 - Settlement statement
 - Mortgage document
 - Satisfaction
 - Good faith estimate
- Printing loan forms as part of the daily CU*BASE lending process

5.75 Implementing the 247 Lender Decision Model

*Lender*VP*

Course length: 1 hour

Summary

Saying “Yes” is a 24/7 requirement with today’s credit union member. If your credit union is going to stay relevant in your members’ lives, you have to be willing to work when the member is ready. You must model loans and extend yourself to every automated channel you can.

That’s where 247 Lender comes in. 247 Lender is a CUSO-owned decision model that lets you give automated approval 24 hours a day, 7 days a week, through all your delivery channels.

Come learn how you can implement 247 Lender and take full advantage of it throughout your entire organization.

Audience

This course is designed for credit union lending leaders and loan personnel.

Objectives

By the completion of this course, participants will be able to:

- Identify the features and benefits of the 247 Lender decision model
- List 247 Lender configuration options
- List the steps required to implement 247 Lender
- Explain how 247 Lender affects day-to-day lending activity

Topics Covered

- Getting started with 247 Lender
 - Changes to your loan policies
 - Developing a plan
- Configuring 247 Lender minimum-requirement filters
- Configuring your approval matrix
- Configuring loan-delivery channels
- Configuring risk-based pricing
- Activating 247 Lender
- Pulling decisions and viewing decision details
- Monitoring 247 Lender decisions

Workshop

Course 5.75(W) is a workshop follow-up for this course that allows you to work with CU*Answers staff to configure your credit union’s 247 Lender service.

5.76 Managing Delivery Channels

*Lender*VP*

Course length: 1 hour

Summary

Are you driving your lending team to new heights? Are there channels of lending opportunities you are not tapping into yet or that are not being mined to their full potential? Come learn how!

Audience

This course is designed for credit union lending leaders.

Objectives

By the completion of this course, participants will:

- Identify the various loan-delivery channels
- List ways to generate new loan opportunities
- List the advantages of adding new loan-delivery channels
- List the features of Retailer Direct, Lender on the Road, and DealerTrack

Topics Covered

- Retailer Direct: Retailer Direct is an opportunity for you and a trusted business partner to electronically deliver loan applications quickly and securely from any retail location that you choose directly to your CU*BASE lending factory.
- Lender on the Road: Bring your loan department to your member. Lender on the Road lets you process loan applications via a secured Internet connection while away from your desk. It works anywhere there is an Internet connection. Finance a new boat purchase at the boat show, home improvement at the home expo, plastic surgery at the doctor's office - anything you choose.
- DealerTrack: DealerTrack is a provider of on-demand software and data solutions for the automotive-retail industry in the United States. DealerTrack uses the Internet to link automotive dealers with credit unions to service the indirect environment.

Workshop

Course 5.76(W) is a workshop follow-up for this course that allows you to work with CU*Answers staff to configure your credit union's Retailer Direct, Dealer Track, and Lender on the Road services.

5.79 Real Estate Solutions

*Lender*VP*

Course length: 1.5 hours

Summary

This course introduces the suite of tools and solutions offered by CU*Answers to help you and your credit union succeed in today's real estate-lending market.

Audience

This course is geared toward loan officers, lending managers, and other credit union personnel involved with real estate lending and/or processing.

Objectives

By the completion of this course, participants will be able to:

- Explain web-based mortgage application and processing solutions offered by CU*Answers
- Identify mortgage-servicing tools available in CU*BASE

Topics Covered

- Web-based mortgage application and processing
- Escrow processing
 - Setup
 - Payables
 - Analysis
- Mortgage servicing: secondary market and portfolio loans

5.80 Participation Lending Strategies

*Lender*VP*

Course length: 1 hour

Summary

Participation opportunities take a variety of forms. In this course we will discuss some of those options as well as the tools available to service a participation loan.

Audience

This course is geared toward credit union managers and leaders involved in setting the direction for their loan-department strategies and preparing for new opportunities.

Objectives

By the completion of this course, participants will be able to:

- Identify participation-loan opportunities
- List tools available to service participation loans

Topics Covered

- CU*BASE participation lending software in action
- Participation loan setup and processing
- Flexibility of participation software to be used in a variety of application environments

5.81 Introduction to the Loan Fulfillment Center by Accenture

*Lender*VP*

Course length: 1.5 hours

Summary

This course will provide an overview of the Loan Fulfillment Center, available through the Mortgage Cadence Cloud. Participants will learn how the Loan Fulfillment Center platform can benefit members and credit unions. As a provider of the platform, CU*Answers is able to offer clients a well-rounded solution for accepting mortgage applications online, managing the application pipeline, and taking the file through processing and closing.

Audience

This course is geared toward lending managers and supervisors and mortgage staff.

Objectives

By the completion of this course, participants will be able to:

- Identify key components of the Loan Fulfillment Center
- Explain the member experience of obtaining information and applying online
- Explain the electronic delivery process of initial mortgage disclosures
- Manage the loan pipeline and maximize mortgage opportunity with CU*BASE tools and reports
- Process a mortgage loan through the Loan Fulfillment Center
- Generate a complete closing package through the Loan Fulfillment Center
- List options that can be used to order items electronically
- Create an electronic mortgage file

Topics Covered

- Mortgage origination
- Mortgage application process
- Pipeline management
- Electronic-mortgage file
- Mortgage-document compliance

5.85 Participation Loan Servicing: Understanding the Settlement Process

Lender*VP

Course length: 1 hour

Summary

The CU*BASE participation lending software was created to assist credit unions in monitoring the status of commercial loans partially sold to other financial institutions. The system tracks investing financial institutions and the loans that they have purchased. It automatically settles principal and interest as well as keeps track of accrued income owed to the investor between payment cycles. There is no other core data-processing system that handles these types of transactions with such thoroughness.

This course will focus on the process of settling participation loans with the investing credit unions and creating appropriate reports.

Audience

This course is geared toward credit union CFOs and accounting team members.

Objectives

By the completion of this course, participants will be able to:

- Identify key lending tools available via the *Participation Loan Processing Tools* category (PART)
- List daily and monthly processes associated with servicing a sold loan
- Explain the investor settlement process
- List participation-lending methods used by other CU*BASE clients

Topics Covered

- Configuring investors and investor types
- Setting up a participation loan and using configuration options
- Reviewing a sample settlement work file
- Daily processing
- Monthly processing
- Related general ledger entries
- Reports available via the updated *Participation Loan Processing Tools* category (PART)

5.86 Secondary-Market Loan Servicing: Understanding the Settlement Process

Lender*VP

Course length: 1 hour

Summary

Since its introduction, CU*BASE participation lending has evolved to include processing for secondary-market real estate loans, where 100% of the loan is sold into the market, but the servicing is retained by the credit union. This feature continues to grow in popularity and is constantly being improved to meet credit union lending needs.

The CU*BASE participation lending software tracks secondary mortgage market investors and the loans they have purchased. It automatically settles principal and interest as well as keeps track of accrued income owed to the investor between payment cycles.

This course will focus on the daily and monthly processes involved with servicing secondary-market mortgages on CU*BASE. It will also focus on the many reports available within the system and the initial configuration options.

Audience

This course is geared toward mortgage servicing staff, credit union CFOs, and accounting staff.

Objectives

By the completion of this course, participants will be able to:

- Identify key lending tools available via the *Participation Loan Processing Tools* category (PART)
- List daily and monthly processes associated with servicing a sold loan
- Explain the investor settlement process

Topics Covered

- Configuring investors and investor types
- Setting up a participation loan and using configuration options
- Reviewing a sample settlement work file
- Daily processing
- Monthly processing
- Related general ledger entries
- Reports available via the *Participation Loan Processing Tools* category (PART)

6.00 Organizing and Managing Your Operations Center

Self-Processing

Course length: 3 hours

Summary

“Since my credit union went in-house, we don’t know when anything happens, and it always seems that we are behind the gun when it comes to finding personnel to run end-of-day, end-of-month, or special-system needs.”

