



CU\*ANSWERS  
UNIVERSITY

# EDUCATION CATALOG

2021





## A Note from the VP of Education

It looks like 2021 is going to be another very full year of education! You'll see some changes to this year's catalog and the offerings available to your teams.

Our Imaging Solutions Team is now offering their course **11.02 Working with Your Members Remotely** once per quarter. We will also be offering **2.00 CU\*BASE Employee Security** more this year – you'll see this on the schedule six times. Additionally, we have modified time of some of the classes based on last year, adding additional time to some of them to cover more material.

Last year we introduced a new offering, **Teller/Member Service Training Day**. It was such a hit that we're switching it up a bit by breaking it down into two courses, one for Teller Training and one for Member Service Training. This allows us to cover more material in each class, and both are being offered six times this year. We found this to be of great benefit not only for new employees, but also as a refresh for existing tellers and MSRs.

You'll also notice a nice addition to the calendar, starting on Page 37. Although we continue to offer the "Training Scheduled by Category" section, we have modified it to a calendar view to make it easier to use.

We continue to offer our **Education Express and Learning Café** every month. Watch for the content, dates and times that are announced in the monthly Education Newsletter. And speaking of newsletters, beginning in January we'll begin offering a Client Services Newsletter as well.

We will also continue the popular **Asterisk Intelligence Week** that features special training events and courses dedicated to guiding credit unions through the data-analytics and data-warehousing solutions that CU\*Answers offers.

Learn about these training offerings and more in the 2021 Education Catalog, brought to you by the CU\*Answers Client Services & Education team and the CU\*Answers Writing Team!

Sincerely,



Laura S. Welch-Vilker  
Vice President of Client Services & Education



Laura



Client Services & Education

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# Meet the Talent

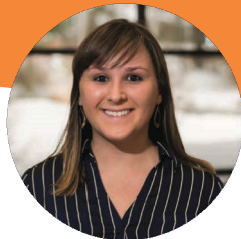
Behind every successful organization is a great team. Here's just a small taste of the big talent we have here at CU\*Answers!

## Client Services & Education Team

From putting together the Education Catalog to answering calls from clients, the Client Services & Education team does a little bit of everything and is a big part of what makes CU\*Answers the successful CUSO it has become.



**Laura**  
VP of Client Services  
& Education



**Kasey**  
Assistant Manager of  
Client Services & Education



**Stephanie**  
Team Lead of Client  
Services



**Lani**  
Team Lead of Education



**Cindy**  
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**Nadine**  
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Representative II



**Jenn**  
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Representative II



**Morgan**  
Client Services & Education  
Representative II



**Bob**  
Client Services & Education  
Representative



**Ashley**  
Client Services & Education  
Representative



**Adam**  
Client Services & Education  
Representative

 **CU\*ANSWERS**  
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 49546.

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## Registration Procedures

- **Classroom Training** – Visit [open.cuanswers.com/classroom](https://open.cuanswers.com/classroom) to register for classroom sessions listed in this catalog. Please note that registration closes two days prior to the course start date. After registering, you will receive a confirmation email. View details about classroom training on *page 7*.
  - **Webinars** – Visit [open.cuanswers.com/webinars](https://open.cuanswers.com/webinars) to register for webinars listed in this catalog. Please note that registration closes two days prior to the course start date. After registering, you will receive a confirmation email. View details about webinar offerings on *page 8*.
  - **Training Events** – Visit [open.cuanswers.com/events](https://open.cuanswers.com/events) to register for many of the special events listed in this catalog. There are some training events that have registration procedures specific to the event. For more information, please see event descriptions beginning on *page 17*.
  - **Other Events Throughout the Year** – Also watch for additions to this calendar all year long! You'll receive an email invitation with registration instructions, 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](mailto:clientnews@cuanswers.com) to be added to this list.
- 

## Training Offered by Request

In addition to offering scheduled training, CU\*Answers also offers training by request. To request this type of training, contact the CU\*Answers Client Services & Education team at [education@cuanswers.com](mailto: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). They will try their best to accommodate your preferences while honoring existing training commitments.

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## Course Times

Most classroom courses are scheduled on weekdays between 9:30 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 Central, Mountain, Pacific and Hawaiian Time Zones.

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## Cost

Except as noted elsewhere in this catalog, all CU\*Answers training is free of charge, including webinars. To request a quote for customized training, contact the CU\*Answers Client Services & Education team at [education@cuanswers.com](mailto:education@cuanswers.com).