Sound familiar? This course concentrates on organizing a data-center operation, from who does what to when, why, and how. With the sophistication of today’s credit union, the responsibility for running an in-house system is becoming more and more overwhelming. CU*BASE can make those problems seem more manageable through planning and education.

Audience

This course is designed for IT administrators, system operators, and credit union leaders responsible for making that self-processing decision.

Objectives

By the completion of this course, participants will be able to:

- Explain the planning, documentation, and follow-through necessary to run a day-to-day credit union data-processing operation
- List time-management strategies for data processing and their effect on the front office and member needs
- Explain the true cost of trained data-processing personnel and the need for such personnel
- Explain how data-processing personnel can be cross-trained to assist in managing an operations center

Topics Covered

- End-of-day cycles
- End-of-month cycles
- Dividend posting
- Service-charge posting
- Third-party transmissions and posting routines
 - Checking/share drafts
 - ATM and debit services
 - ACH
 - Payroll
 - Insurance postings
 - Miscellaneous
- Verification methods and follow through
- Operational preventative maintenance
- The need for off-hour processing
- Working with audio response and other after-hour products
- Backup personnel
- Using the right tools
- Writing a budget
- Disaster recovery

6.10 iSeries System Security

Self-Processing

Course length: 2 hours

Summary

This course covers the IBM tools that literally open the door to your employees' access to the credit union's iSeries. To avoid the dreaded "whoops," IBM has provided an excellent security system for the iSeries. Interfacing that with your day-to-day operations is the key to a smooth and effective credit union day.

As the iSeries is one of the credit union's most expensive fixed assets, the responsibility for securing its utilization and access cannot be emphasized enough.

Audience

This course is designed for IT administrators, systems operators, and credit union leaders responsible for making that self-processing decision.

Objectives

By the completion of this course, participants will be able to:

- List iSeries security tools required for credit union operation
- Identify the iSeries security tools that enable the credit union to work with third-party vendors and outside users
- Identify auditing and compliance tools used to track iSeries usage
- Explain security best practices as they relate to iSeries tools

Topics Covered

- iSeries security basics
- Assigning a security officer
- Passwords
- External access
- Credit union employee profile
- Maintaining a profile list
- Examination and follow-up
- Auditing iSeries utilization
- Understanding system security from outside the data processing environment

6.20 iSeries Management and System Tools

Self-Processing

Course length: 3 hours

Summary

Although data processing marketing staff would like to convince you otherwise, there is a little bit more to the iSeries than plugging it in and turning it on. If you feel you are constantly facing purchasing decisions as to more disk, more memory, and new equipment, it's important that you understand how to get the most for your dollar. CU*Answers understands that self-processing credit unions need both solid software and hardware management to be the solution the credit union signed up for.

Audience

This course is designed for IT administrators, systems operators, and credit union leaders responsible for making that self-processing decision.

Objectives

By the completion of this course, participants will be able to:

- List the activities necessary to maintain and maximize the iSeries DASD
- List iSeries performance measurement and analysis tools and resources
- Explain how key CU*BASE features affect system operation and the potential of the iSeries
- Identify key iSeries commands and programs

Topics Covered

- Key iSeries commands
- CU*BASE file management
- iSeries system configurations
- iSeries communications
- iSeries workstations
- Merging and purging
- Backups and data retention
- IPL
- Understanding your IBM relationship
- Working with CU*Answers support services
- Employee access vs. third-party access

6.30 Managing Your Hardware Resources and Relationships

Self-Processing

Course length: 1.5 hours

Summary

When your credit union became a self-processor and decided that an iSeries would become a key part of your fixed-asset schedule, you assumed the responsibilities of keeping up with hardware providers and the technology they offer. This is a world of salesmen, consultants, and fortune tellers. Who do you listen to and what services are available? CU*Answers and CU*BASE don't have all the answers, but can help by combining the purchasing needs of CU*Answers' online-service company with that of your credit union. This course discusses how to maximize technology-investment decisions.

Audience

This course is designed for IT administrators, system operators, and credit union leaders responsible for making that self-processing decision.

Objectives

By the completion of this course, participants will be able to:

- Identify IBM iSeries marketing systems and available vendors
- Access iSeries software support, both IBM and third-party support
- Work with CU*Answers to purchase and administer iSeries hardware
- Explain CU*BASE third-party relationships and strategies as they relate to the iSeries

Topics Covered

- Hardware support
- Software support
- iSeries: What's hot
- Peripheral devices
- Third-party relationships
 - Audio response
 - Cold-storage devices
 - Statements
- Purchasing strategies

6.40 Year-End Planning for Self-Processing Credit Unions

Self-Processing

Course length: 1.5 hours

Summary

This course is designed to review the many tasks and procedures related with end-of-year and annual tax reporting. We will review the entire Year-End Processing Guide for the current year.

Audience

This course is designed for all staff responsible for completing year-end tasks, including special tasks for operators and data-processing coordinators in a self-processing environment.

Objectives

By the completion of this course, participants will be able to:

- List critical year-end deadlines
- List year-end procedures
- List year-end verification tasks

Topics Covered

- Task list
- Tax forms and pricing
- Using member statements as substitute 1099-INTs
- Bonus dividends and loan-interest rebates
- Verification
 - Loan categories (1098 reporting)
 - Shares and CDs (1099-INT reporting)
 - A/P vendors (1099-MISC reporting)
 - IRA/HSA
 - Balance file
 - The tax file and printing the 1099/1098 tax report
- IRAs
 - Form 1099-R instructions (CMG Administered)
 - Form 5498 instructions (CMG Administered)
 - Form 5498 instructions (Self-administered)
- Procedures for beginning-of-year and statement processing

7.00 CU*BASE GOLD: Customizable Features/Tools

Network Services

Course length: 1 hour

Summary

CU*BASE GOLD offers flexibility and power to customize your workstation to fit the way *you* work. This course will show you the features available in CU*BASE GOLD to personalize your CU*BASE workstation. You'll even have some fun selecting a customizable screen!

Audience

This course is designed for all CU*BASE users of all credit union disciplines.

Objectives

By the completion of this course, participants will be able to:

- Customize their CU*BASE favorites list
- Identify key employee-security features
- Control the tools that appear on their home page

Topics Covered

- Using the CU*BASE GOLD Preferences feature
 - Selecting favorite tools as the default home page view
 - Choosing a color theme
 - Activating auto-security upon login
- Controlling employee access to tools
- Using the *Network Links* button
- Understanding AnswerBook
- Accessing CU*BASE online help

7.15 CU*BASE Hardware & Communications

Network Services

Course length: 1 hour

Summary

This course focuses on the planning and issues involved in the purchase, installation, and support of hardware and communications connected to the CU*Answers iSeries system.

Audience

This course is designed for credit union personnel who have the direct responsibility for maintaining PCs, printers, routers, and data communications.

Objectives

By the completion of this course, participants will be able to:

- List considerations for purchasing and maintaining PCs and network devices
- Explain the technical aspects of managing spool files, writers, and OUTQ functions
- Identify communication requirements, including MPLS and EncryptionPak backups

Topics Covered

- Compatibility requirements for PCs and Ethernet LAN devices
- Managing hardware problems using spool files, OUTQs and writers
- MPLS and disaster-recovery design
- Benefits of EncryptionPak
- Credit union responsibilities
- CU*BASE support vs. third-party vendor support

7.20 CU*BASE GOLD Updates and Support

Network Services

Course length: 1 hour

Summary

When you receive an announcement of an upcoming CU*BASE GOLD Update, do you look forward with anticipation to new tools and improvements, or groan, thinking of a Monday morning full of malfunctioning PCs?