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## 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](mailto: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.

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### 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 training schedules beginning on *page 27* and look for “classroom” in the Format column.

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### 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 find courses that offer workshops, look for the “Workshop” heading in the course syllabi.

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### Customized 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. On-site training may incur a fee, including for instructor travel expenses.

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### Incident Response and Awareness Training

As part of its continual commitment to disaster recovery and business resumption, the CU\*Answers Business Continuity Team offers on-site incident response and awareness training. Tailored to meet the needs of each individual credit union, this training program combines talent, skills, and expertise to deliver training that is both effective and relevant to participants’ business objectives. With topics ranging from regulatory requirements to industry best practices, this training program equips participants with the knowledge and skills they need to respond to unexpected incidents and disruptive events. For more information about this offering, visit the CU\*Answers Store at [store.cuanswers.com/product/incident-response-awareness-training](https://store.cuanswers.com/product/incident-response-awareness-training).

## 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.

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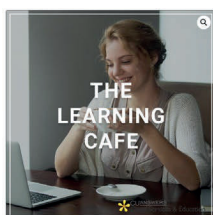
### Webinars

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. For a complete list of pre-scheduled webinars, see the training schedules beginning on *page 27* and look for “webinar” in the Format column.

In addition to offering pre-scheduled webinars, CU\*Answers offers webinars scheduled throughout the year. To register for these webinars, 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](mailto:clientnews@cuanswers.com).

#### Education Express

Held monthly, the brief 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 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.



#### Learning Café

Join these monthly webinar sessions as you enjoy lunch at your desk! Sessions include a discussion of hot topics in the credit union industry such as regulatory updates and compliance best practices. Also discussed are new CU\*BASE tools and features. Learning Café sessions are free to attend.

#### Lender\*VP Hot Topics

Delivered by CU\*Answers lending experts, this monthly webinar series is designed to help participants leverage CU\*BASE lending tools, dashboards, and reports to increase loan product usage and sales. During these brief sessions, participants get a quick overview of the latest CU\*Answers lending products and services and learn how to use them to maximize their success in the area of lending. Participants also learn lending best practices and strategies that will help them harness the power of the CU\*BASE lending toolset.



### CU\*BASE 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.

### Vendor Watch

This monthly webinar series focuses on AuditLink Vendor Management, a service that uses a robust database of vendor intelligence to help clients keep up with regulations surrounding vendor management. In this webinar series, participants learn best practices for vendor due diligence and explore key vendor-management resources. Additionally, participants receive a full demo of the AuditLink vendor-management site and service.



### Xtend Spotlight Series

Held monthly and often multiple times throughout the month, Xtend Spotlight Webinars showcase products, services, and best practices to give credit unions the leading edge. During these 30-minute sessions, participants will get a quick overview of Xtend products and services that are most popular among clients and members and get insider tips on how to maximize their success in the areas of member communications, contact center support, bookkeeping, and mortgage servicing.

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## Online Training Resources

For credit union staff who prefer learning at their own pace and on their own schedule, CU\*Answers University offers online training resources that cover 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 resources.

### Booklets and 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 a Client Services & Education team member receives a client question, they document the answer in AnswerBook. Access this resource at [kb.cuanswers.com/cuanswers/ext/kbsearch.aspx](http://kb.cuanswers.com/cuanswers/ext/kbsearch.aspx).

#### Asking the Right Questions

This online database includes hundreds of frequently asked questions posed by credit union board members to their management team. Understanding the numbers is only part of the process. These questions will help determine whether credit union staff have analyzed the numbers and devised a strategy to move their credit union towards better returns. Visit [asking.cuanswers.com](http://asking.cuanswers.com) to access this resource.

### 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. Download the Building the Factory instructional manuals from the CU\*Answers Store at [store.cuanswers.com/product-category/building-the-factory](https://store.cuanswers.com/product-category/building-the-factory).

### Building the Factory Store

Check out Building the Factory at CU\*Answers

### 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](https://cuanswers.com/resources/doc/cubase-reference).

### It's Me 247 Reference Materials

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 eStatements, online membership applications, and the various online bill pay options that CU\*Answers offers. Access **It's Me 247** reference materials at [cuanswers.com/resources/doc/its-me-247-reference](https://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](https://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](https://cuanswers.com/solutions/accounting/client_invoice) to access this resource.

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## Magazines

### CUSO Magazine

CUSO Magazine is a new digital publication from the cuasterisk.com network. At CUSO Magazine, we're aiming to deliver interesting and entertaining stories on the topics and issues that influence the credit union industry. From strategy articles to client features, opinion pieces and more, we hope you'll read and subscribe. Interested in telling your own credit union's story? Contact us at [editors@cusomag.com](mailto:editors@cusomag.com) to get started! Visit the CUSO Magazine at [cusomag.com](https://cusomag.com).

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## Newsletters

### Education Report Newsletter

This monthly newsletter keeps clients informed of upcoming courses and training events. Visit the CU\*Answers Store at [store.cuanswers.com/product/education-report-sign-up](https://store.cuanswers.com/product/education-report-sign-up) to learn more and to subscribe to this newsletter.



### Lender\*VP Newsletter

With this recurring newsletter, Lender\*VP delivers to your credit union a team of experienced lending professionals that will take over the task of driving the success of your loan department. The Lender\*VP team has years of on-the-street credit union lending experience, combined with an intimate knowledge of CU\*BASE tools.

### 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. Visit [https://visitor.r20.constantcontact.com/manage/optin?v=001whLQo73KzGggNHyrDn\\_q3qlUtbQqtuuE](https://visitor.r20.constantcontact.com/manage/optin?v=001whLQo73KzGggNHyrDn_q3qlUtbQqtuuE) to subscribe.

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## Online Campus

We offer free on-demand courses that you can take any time anywhere. Options for the CU\*Answers University Online Campus are listed below and on the following page.

### Free Campus with Admin Access

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. Many of the courses listed in the training schedules have an on-demand course equivalent, as indicated by the heading "On-Demand Equivalent" on the course syllabus. 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. With administrator access to the free campus, online campus administrators can track learning progress, award certificates of completion, and design individual development plans. To learn more about this resource, visit the CU\*Answers Store at [store.cuanswers.com/product/free-campus-with-admin-access](https://store.cuanswers.com/product/free-campus-with-admin-access).

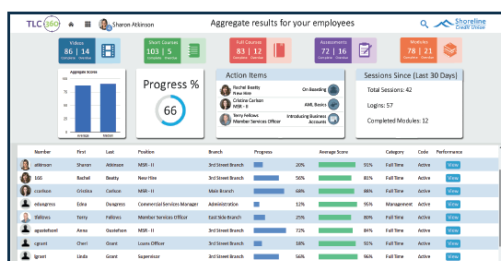




### Full Campus

The expanded campus includes everything the above-mentioned free campus includes, plus more than 100 additional credit union-specific on-

demand courses, a course-authoring tool with which to customize courses with your specific credit union content, branding capabilities, and more! Visit the CU\*Answers Store at [store.cuanswers.com/product/full-campus-edition](https://store.cuanswers.com/product/full-campus-edition) to learn more about this resource.



Managers will love the new administration dashboard that shows them aggregated completions and assessment results for employees in their team, as well as progress and average scores for each employee.

### Online Campus Administrator Training

This 45-minute webinar is a primer for newly designated 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. To be added to this list, contact the CU\*Answers Writing Team at [clientnews@cuanswers.com](mailto:clientnews@cuanswers.com).

## 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. Visit [help.cubase.org/cubase/cubase.htm](https://help.cubase.org/cubase/cubase.htm) to access this resource.

### 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. To access this resource, visit [itsme247.com/help/homebankhelp.htm](https://itsme247.com/help/homebankhelp.htm).

### 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 137 video tutorials for those who learn best by seeing the software in action. Access this resource at [help.cubase.org/steps/steps.htm](https://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 unions learn more about tools used by their operators. It 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](http://help.cubase.org/oper/oper.htm).

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## 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 below and on the following page.

### Cybersecurity Literacy for Credit Union Directors

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 [open.cuanswers/cyber](http://open.cuanswers/cyber).

### Financial Literacy 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](http://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. Visit <https://ondemand.cuanswers.com/> to access this resource.

### OnDemand

Providing access to nearly 497 videos, the CU\*Answers OnDemand site is the main repository for videos on CU\*BASE and related products and services. The site includes CU\*BASE how-to videos, release training webinar recordings, online banking tutorials, client and member marketing videos, CU\*Answers training event videos, and more! Access this resource at [ondemand.cuanswers.com](http://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 137 video tutorials that show clients the ins and outs of CU\*BASE GOLD. With videos on everything from back-office functions to lending tools, the Show Me the Steps video library has a video to answer any question a CU\*BASE user may have. The collection of videos also includes tutorials on member self-service products such as **It's Me 247** Online Banking and the CU\*Answers mobile banking app. To access this resource, visit [help.cubase.org/steps/steps.htm#video\\_tutorials.htm](http://help.cubase.org/steps/steps.htm#video_tutorials.htm).