Receiving your credit union's GOLD updates should *not* be a headache. In this course, participants will learn how the update process works. Participants will also learn about support options and tricks for making sure their network can handle a CU*BASE update with minimal effort on their part.

Audience

This course is a must for credit union personnel who have direct responsibility for maintaining PCs that use the CU*BASE GOLD software.

Objectives

By the completion of this course, participants will be able to:

- Explain the GOLD update process
- Identify support tools for managing GOLD updates

Topics Covered

- Managing CU*BASE GOLD updates
 - When they happen
 - Steps To take when updates are missed
 - Unpacking files
 - Running manually
- GOLD file structure
- The GOLD JWC file
- CU*BASE GOLD workstation-monitoring tools
- Using the web page for support
- GOLD Update Appliance (GUAPPLE) and how it can simplify the GOLD update process

7.25 Configuring CU*BASE Software

Network Services

Course length: 1 hour

Summary

This course focuses on the hardware and software configuration for the proper use of the CU*BASE suite of utilities.

Audience

This course is designed for credit union personnel who have direct responsibility for maintaining the credit union's internal LAN or WAN.

Objectives

By the completion of this course, participants will be able to:

- Explain how devices interact with CU*BASE
- List hardware and network considerations
- List factors involved in CU*BASE software configuration
- Identify CU*BASE print sessions and OUTQs

Topics Covered

- Device configuration
 - Loan, check, and thermal printers
 - Workstation
- Virtual devices
- iSeries access for printer sessions
- Adobe Acrobat Reader configuration for online help
- Seagull and the JWalk Client

8.00 Managing Compliance Using CU*BASE

Course length: 1 hour



Enterprise Risk Management

Summary

In this course, participants will take a look at key CU*BASE tools designed to help their credit union remain in compliance with current regulations. The course will cover Regulation D, Regulation E, and dormancy issues, along with other related issues brought forward by course participants. Course participants will also get a look at CU*BASE tools that will help them prepare for audits and examinations.

Audience

This course is designed for key credit union leaders, back office and compliance personnel, security officers, and member-service representatives.

Objectives

By the completion of this course, participants will be able to:

- List key CU*BASE compliance tools and ways they can be used to help credit unions adhere to regulations
- Identify CU*BASE red-flag tools
- List activity-monitoring procedures
- Identify areas typically vulnerable to suspicious activity
- Identify key CU*BASE auditing tools
- Maintain a compliance-responsive environment using CU*BASE

Topics Covered

- Regulation D transactions
- Regulation D fee configuration
- Report of Transaction Accounts, Other Deposits, and Vault Cash (FR 2900)
- Definition of a dormant member
- Dormancy fee configuration
- Regulation E transactions and CU*BASE statements
- Internal procedures for handling potential red-flag activity
- CU*BASE red-flag tools
 - Detecting unauthorized account access
 - Detecting fraudulent activity
 - Identifying inconsistent information
- CU*BASE file-maintenance logs
- CPA audit preparation
- Regulatory examination preparation
- Compliance software development
- CU*Answers compliance resources

8.02 Using CU*BASE Tools for Bank Secrecy Act (BSA) Compliance

Enterprise Risk Management

Course length: 1 hour

Summary

Complying with rules and guidelines imposed by the Bank Secrecy Act (BSA) can be a complicated task. CU*BASE tools for monitoring transaction activity are built to last through the complexity of rule interpretations and performance of due diligence on credit union accounts. This course is designed to teach your supervisory personnel the configurations and procedural operation of CU*BASE tools used in monitoring, evaluating, and reporting on the events associated with BSA compliance.

Audience

This course is designed for key credit union leaders and managers who work with BSA-related transactions and accounts.

Objectives

By the completion of this course, participants will be able to:

- Identify CU*BASE BSA tools
- List BSA-monitoring configuration options
- List daily procedures for report monitoring and CTR-related activities
- Use CU*BASE Audit Trackers
- List and explain standard BSA regulations
- List daily monitoring reports available in CU*BASE

Topics Covered

- BSA configurations for transaction types
- Daily BSA monitoring
- Transactions
- Reports
- Audit Trackers
- Verifying BSA activity
- Online CTR forms
- Due-diligence analysis and tasks
- Follow-up activities
- Best practices for achieving BSA compliance

8.03 Key Factors to Evaluate in Your Agreements

Enterprise Risk Management

Course length: 1 hour

Summary

This course will discuss some of the nuances with respect to evaluating agreements with third parties and the credit union's own membership agreements.

Audience

This course is designed for CEOs and other credit union managers and decision makers.

Objectives

By the completion of this course, participants will be able to:

- Develop a checklist for conducting vendor risk assessments
- List key concerns of membership agreements

Topics Covered

- Considerations for vendor evaluations
- Member-agreement concerns

8.04 Using CU*BASE to Calculate Risk

Enterprise Risk Management

Course length: 1 hour

Summary

CU*BASE has many powerful tools to help a credit union of any size manage risk. This course is a practical introductory course outlining how to obtain risk-management data and what the examiners may be looking for during your next Safety and Soundness exam. Anyone who is involved in managing risk in their credit union will benefit from this course.

Audience

This course is designed for CEOs, internal auditors, and compliance leaders.

Objectives

By the completion of this course, participants will be able to:

- Identify key CU*BASE risk-management tools
- Work with data used by CU*BASE risk-management tools
- Interpret findings of CU*BASE risk-management tools

Topics Covered

- Important risk-management tools
- Overview of key financial ratios

8.05 Fundamentals of Enterprise Risk Management

Enterprise Risk Management

Course length: 1 hour

Summary

This course will help participants understand the basics of enterprise risk management and how CU*BASE can help with reports and calculations.

Audience

This course is designed for CU*Answers clients and partners.

Objectives

By the completion of this course, participants will be able to:

- Explain the fundamentals of developing an enterprise risk-management program
- Explain the various types of risk

Topics Covered

- Market risk
- Transaction risk
- Credit risk
- Liquidity risk
- Concentration risk
- Interest rate risk
- Reputation risk
- Strategic risk

8.06 Understanding Credit Union Liability for Security Breaches

Enterprise Risk Management

Course length: 1 hour

Summary

This course will help participants understand when a credit union will be liable for losses resulting from a security breach and when a credit union must notify its members of a breach.

Audience

This course is designed for CU*Answers clients and partners.

Objectives

By the completion of this course, participants will be able to:

- List rules that govern credit union liability for security breaches
- Explain how to prevent losses resulting from security breaches

Topics Covered

- Negligence
- UCC 4A
- Consumer notification laws

8.07 Monitoring Abnormal Activity

Enterprise Risk Management

Course length: 1 hour

Summary

This course is designed to help you understand the tools in CU*BASE for monitoring abnormal and suspicious member activity. CU*BASE has numerous tools to track abnormal member activity, high risk-designated members, and activity frequently related to fraud.

Audience

This course is designed for compliance and internal audit professionals responsible for managing risk associated with day-to-day member transactional activities.

Objectives

By the completion of this course, participants will be able to:

- Explain best practices for managing risk
- Identify CU*BASE tools used to uncover fraudulent activity
- Provide examples on how the AuditLink team and other credit unions use CU*BASE tools to monitor abnormal activity
- List the daily, weekly, and monthly tasks necessary to mitigate the risk of losses due to fraudulent activity

Topics Covered

- Understanding how to translate the credit union's CIP into the account opening and ongoing monitoring process
- Configuring and using the due diligence fields on the system
- Using the high-risk report functions for both high-risk members and employee activity
- Reviewing the sampling tools that help uncover potential transactional risk
- Configuring and using the Abnormal Activity Monitoring feature
- Exploring other tools associated with compliance-related requirements

8.08 Internal Controls Best Practices

Enterprise Risk Management

Course length: 1 hour

Summary

This course will offer participants an open forum in which to discuss issues and questions related to internal controls. The course will also cover CU*BASE tools that can aid credit unions in building sound internal control structures. Additionally, the course will cover current events surrounding insider abuses and employee fraud.