## Simulated Training Resources

### Bedrock Community Credit Union

With the Bedrock Community Credit Union simulated training environment, CU\*BASE users can practice using the software without the worry of affecting real member data. Bedrock is set up just like a real credit union, but without links to outside vendors. This shared training resource is available to all online credit unions free of charge. Users can add members, modify accounts, and conduct transactions. Configurations are generic, using settings typical to most online clients, and access is limited to basic member service, lending, and accounting functions.

Whether introducing new employees to CU\*BASE or helping existing employees practice new skills, the Bedrock Community Credit Union training environment is perfect for keeping CU\*BASE users up to speed on the tools they'll use every day to serve their members. To request credentials to access Bedrock, contact the CU\*Answers Client Services & Education team at [education@cuanswers.com](mailto:education@cuanswers.com). Visit [open.cuanswers.com/simulation](https://open.cuanswers.com/simulation) to learn more about this resource.

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### 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. For a one-time setup fee plus a monthly maintenance fee, clients can have a copy of their own membership data set up as a training environment, available only to their credit union employees.

CU\*BASE CTE gives credit unions a safe place to practice using CU\*BASE tools, learn new skills, and experiment with new features without the worry of affecting their live member data. And since it's a copy of a credit union's actual files, both the product configurations and member accounts will be familiar and will behave like they do in the credit union's day-to-day environment.

Whether introducing new employees to CU\*BASE or helping existing employees practice new skills, CU\*BASE CTE is perfect for keeping credit unions up to speed on the tools they'll use every day to serve their members. Learn more by visiting the CU\*Answers Store at [store.cuanswers.com/product/cubase-custom-training-edition](https://store.cuanswers.com/product/cubase-custom-training-edition).

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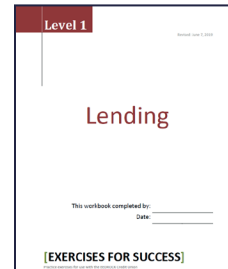
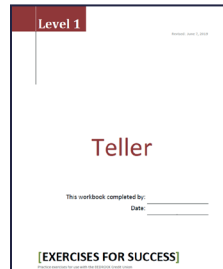
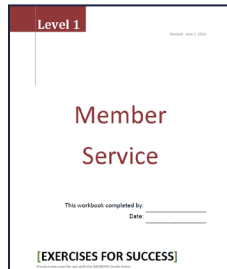
### Exercises for Success

Designed for use with CU\*BASE simulated training environments, this workbook series offers new CU\*BASE users practical experience with common CU\*BASE tasks. The series comprises three workbooks that reinforce key areas of credit union operations: Member Service, Teller Processing, and Lending. Each workbook includes helpful instructions that guide learners in selecting appropriate accounts for use while practicing the activities covered in the booklet.





Activities are based on common member scenarios and are followed by a knowledge check that learners can use to gauge their progress. The workbooks can be downloaded as PDF booklets here: [store.cuanswers.com/product/exercises-for-success](https://store.cuanswers.com/product/exercises-for-success)





## Training Events

For those who would like training that is more intensive and in-depth than a traditional course, CU\*Answers University offers a variety of training events to provide credit union staff the opportunity to dive deeper into specific topics alongside their peers in the cuasterisk.com network. Training event details are listed on the following pages.

Note: Event times are all 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. Contact the CU\*Answers Writing Team at [clientnews@cuanswers.com](mailto:clientnews@cuanswers.com) to be added to this list.

### Training Events at a Glance

Below is a quick alphabetical listing of all training events that CU\*Answers and Xtend offer, along with page numbers where you can find detailed information about each event.

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## Calendar of Special Training Events

Shown below are training event dates. Event details are on the following pages.

University Week	Collections Roundtable Recap
Collections Roundtable	Lender*VP Week
Member Services Training Day	Teller Training Day
Asterisk Intelligence Week	Xtend Shared Branching
Xtension Contact Center Roundtable	Sales & Marketing Roundtable

<p><b>JANUARY</b></p> <p>S M T W T F S</p> <p>1 2</p> <p>3 4 5 6 7 8 9</p> <p>10 11 12 13 14 15 16</p> <p>17 18 19 20 21 22 23</p> <p>24 25 26 27 28 29 30</p> <p>31</p>	<p><b>FEBRUARY</b></p> <p>S M T W T F S</p> <p>1 2 3 4 5 6</p> <p>7 8 9 10 11 12 13</p> <p>14 15 16 17 18 19 20</p> <p>21 22 23 24 25 26 27</p> <p>28</p>	<p><b>MARCH</b></p> <p>S M T W T F S</p> <p>1 2 3 4 5 6</p> <p>7 8 9 10 11 12 13</p> <p>14 15 16 17 18 19 20</p> <p>21 22 23 24 25 26 27</p> <p>28 29 30 31</p>
<p><b>APRIL</b></p> <p>S M T W T F S</p> <p>1 2 3</p> <p>4 5 6 7 8 9 10</p> <p>11 12 13 14 15 16 17</p> <p>18 19 20 21 22 23 24</p> <p>25 26 27 28 29 30</p> <p>31</p>	<p><b>MAY</b></p> <p>S M T W T F S</p> <p>1</p> <p>2 3 4 5 6 7 8</p> <p>9 10 11 12 13 14 15</p> <p>16 17 18 19 20 21 22</p> <p>23 24 25 26 27 28 29</p> <p>30 31</p>	<p><b>JUNE</b></p> <p>S M T W T F S</p> <p>1 2 3 4 5</p> <p>6 7 8 9 10 11 12</p> <p>13 14 15 16 17 18 19</p> <p>20 21 22 23 24 25 26</p> <p>27 28 29 30</p>
<p><b>JULY</b></p> <p>S M T W T F S</p> <p>1 2 3</p> <p>4 5 6 7 8 9 10</p> <p>11 12 13 14 15 16 17</p> <p>18 19 20 21 22 23 24</p> <p>25 26 27 28 29 30 31</p>	<p><b>AUGUST</b></p> <p>S M T W T F S</p> <p>1 2 3 4 5 6 7</p> <p>8 9 10 11 12 13 14</p> <p>15 16 17 18 19 20 21</p> <p>22 23 24 25 26 27 28</p> <p>29 30 31</p>	<p><b>SEPTEMBER</b></p> <p>S M T W T F S</p> <p>1 2 3 4</p> <p>5 6 7 8 9 10 11</p> <p>12 13 14 15 16 17 18</p> <p>19 20 21 22 23 24 25</p> <p>26 27 28 29 30</p> <p>31</p>
<p><b>OCTOBER</b></p> <p>S M T W T F S</p> <p>1 2</p> <p>3 4 5 6 7 8 9</p> <p>10 11 12 13 14 15 16</p> <p>17 18 19 20 21 22 23</p> <p>24 25 26 27 28 29 30</p> <p>31</p>	<p><b>NOVEMBER</b></p> <p>S M T W T F S</p> <p>1 2 3 4 5 6</p> <p>7 8 9 10 11 12 13</p> <p>14 15 16 17 18 19 20</p> <p>21 22 23 24 25 26 27</p> <p>28 29 30</p>	<p><b>DECEMBER</b></p> <p>S M T W T F S</p> <p>1 2 3 4</p> <p>5 6 7 8 9 10 11</p> <p>12 13 14 15 16 17 18</p> <p>19 20 21 22 23 24 25</p> <p>26 27 28 29 30 31</p>

## Asterisk Intelligence Week

Hosted by the CU\*Answers Asterisk Intelligence (AI) team, the events held during this week involve a series of sessions that cover data analytics, data warehousing, and data management solutions. Specific solutions will be covered and general data strategies will be discussed. Use this week's events to begin or deepen your efforts toward using data to help identify weak points or success stories, understand your members and operations, and support or inspire initiatives at your credit union.



*Dates*

- April 26-29
- July 26-29
- September 13-16
- December 6-9

*Location*

This event will be held as a combination of in-person and remote webinar sessions. In-person opportunities will be held at the CU\*Answers corporate office, 6000 28th St. SE, Grand Rapids, MI 49546.

*Registration*

For registration details, please watch for an email invitation.