Audience

This course is designed for internal audit professionals, CEOs, and CFOs.

Objectives

By the completion of this course, participants will be able to:

- List CU*BASE features and reports that help uncover fraud
- Explain system security best practices
- Explain how fraud-related loss can be prevented using a solid set of controls

Topics Covered

- Tool security best practices
- File maintenance and the important changes that need to be made
- Activity that needs monitoring such as suppressed transactions, loans on dormant accounts, ACH activity on general ledger accounts
- Suspense and settlement accounting
- Internal practices that lead to a stronger control structure

8.09 Vendor Management 101

Enterprise Risk Management

Course length: 1 hour

Summary

This course will cover the nuances of a solid vendor-management program. The course will outline the basic components of a program and regulatory requirements that govern this area of credit union operations.

Audience

This course is designed for compliance professionals, CEOs, and CFOs.

Objectives

By the completion of this course, participants will be able to:

- Identify FFIEC guidelines related to vendor management
- Determine which vendors have the most critical need for review
- Determine who should review vendors
- Determine how often vendors should be reviewed
- Develop a checklist of items that need to be monitored
- Classify vendors according to type

Topics Covered

- The differences between centralized and decentralized programs
- Vendor management tools
- Identifying vendors with the most critical need for review
- Ongoing requirements for vendor reviews
- Reporting and communicating critical events

9.55 Social Engineering: The Human Side of Security

Secure-U

Course length: 1 hour

Summary

In this course, participants will explore social engineering and steps you can take to reduce the threat. This course will lead participants through real-world examples of social engineering attacks via email, phone, SMS, shoulder surfing, and other ways. Participants will also look at actual examples of attacks and how to recognize and respond to them.

Audience

This course is relevant to all employees.

Objectives

By the completion of this course, participants will be able to:

- Explain social engineering and how it is used to compromise security
- List tricks and tools used to gain trust
- Explain the ramifications of falling victim to an attack
- Explain how to identify an attack
- Explain best practices for responding to an attack

Topics Covered

- Social-engineering definitions, examples, and statistics
- Security awareness
- Understanding threats
- Identifying a threat
- Gauging vulnerabilities to attacks
- Reducing exposure to attacks
- Defending against attacks
- Tactics used by social engineers from dumpster diving to impersonation
- Prevention and detection of social-media scams

On-Demand Equivalent

- CSU 300: The Human Side of Security

9.65 Business Continuity Planning

Secure-U

Course length: 30 min

Summary

This course provides an overview of business continuity planning and the five-phased approach of developing and implementing a business continuity management program based on industry guidelines and best practices.

In a constantly changing and increasingly complex business and IT environment, unplanned disruptions can be costly, resulting in financial losses, member dissatisfaction, and regulatory compliance issues. Countering these risks and creating the resilience a business must have to remain competitive requires more than a stand-alone recovery plan.

Audience

This course is geared toward credit union professionals responsible for the development and maintenance of their organization's disaster recovery plans.

Objectives

By the completion of this course, participants will be able to:

- Compare and contrast disaster recovery and business continuity planning
- Identify the five phases of designing a business continuity management program
- Outline and prioritize steps required to implement and maintain a business continuity management program
- List CU*Answers resources and services available to assist in business continuity management program design and implementation

Topics Covered

- The case for business continuity
- The five phases of the business continuity management program life cycle
- Program initiation and management
- Risk evaluation and controls/business impact analysis
- Business continuity and recovery strategies
- Plan documentation and testing
- Training and awareness
- Keys to an effective business continuity management program

9.70 Incident Response and Recovery Testing

Secure-U

Course length: 30 min

Summary

In this course, participants will learn the steps required to develop and implement a business continuity plan so that they may respond more quickly and effectively to the next incident that may disrupt credit union operations. This course will walk participants through a typical incident and response, identifying action steps required as well as recommendations for developing an effective testing program. Whether that incident comes in the form of a cyber event (i.e. malware) or a disruption of service (i.e. power outage), having an outdated plan sitting on a shelf will not be sufficient. This course will teach participants how to form a trained and informed response and recovery team that is ready to take action to restore business operations.

Audience

This course is geared toward credit union professionals responsible for the development and maintenance of their organization's cybersecurity and disaster-recovery plans.

Objectives

By the completion of this course, participants will be able to:

- Outline the sequence of events involved in a typical incident response and recovery effort
- Define the roles and responsibilities needed for an effective response and recovery team
- Outline and prioritize steps required to design and implement a response and recovery testing plan
- List CU*Answers resources and services available to assist in business continuity management program design and implementation

Topics Covered

- The case for business continuity
- The importance of preparation and practice before the next incident occurs
- The changing threat landscape
- Elements of a typical response effort
- Building an incident response and recovery team
- Incident management and communication
- Plan testing and maintenance
 - Determining test scenarios
 - Methods of testing from tabletop exercises to full-scale recovery tests
- Building a culture of continuity

10.00 Data Mining: “Know Your Member” Analysis Tools

Earnings Edge

Course length: 1 hour

Summary

Every good marketing campaign begins with an idea and a target audience. With CU*BASE “Know Your Member” relationship-management tools, data mining is both easy and strategically beneficial.

This course demonstrates how to link products to member needs by using CU*BASE marketing and member-analysis tools as well as how to apply direct-delivery-channel functions to analyze, track, and present member trends.

The software goes beyond just presentation and is designed to promote credit union member service without adding another layer of work for employees. Instead of analyzing trends using separate spreadsheet programs, these features will create new monthly files for trend analysis.

Audience

This course is designed for credit union marketing personnel and all credit union leaders, from supervisors to CEOs.

Objectives

By the completion of this course, participants will be able to:

- Specify, create, and store well-defined member files
- Use CU*BASE to analyze and track trends
- Use “Know Your Member” programs to get a clearer picture of the overall member relationship

Topics Covered

- “Know Your Member” data-analysis tools
- Member List Generator
- Top report tools for the credit union marketer

Note: CU*BASE marketing programs can be utilized separately or strategically combined to meet every credit union’s marketing and communications needs. Be sure to register for the following courses to take advantage of what CU*BASE can do for you:

- 4.12: Member Connect - Building a Communication Network within CU*BASE
- 4.13: Cross Sales & Sales Trackers - Offering Members Relevant Opportunities
- 4.15: Member Service Trackers, Leads, and Follow-Ups

10.01 Relationship Management: Clubs and Tiered Services Programs

Earnings Edge

Course length: 1.5 hours

Summary

How does your credit union reward members who participate as profitable contributors to your credit union's future? Do you simply fee negative activity, or do you encourage positive activity based on the member's best interest?

The CU*BASE Marketing Club and Tiered Services programs have changed the way credit unions work with and reward their member owners.

Audience

This course is designed for marketing staff and credit union leaders.

Objectives

By the completion of this course, participants will be able to:

- Use CU*BASE to identify profitable relationships
- Use positive reinforcement programs to motivate members to participate in credit union offerings
- Use Marketing Clubs and Tiered Services in cross-sales efforts
- Use CU*BASE tools to differentiate their products from those of their competition
- Market Rewards benefits

Topics Covered

- Demographic groups and Marketing Clubs
- The CU*BASE Tiered Services program
- Benefit-payment systems
- Household database
- Mining relationship information
- Online banking options
- Review of suspended club members
- Learn from a Peer for Tiered Services
- Marketing opportunities that lead to cross-sales efforts
- Management reports/dashboards
- Fee waivers/manually waived fees
- Reward points/catalog construction
- Products/services per member

10.02 Dividend Processing and Member Deposits

Earnings Edge

Course length: 1 hour

Summary

This course will show participants creative ways to pay dividends to members. Participants will learn how to create deposit initiatives and offer programs that support donation of funds. Participants will also explore ways to offer rewards in the form of deposits to member accounts based on transaction activity.