## CEO School

During this week-long event, CEOs will interact with each other and CU\*Answers CEO Randy Karnes as they learn how CU\*BASE tools can be used to find opportunity. Topics such as building trust with cooperative owners, developing delivery channels for both consumers and owners, building a firm with digital intelligence, and adopting a retail strategy are designed to help credit union senior executives gain new insights for their organizations as well as their own careers.

*Date*

Please watch for an email announcing dates for this event.

*Location*

CU\*Answers, 6000 28th St. SE, Grand Rapids, MI 49546.

*Registration*

For registration details, please watch for an email invitation.



## CEO Strategies

This is a special event designed especially for credit union CEOs, typically held the first full week of November. Although the exact format of the 2020 event has not yet been determined, the focus is on CEO-to-CEO interactions with your peers and CUSO leadership.

<i>Dates</i>	Please watch for an email announcing dates for this event.
<i>Location</i>	Location to be determined. Please watch for an email invitation.
<i>Registration</i>	For registration details, please watch for an email invitation.

## CFO Strategies Roundtable & Accounting Focus Group

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.

- **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 at CU\*Answers. This roundtable is open to CFOs and accounting leadership.
- **Accounting Focus Group** – Collaboration feeds innovation, and as a CUSO, CU\*Answers thrives when clients are involved in the development of its 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.

<i>Date</i>	Please watch for an email announcing dates for this event.
<i>Location</i>	CU*Answers, 6000 28th St. SE, Grand Rapids, MI 49546.
<i>Registration</i>	For registration details, please watch for an email invitation.

## 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.

- **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 summary of hot topics that were discussed at the most recent Roundtable event.

<i>Dates</i>	<i>Collection Roundtable Events:</i>	<i>Roundtable Recap Webinars:</i>
	<ul style="list-style-type: none"> <li>• Feb 16</li> <li>• June 9</li> <li>• Aug 26</li> <li>• Nov 23</li> </ul>	<ul style="list-style-type: none"> <li>• Mar 9</li> <li>• June 23</li> <li>• Sept 9</li> <li>• Dec 7</li> </ul>
<i>Location</i>	The Collections Roundtable is held at CU*Answers: 6000 28th St. SE, Grand Rapids, MI 49546. This event is also hosted via live webcast for those who would like to participate remotely. The Roundtable Recap is offered via webinar.	
<i>Registration</i>	For registration details, please watch for an email invitation.	

## Compliance Training Event

This training event offers participants a full day of training on compliance best practices, regulatory hot topics, and new CU\*BASE auditing tools and features. Participants receive tips on performing risk assessments, discuss examination hot buttons, learn new regulatory rules, and discover the latest cybersecurity strategies. Participants also have the chance to network with their peers in an open roundtable discussion.

<i>Dates</i>	Please watch for an email announcing dates for this event.
<i>Location</i>	For location details, please watch for an email invitation.
<i>Registration</i>	For registration details, please watch for an email invitation.

## Conversations on Compliance

Hosted by the CU\*Answers AuditLink team, 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* Please watch for an email announcing dates for this event.

*Location* CU\*Answers, 6000 28th St. SE, Grand Rapids, MI 49546.

*Registration* For registration details, please watch for an email invitation.

## Imaging Solutions Release Management Roundtable

Geared toward subscribers of the Imaging Solutions Release Management service, this virtual roundtable event offers participants an opportunity to network with peers and discuss hot topics related to the Release Management service. During this virtual forum, participants also explore other services offered by the CU\*Answers Imaging Solutions team.

*Date* Please watch for an email announcing dates for this event.

*Location* Training will be held via webinar.

*Registration* For registration details, please watch for an email invitation.

## Leadership Week

One of the biggest training events that CU\*Answers offers, the annual CU\*Answers Leadership Week welcomes credit union staff from across the country. During the week's events, CU\*BASE clients join the CU\*Answers leadership team to celebrate past achievements and plan for future successes. On the next page are the events that comprise Leadership Week. Learn more at [cuanswers.com/events/lc](https://cuanswers.com/events/lc).

- **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* Please watch for an email announcing dates for this event.

*Location* Events held during Leadership Week will be hosted at various locations in and around the Grand Rapids area. For details, please watch for an email invitation.

*Registration* For registration details, please watch for an email invitation.

## Lender\*VP Week

Held biannually, Lender\*VP Week condenses all CU\*BASE lending courses into one week for those who would like to hone their lending skills and learn about the latest lending tools. To view the list of courses taught during Lender\*VP Week, see the Lender\*VP course syllabi beginning on *page 98*.