Audience

This course is designed for management, accounting, and marketing staff who want to be creative with their dividend-rate offerings while maintaining profitability.

Objectives

By the completion of this course, participants will be able to:

- Identify dividend options
- List options for designing savings products that attract members
- Market new savings products
- Reward members based on behavior
- List key features of savings products and explain how they can be used to boost member loyalty
- Explain how to remain profitable while paying higher rates

Topics Covered

- Qualified dividend processing
- Marketing Club rate benefits
- Debit Card Round-Up processing
- Dividends paid to charities
- Service charges with deposit features
- Surcharge refunds (ATM surcharge rebate, etc.)
- Certificate-processing, bump-rate, and principal-distribution options
- Requiring a secured amount of funds for a specific product
- Adding funds to a certificate
- Changing CD-renewal codes online
- Reviewing dividend reports for marketing opportunities
- Christmas/Vacation Club processing
- Online product management
- Using checklists/new member dashboards for analysis opportunities
- Deposit-item fee opportunities (i.e. business accounts)

10.03 CU*BASE Management Tools: Leadership Dashboards

Earnings Edge

Course length: 1.5 hours

Summary

In this course, participants will learn how powerful CU*BASE tools can collectively form a dashboard of credit union operations. This course is a practical look into how you and your management staff can observe trends, track activities, review profitability, and audit key factors driving your business.

Through investigation of multiple CU*BASE tools, you will begin to formulate a technique to monitor member activity, understand the importance of internal controls, discover deficiencies you may have in your current practices and how to maintain a satisfactory standard of operation.

Audience

This course is targeted at top-level management staff but can be a key tool for any credit union leader, from supervisor to vice president.

Objectives

By the completion of this course, participants will be able to:

- List the tools that collectively form the suite of leadership dashboards
- Set goals based on results found by reviewing CU*BASE dashboards
- Identify methods used in analyzing dashboard data
- Use dashboard data to improve credit union operations
- Create a plan to periodically track information and use it to increase profitability

Topics Covered

- Member spending trends
- Internal controls
- Benchmarking activity
- Understanding member activity
- Understanding member preferences
- Understanding your membership
- Auditing and mining activity
- Key management tool categories:
 - 5300 Call Report Tools (5300)
 - Configuration Functions (CONFIGS)
 - Collections Tools (COLLECT)
 - General Ledger Inquiry & Posting Tools (GL)
 - Teller & Cash Analysis Tools (CASH)
 - Lending/Loan Account Tools (LOANS)
 - Know-Your-Member Analysis Tools (KNOWMBR)
 - Mngmnt Analysis Dashboards & Inquiries (ANALYSIS)
 - Active Beta Development (ACTIVEBETA)
 - Management Forecasting Tools & Reports (FORECAST)
 - Marketing Processing & Analysis Tools (MARKETING)
 - File Maintenance Tools & Monitoring (UPDATE)

11.00 Creating/Improving Your Imaging Strategy

Imaging Solutions

Course length: 1 hour

Summary

This course explores the definition and content of an imaging strategy. Participants will learn why their credit union needs an imaging strategy, what the benefits are, and how to get started. Key components of an imaging strategy are identified and discussed.

Audience

This course is designed for those who are without a current imaging strategy or who want to improve upon their existing strategy.

Objectives

By the completion of this course, participants will be able to:

- State the benefits of an imaging strategy
- Identify key components of an imaging system
- Explain how to get started with an imaging strategy
- List the various solutions available to them as a CU*Answers client
- Explain what is warranted and what is not in relation to the various vaults
- Define imaging-related terms
- List the pros and cons of the various imaging strategies
- List key considerations in selecting an imaging strategy
- List resources that provide additional information and assistance for choosing an imaging strategy

Topics Covered

- Why an imaging strategy is necessary
- Considerations for developing an imaging strategy
- Suggestions on how to go about drafting an imaging strategy
- Components of an imaging strategy
- Vaults
- How to get started and who can help with the implementation of an imaging strategy

11.01 Using CU*BASE Loan Forms with Imaging Solutions

Imaging Solutions

Course length: 1 hour

Summary

This course covers the Imaging Solutions eLoan forms offering. Participants will learn about eLoan form warranties, as well as how to use the eLoan forms program in day-to-day lending operations.

Audience

This course is designed for credit unions that have adopted the online eLoan forms offering and need to be trained on its use. It's also geared toward those who are considering the adoption of online eLoan forms.

Objectives

By the completion of this course, participants will be able to:

- State what is warranted and what is not in relation to eLoan forms
- Describe how eLoan forms can make credit union lending more efficient and improve member service
- Sign in to ProDOC and print sessions
- Capture signatures
- Save signatures
- Capture warranted scanned documents
- Save documents to the archive
- Retrieve documents from the archive
- List typical errors and determine whom to contact
- Perform due diligence on archived images to verify they are archived in the vault

Topics Covered

- How online eLoan forms work
- Hardware requirements
- Software requirements
- Imaging Solutions warranties
- Software features
- Troubleshooting
- How to get support
- Questions and answers

11.02 eSignature Basics

Imaging Solutions

Course length: 1 hour



Summary

If you're not sure where to get started with eSignatures, this course is for you! In this course, participants will learn how to begin implementing eSignatures and how doing so can help them increase their value among members. Participants will learn about tools they can use today to start leveraging eSignatures as a part of their existing imaging strategy. Additionally, the course will include a discussion of legislation that makes the use of eSignatures legal and valid.

Audience

This course is designed for credit unions that have already adopted the use of eSignature and for those that are considering the implementation of eSignatures.

Objectives

By the completion of this course, participants will be able to:

- List the tools involved in using eSignatures
- Describe the eSignature implementation process
- List costs involved in implementing eSignatures
- Explain the basic premise of the Electronic Signatures in Global and National Commerce (E-Sign) Act
- Explain the basic premise of the Uniform Electronic Transactions (UETA) Act

Topics Covered

- eSignature tools
- eSignature implementation process
- eSignature costs
- The Electronic Signatures in Global and National Commerce (E-Sign) Act
- The Uniform Electronic Transactions (UETA) Act

11.03 Introduction to My Virtual StrongBox

Imaging Solutions

Course length: 1 hour



Summary

In this course, participants will learn about My Virtual StrongBox, a secure place to send members receipts and other financial documents that they can easily access within **It's Me 247** Online Banking. Participants will also learn how My Virtual StrongBox can help them increase their value among members, who can use My Virtual StrongBox to not only access important financial documents, but also to securely store and share other types of documents such as driver's licenses and passports.

Audience

This course is designed for credit unions that have already activated My Virtual StrongBox and would like to learn more about it and for those considering activating this service.

Objectives

By the completion of this course, participants will be able to:

- Describe the process of implementing My Virtual StrongBox
- List costs involved in implementing My Virtual StrongBox
- List key similarities and differences between the standard and premium versions of My Virtual StrongBox
- Describe how My Virtual StrongBox can help them reach mobile members

Topics Covered

This course will cover the following topics as they relate to My Virtual StrongBox:

- Implementation process
- Implementation costs
- Standard and premium versions
- Reaching mobile members

11.04 Introduction to the Enhanced Online Vault

Imaging Solutions

Course length: 1 hour



Summary

For credit unions wishing to dive deeper into a paperless process, this course is a “must take.” In this course, participants will learn about the Imaging Solutions Enhanced Online Vault, which offers all the great features of the CU*Spy Online Vault and more. Participants will learn about key features of the Enhanced Online Vault, including the ability to more easily capture documents and keep their entire loan file online, just to name a few!

Audience

This course is designed for current users of the CU*Spy Online Vault who are considering upgrading to the Imaging Solutions Enhanced Online Vault.

Objectives

By the completion of this course, participants will be able to:

- List core features of the Enhanced Online Vault
- Describe key differences between the CU*Spy Online Vault and the Enhanced Online Vault
- Explain the process of implementing the Enhanced Online Vault
- List costs involved in implementing the Enhanced Online Vault

Topics Covered

- Enhanced Online Vault Features
- Differences between the Enhanced Online Vault and the CU*Spy Online Vault
- Enhanced Online Vault implementation process
- Enhanced Online Vault implementation costs

12.00 Standard ATM/Debit Card Platform

SettleMINT EFT

Course length: 1 hour

Summary

The CU*BASE platform for ATM and debit cards is built on a standard that is flexible enough to process transactions for multiple vendors. Processing is controlled by configurations incorporated into screens designed to be powerful yet intuitive. This course will examine the configurations for both PIN- and signature-based vendors, as well as all aspects of maintaining ATM and debit card portfolios.

Audience

This course is geared toward member service representatives, as well as back office and EFT staff.

Objectives

By the completion of this course, participants will be able to:

- List PIN- and signature-based card configuration options
- List ATM and debit card configuration options
- Reissue a card
- Set daily card limits
- Hold funds
- Manage compromised-card lists
- Explain best practices for managing interfaces with vendors

Topics Covered

- ATM/debit card platform
- Tools within the Online ATM/Debit/Credit Card Tools category (PLASTICS)
- PIN- and signature-based vendor configurations
- Stand-in processing, setting daily limits
- BIN setups
- General ledger account recommendations
- Secured-funds-hold configuration
- Cardstock options and embossing rules
- Network activity inquiry
- Understanding vendor configurations
- Best practices for servicing card programs
- Daily and monthly reports

12.01 Online Credit Cards: Loan Creation and Card Embossing

SettleMINT EFT

Course length: 45 min

Summary

In this course, participants will learn how to create and modify a credit card loan after a credit report is pulled. Card embossing will also be explained.

Audience

This course is designed for any staff member who originally sets up the credit card on CU*BASE or who needs to understand the process.

Objectives

By the completion of this course, participants will be able to:

- Set up a credit card loan
- Identify options for modifying a credit card loan
- Define risk-based pricing
- List online credit card products
- List steps involved in card embossing

Topics Covered

- Creating the loan
- Selecting the credit card product
- Pulling the credit report
- Changing categories after the credit report is pulled
- How to handle authorized users

12.02 Online Credit Cards: Daily Maintenance/Reports

SettleMINT EFT

Course length: 1 hour

Summary

In this course, participants will be introduced to daily and monthly reports they should be reviewing. Participants will also learn how to manage changes that may need to be made to CU*BASE loans.

Audience

This course is designed for credit union staff responsible for monitoring and maintaining credit card loans on CU*BASE.

Objectives

By the completion of this course, participants will be able to:

- List the reports that should be viewed and monitored on a daily basis
- Explain procedures involved in account maintenance and restricted-card maintenance
- Explain procedures involved in rate maintenance and payment changes
- Make card updates
- Perform card orders

Topics Covered

- Reports that should be reviewed on a daily basis
- Reports that should be reviewed on a monthly basis
- Adding additional signers
- Choosing the correct credit card product
- Rate maintenance
- Block code maintenance
- Restricted card maintenance
- Update/order cards
- Payment change
- Fixed payments

12.03 Online Credit Cards: On the Front Line

SettleMINT EFT

Course length: 1 hour

Summary

In this course, participants will learn how to find details about credit card accounts through Phone Operator and Account Inquiry. Participants will also learn about making payments and cash advances. Additionally, participants will learn best practices when performing miscellaneous account adjustments.

Audience

This course is designed for all staff members needing to answer questions regarding credit card accounts. It's also geared toward staff members who have the authority to make adjustments to credit card accounts.

Objectives

By the completion of this course, participants will be able to:

- List key features of Phone Operator and Account Inquiry
- Explain the process involved in making payments and cash advances
- Identify delinquent credit card accounts
- Manage delinquent credit card accounts
- Determine which adjustment method to use
- Explain the impact an adjustment can have on a credit card account
- View account history after an adjustment is performed

Topics Covered

- Credit card features within Account Inquiry and Phone Operator
- Delinquent credit card accounts
- Making payments
- Cash advances
- Performing miscellaneous account adjustments for credit card accounts
- The impact that an adjustment has on an account
- How to ensure you're performing the adjustment to achieve the correct results

12.04 **It's Me 247** Bill Pay Powered by Payveris: Product Overview and Daily Management

SettleMINT EFT

Course length: 1 hour

Summary

In this course we will introduce you to the CU*Answers bill payment and bill presentment offering, **It's Me 247** Bill Pay, with transaction processing powered by Payveris. We will discuss support modules for functionality, member enrollment, daily monitoring procedures, and payment methods.

Audience

This course is appropriate for any team member responsible for fielding member questions about **It's Me 247** Bill Pay.

Objectives

By the completion of this course, participants will be able to:

- List payment and debit methods
- Explain bill pay features, including bill presentment, recurring payments, and inquiry features
- Identify methods for setting up a biller
- Perform daily report monitoring

Topics Covered

- Enrollment
- Setting up billers
- Enrolling in eBills
- Setting up recurring payments
- Member fee options
- Viewing history
- Performing an inquiry on an item
- Daily reports
- Changing or cancelling payments

12.05 Online Credit Card Processing: Product Overview

SettleMINT EFT

Course length: 1.5 hours

Summary

In this course, participants will learn about the CU*BASE online credit card system and how to convert their credit card portfolio to an online solution. Participants will also learn about daily responsibilities of servicing online credit cards.

Audience

This course is designed for loan supervisors and loan-product developers.

Objectives

By the completion of this course, participants will be able to:

- Explain the benefits of bringing a credit card program in house
- Identify features of the CU*BASE online credit card system
- Explain the process of converting a credit card portfolio to an online solution
- List daily responsibilities of servicing online credit cards

Topics Covered

- Implementing a credit card program and the conversion process
- Configuration options
- Credit card statement processing
- Creating credit card loans and ordering cards
- Posting credit card payments
- Understanding credit card transaction types
- Rate-maintenance features
- Credit card account maintenance and inquiry
- Credit cards and your collections efforts
- Daily and monthly tasks

12.06 Skip-a-Pay Program Implementation for Online Credit Cards

SettleMINT EFT

Course length: 1 hour

Summary

Skip-a-Pay programs are popular with credit union members, and now you can set up a program in CU*BASE to offer this option to your members. This program is designed for clients offering online credit cards to their members. During this course you will learn how to set up an automated program as well as handle Skip-a-Pay through a manual process.

Audience

This course is geared toward credit union staff who service online credit card portfolios.

Objectives

By the completion of this course, participants will be able to:

- Configure the Skip-a-Pay program
- Compare and contrast the manual and the mass-generated options for offering the Skip-a-Pay program
- Communicate the Skip-a-Pay option to members
- Perform an end-of-month program review
- List reports and techniques for follow-up

Topics Covered

- Skip-a-Pay program
- Skip-a-Pay configuration
- Member opt-in for skip payment
- Timelines for planning the program
- Creating and running a simulation
- Editing a batch prior to posting
- Automation of the program
- Reports and follow-up
- Manual processing
- Best practices to ensure a successful program

12.07 **It's Me 247** Bill Pay Powered by Fiserv: Product Overview and Daily Management

SettleMINT EFT

Course length: 1 hour

Summary

In this course, you will be introduced to the single sign-on bill payment and bill presentment offering, **It's Me 247** Bill Pay powered by Fiserv. Among topics reviewed will be basic functionality, member enrollment, and daily monitoring procedures.

Audience

This course is appropriate for any team member responsible for fielding member questions about **It's Me 247** Bill Pay powered by Fiserv.

Objectives

By the completion of this course, participants will be able to:

- List payment and debit methods
- Explain bill pay features, including bill presentment, recurring payments, and inquiry features
- Identify methods for setting up a biller
- Perform daily report monitoring

Topics Covered

- Risk Model
- Enrollment terms and conditions
- Enrollment process
- Member fee options
 - Default service charge code required
 - Handled by Fiserv
- Daily reports
 - Handled by Fiserv
- Fiserv support

12.08 **It's Me 247** Bill Pay Powered by iPay: Product Overview and Daily Management

SettleMINT EFT

Course length: 1 hour

Summary

In this course, you will be introduced to the single sign-on bill payment and bill presentment offering, **It's Me 247** Bill Pay powered by iPay. Among topics reviewed will be basic functionality, member enrollment, and daily monitoring procedures.

Audience

This course is appropriate for any team member responsible for fielding member questions about **It's Me 247** Bill Pay powered by iPay.

Objectives

By the completion of this course, participants will be able to:

- Define terms and conditions presented at enrollment
- Explain how to use the iPay MASTER site
- Explain how **It's Me 247** Bill Pay and CU*BASE are integrated
- Perform daily report monitoring

Topics Covered

- iPay partnership
- Good Funds model
- Enrollment terms & conditions
 - CU*Answers
 - iPay
- Member-fee options
 - Default service-charge code required
- Member Personal Banker options
- Demo links
 - Overview of online bill pay
 - Interactive tutorial
- Daily reports
- Posting and billing files
- Settlement balancing
- iPay credit union and member support

13.00 Customizing Your Online Experience: **It's Me 247** Online, Mobile, and Text Banking

Internet Retailer Support Center

Course length: 1 hour

Summary

Member self-service financial products continue to dominate the development of technology due to their convenience. Come learn about all the customizable features for your member self-service channels.

Audience

This course is designed for all credit union personnel, from marketing staff to CEOs.

Objectives

By the completion of this course, participants will be able to:

- Explain the basics of **It's Me 247** Online, Mobile, and Text Banking
- List customizable features of **It's Me 247** Online and Mobile Banking
- Explain the process of customizing self-service channels

Topics Covered

- **It's Me 247** Online Banking
- **It's Me 247** Mobile Banking
- Mobile Experience Center
- **It's Me 247** Text Banking
- **It's Me 247** navigation features
- Self-Service Channel Custom Branding Options (SSCCBO)
- Getting started with customization

13.01 Shopping the IRSC Online Store

Internet Retailer Support Center

Course length: 1 hour

Summary

Come find out how the Internet Retailer Support Center (IRSC) can help your credit union become an Internet retailer! In this course, you will learn about options available in the IRSC online store, see what other credit unions have purchased, and discover how to customize your purchases!

Audience

This course is designed for all credit union personnel and all credit union leaders, from marketing to CEOs.

Objectives

By the completion of this course, participants will be able to:

- Explain how their credit union can become an Internet retailer using the IRSC online store
- Explain how to get started using the IRSC online store to shop for products
- Explain how IRSC products and services can be customized

Topics Covered

- Featured IRSC products
- Shopping the IRSC online store
- Products and services that other credit unions have purchased
- FAQs
- IRSC contact information

13.02 MAP/MOP – Applying for Membership Online

Internet Retailer Support Center

Course length: 1 hour

Summary

In this course, participants will learn about the online membership application and the automated membership-opening process that allows a non-member to not only apply for membership, but also perform all the steps necessary to become a credit union member.

Audience

This course is designed for all credit union personnel and all credit union leaders, from marketing to CEOs.

Objectives

By the completion of this course, participants will be able to:

- Explain the difference between MAP and MOP
- Explain the risks involved in implementing an online membership application
- List the steps involved in launching a MAP/MOP site

Topics Covered

- The difference between MAP and MOP
- Launching a MAP/MOP site
- MAP/MOP customizable features
- Future MAP/MOP enhancements

13.03 Launching Your FREE CU*Answers Mobile App

Internet Retailer Support Center

Course length: 1 hour

Summary

If your credit union would like to create a presence across all channels, come learn how to deploy a mobile app to both Apple and Android app stores. With access to mobile banking, your mobile app will have all of the power of a full-featured mobile banking site.

Audience

This course is designed for all credit union personnel and leaders, from marketing staff to CEOs.

Objectives

By the completion of this course, participants will be able to:

- Identify the steps involved in launching the CU*Answers mobile app
- List customizable features of the CU*Answers mobile app
- List enhancements in the pipeline for the CU*Answers mobile app

Topics Covered

- Requirements of the CU*Answers mobile app
- Getting into the queue to launch the CU*Answers mobile app
- Customizable features of the CU*Answers mobile app
- Future enhancements

13.04 Deploying Your Mobile Experience Center (MXC)

Internet Retailer Support Center

Course length: 30 minutes



Summary

Come learn how to deploy your credit union app store, the Mobile Experience Center (MXC). Using the MXC, you can showcase your credit union mobile app offerings and other recommended apps in online banking and on your credit union website. You can even include links to Apple and Google Play stores.

Audience

This course is designed for all credit union personnel.

Objectives

By the completion of this course, participants will be able to:

- Identify apps that can be included in the MXC
- Describe how other credit unions are using the MXC to leverage their presence as an online retailer
- List the steps involved in deploying the MXC

Topics Covered

- Apps that can be included in the MXC
- How other credit unions are using the MXC
- The process of deploying the MXC

14.00 An Overview of Records and Information Management

Course length: 30 minutes



Records & Information Management

Summary

Implementing a records and information management (RIM) program helps credit unions manage their data in a way that meets their business needs and complies with regulations. In this course, participants will learn the basics of developing and implementing an effective RIM program.

Audience

This course is designed for credit union RIM staff and for CEOs.

Objectives

By the completion of this course, participants will be able to:

- Describe RIM
- Define key RIM terms
- Develop and implement a RIM program
- Identify ways in which a RIM program can help credit unions remain in compliance

Topics Covered

- Understanding RIM
- Defining key RIM terms
- Developing and implementing an effective RIM program
- Contributions every credit union staff member can make to ensure their credit union RIM program is in compliance with regulations

14.01 Email Overload - How to Manage It

Course length: 30 minutes



Records & Information Management

Summary

In this day and age where digital communication dominates, credit unions are drowning in email and are spending an increasing amount of time trying to manage it. In this course, participants will learn ways to effectively manage their email overload.

Audience

This course is designed for all credit union personnel and leaders.

Objectives

By the completion of this course, participants will be able to:

- List best practices for managing email
- Identify key components of an effective email policy
- Describe employee responsibilities for managing email
- Explain risks involved in retaining emails beyond the designated retention period

Topics Covered

- Best practices for managing email
- Key components of an effective email policy
- Employee responsibilities for managing email
- Risks involved in keeping emails too long
- Designating staff responsible for retaining incoming and outgoing email messages

15.00 Microsoft Excel for Credit Unions

Course length: 1 hour



Organizational Resource Development

Summary

Microsoft Excel is one of the most important analytical tools in the financial industry. Nearly every credit union staff member can benefit from a basic knowledge of this program and its powerful capabilities. In this course, participants will explore Microsoft Excel and its credit union applications.

Audience

This course is designed for any credit union employee who needs to compile, manipulate, or analyze financial data.

Objectives

By the completion of this course, participants will be able to:

- Define key Excel terminology
- List best practices for structuring data
- List recommendations for maintaining spreadsheet integrity
- Perform basic Excel calculations
- Apply basic Excel formatting
- Create basic Excel formulas
- Incorporate multiple conditions within Excel formulas

Topics Covered

- Excel terminology
- Data structuring best practices
- Recommendations for maintaining spreadsheet integrity
- Data types
- Data formatting
- Custom formats
- Data sorting
- Data grouping
- Subtotals
- Calculated fields
- Tables and named ranges
- Simple formulas
 - Sum
 - Average
 - Count
- The “if” function
- Incorporating multiple conditions within formulas
- Visual representations of data

15.01 Providing First-Class Customer Service to Members

Course length: 1 hour



Organizational Resource Development

Summary

Many say that the key to a successful business is quality customer service, but achieving that can be a challenge. Anticipating, understanding, and satisfying member needs is not easy. In this course, participants will explore the keys to achieving quality customer service for both internal and external customers.

Audience

This course is designed for all credit union personnel and leaders.

Objectives

By the completion of this course, participants will be able to:

- Identify their key customers
- Identify the best communication tools to be used in various circumstances
- Use observation and feedback to hone their approach to customer service

Topics Covered

- The importance of quality customer service
- The common sense approach to customer service
- Key similarities and differences between internal and external customers
- When the different methods of communication matter and when they don't
- Keeping the happy customer happy
- Turning a frustrated customer into a satisfied one
- Measuring customer service success

15.02 Interviewing Skills with a Credit Union Slant

Course length: 1 hour



Organizational Resource Development

Summary

Excellent employee performance starts with excellent employee selection. Asking the right questions, knowing when to dig deeper, and looking for red flags are all part of a successful interview. Designed with credit unions in mind, this class will lead participants through interview basics and guide them through effective candidate selection.

Audience

This course is designed for credit union human resource staff and any credit union staff member responsible for making hiring decisions.

Objectives

By the completion of this course, participants will be able to:

- Identify which questions are best and which ones are to be avoided during interviews
- Ask appropriate follow-up questions during interviews
- Select the best candidate for the job

Topics Covered

- Interview etiquette
- Different interview styles
- Interview tricks of the trade
- Questions and subjects to avoid

15.03 Leadership Essentials for New Supervisors

Course length: 1 hour



Organizational Resource Development

Summary

Becoming a credit union supervisor can be a great career move, but going in unprepared can prove disastrous. Transitioning into a leadership role requires not only a new set of skills, but different priorities as well. This course will show participants how to handle supervisory responsibilities and move forward with confidence.

Audience

This course is designed for any credit union employee who has recently been given a supervisory role for the first time or who is being considered for such a role.

Objectives

By the completion of this course, participants will be able to:

- Identify skills required for a successful transition into a leadership role
- List effective methods of communicating, setting goals, and providing feedback
- List daily responsibilities of a supervisor

Topics Covered

- The importance of establishing oneself early on as a supervisor
- Team building through honest communication
- Day-to-day duties of a supervisor
- Learning from fellow supervisors

15.04 The Art of Coaching

Course length: 1 hour



Organizational Resource Development

Summary

One of the most difficult challenges that a supervisor faces is knowing how to effectively coach an employee who is not performing up to expectations. Helping the employee understand the reason for the coaching and addressing the issue with tact and direction may mean the difference between better performance and disciplinary action. In this course, participants will learn effective coaching skills and the opportunities they present for a better workforce.

Audience

This course is designed for any credit union supervisor.

Objectives

By the completion of this course, participants will be able to:

- Identify early warning signs of potential performance issues
- Describe effective communication techniques for coaching sessions
- List skills needed for successful coaching and mentoring

Topics Covered

- Recognizing early warning signs of potential performance issues
- Communicating effectively during coaching sessions
- Setting realistic improvement goals
- Holding the employee accountable
- Understanding supervisory responsibilities in coaching sessions
- Mentoring for the purpose of team unity

16.00 Data Warehouse Strategies

Asterisk Intelligence

Course length: 1 hour



Summary

This course will introduce participants to the many different data warehouses that CU*Answers offers. It will show participants how to gain optimal results through the careful use and management of these data warehouses. Additionally, participants will learn about opportunities available through the implementation of an external data warehouse strategy.

Audience

This course is designed for database administrators, credit union management teams, marketers, and IT personnel.

Objectives

By the completion of this course, participants will be able to:

- List CU*Answers data warehouses
- Explain how to access data in each of the CU*Answers data warehouses
- Describe opportunities available through the implementation of an external data warehouse strategy

Topics Covered

- CU*Answers data warehouse locations
- CU*Answers data warehouse timing
- CU*Answers data warehouse access

16.01 Educating Your Board with Data

Asterisk Intelligence

Course length: 1 hour



Summary

Credit union board members have access to more data than ever before due to the increasing importance of data in the credit union industry. In this course, participants will learn how to access credit union financial data and how to effectively review this information in a way that allows them and their board members to gain key insights from the data.

Audience

This course is designed for credit union management and board members.

Objectives

By the completion of this course, participants will be able to:

- Describe opportunities available to board members through the effective review and use of data
- Develop an action plan for coaching board members on how to effectively review data
- Educate credit union employees on how to organize data in a way that can easily be digested by board members

Topics Covered

- Board packets and how they can be shaped by CU*BASE data
- CU*Answers data warehouses and how they can be accessed from any device

16.02 Introduction to Analytics Booth

Asterisk Intelligence

Course length: 1 hour



Summary

This course will introduce participants to the Analytics Booth software product, which keeps credit union staff up to date on the latest data about their individual credit union. Participants will learn about core features and how to access them. Additionally, participants will learn how data is captured and how tables and graphs can be customized to meet their needs.

Audience

This course is designed for both new and long-time users of Analytics Booth.

Objectives

By the completion of this course, participants will be able to do the following as it relates to Analytics Booth:

- List core features
- Describe benefits
- Explain limitations
- Apply data filters
- Format data
- View budget groups and general ledger account data
- Explain the source of the data
- Export data

Topics Covered

This course will cover the following topics as they relate to Analytics Booth:

- Features and alerts
- Filters
 - General ledger accounts
 - Budget groups
 - Expanding periods
- Table layouts and display settings
- Graphs
- Exporting data

16.03 Analytics Booth Alerts

Asterisk Intelligence

Course length: 30 minutes



Summary

In this course, participants will learn how to configure Analytics Booth alerts. Participants will additionally learn best practices for creating and distributing Analytics Booth alerts.

Audience

This course is designed for Analytics Booth users.

Objectives

By the completion of this course, participants will be able to do the following as it relates to Analytics Booth:

- Explain alert options
- List alert criteria
- Configure alerts
- Manage alert distributions
- Describe alert best practices

Topics Covered

This course will cover the following topics as they relate to Analytics Booth:

- Configuring alerts
- Managing alert distributions
- Alert best practices

16.04 Audience Considerations for Analytics Booth

Course length: 30 minutes



Asterisk Intelligence

Summary

In this course, participants will discuss potential Analytics Booth audiences. Participants will also consider advantages and disadvantages of providing access to their credit union board, auditors, executives, and staff. Additionally, the course will cover user profiles and security options that contribute to a data-centric culture.

Audience

This course is designed for credit union Analytics Booth administrators as well as credit union decision makers wishing to develop a strategy for data applications.

Objectives

By the completion of this course, participants will be able to do the following as it relates to Analytics Booth:

- List the benefits of adding new audiences
- Describe security features that limit content exposure
- Explain how to capture and store data
- Set up temporary users

Topics Covered

This course will cover the following topics as they relate to Analytics Booth:

- Expanded audiences
- User security and roles
- Temporary users
- Data capture and storage

16.05 Security Considerations for Analytics Booth

Course length: 30 minutes



Asterisk Intelligence

Summary

Sharing credit union financials openly on the Internet can have significant benefits for credit union staff and members, but it also entails risks that need to be carefully considered. In this course, participants will discuss security measures that should be taken when using Analytics Booth.

Audience

This course is designed for both new and long-time users of Analytics Booth.

Objectives

By the completion of this course, participants will be able to do the following as it relates to Analytics Booth:

- Explain security measures that should be taken when using these products
- Explain the process of data scrubbing

Topics Covered

This course will cover the following topics as they relate to Analytics Booth:

- Security measures
- Data scrubbing