**Lender\*VP**

<i>Dates</i>	<ul style="list-style-type: none"> <li>• Summer session: June 28- July 2</li> <li>• Winter session: Dec 13-16</li> </ul>
<i>Location</i>	Training will be held via webinar.
<i>Registration</i>	There is separate registration for each course offered during this event. To register for individual courses, visit <a href="https://www.cuanswers.com/resources/edu/courses/">https://www.cuanswers.com/resources/edu/courses/</a> .

## Member Services Training Day

This Client Services and Education program is geared towards both MSR's and experienced staff seeking information about the Member Service functions in CU\*BASE. For a complete list of courses offered in this half day event, please refer to the Training Schedule beginning on *page 27*.

<i>Dates</i>	<ul style="list-style-type: none"> <li>• January 19</li> <li>• March 22</li> <li>• May 17</li> <li>• July 12</li> <li>• September 20</li> <li>• November 15</li> </ul>
<i>Location</i>	Training will be held via webinar.
<i>Registration</i>	Visit <a href="https://www.cuanswers.com/resources/edu/courses/">https://www.cuanswers.com/resources/edu/courses/</a> to register.

## Sales & Marketing Roundtable

Hosted by Xtend, the biannual Sales & Marketing Roundtable 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.

<i>Dates</i>	Please watch for an email announcing dates for this event.
<i>Location</i>	Xtend, 6000 28th St. SE, Grand Rapids, MI 49546.
<i>Registration</i>	For registration details, please watch for an email invitation.



## Shared Branching Roundtable

The annual Shared Branching Roundtable offers participants the opportunity to engage with peers and discuss questions and concerns about Xtend Shared Branching.

<i>Date</i>	March 17
<i>Location</i>	CU*Answers, 6000 28th St. SE, Grand Rapids, MI 49546.
<i>Registration</i>	For registration details, please watch for an email invitation.

## Teller Training Day

This Client Services and Education program is geared towards both newer Tellers and experienced staff seeking information about the Teller functions in CU\*BASE. For a complete list of courses offered in this half day event, please refer to the Training Schedule beginning on *page 27*.

<i>Dates</i>	<ul style="list-style-type: none"><li>• February 17</li><li>• April 5</li><li>• June 14</li><li>• August 23</li><li>• October 18</li><li>• November 30</li></ul>
<i>Location</i>	Training will be held via webinar.
<i>Registration</i>	Visit <a href="https://www.cuanswers.com/resources/edu/courses/">https://www.cuanswers.com/resources/edu/courses/</a> to register.

## University Week



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

<i>Dates</i>	<ul style="list-style-type: none"><li>• January 25-28</li><li>• April 12-15</li><li>• July 19-22</li><li>• October 4-8</li></ul>
<i>Location</i>	In-person courses will be held at CU*Answers, 6000 28th St. SE, Grand Rapids, MI 49546.
<i>Registration</i>	There is separate registration for each course offered during this event. To register for individual courses, visit <a href="https://www.cuanswers.com/resources/edu/university-weeks/">https://www.cuanswers.com/resources/edu/university-weeks/</a> .

## Xtension Contact Center Roundtable

Held biannually, this event gives contact center experts the opportunity to discuss and consider call center best practices with their peers in the cuasterisk.com network. During this event, participants will have the opportunity to network with other contact center professionals to gain fresh insights and new perspectives to add to their team's action plan.

*Dates*

- April 21
- Sept 15

*Location*

Xtend, 6000 28th St. SE, Grand Rapids, MI 49546.

*Registration*

For registration details, please watch for an email invitation.



## Training Schedule by Date

In this section, you will find all CU\*Answers University courses and training events listed by date. Visit [cuanswers.com/resources/edu/courses](https://cuanswers.com/resources/edu/courses) to register for any of the courses listed here. For training event registration information, refer to the Training Events section beginning on *page 17*.

Date	Start Time	End Time	Course/Event Name	Format
January				
1/12	10:30 AM	11:30 AM	8.00 Managing Compliance Using CU*BASE	Webinar
1/13	3:00 PM	4:00 PM	9.75 Components of an Information Security Program	Webinar
1/14	3:00 PM	4:00 PM	8.07 Monitoring Abnormal Activity	Webinar
1/19	1:00 PM	5:00 PM	Member Services Training Day	Webinar
1/20	3:00 PM	4:00 PM	12.02 Online Credit Cards: Daily Maintenance/Reports	Webinar
1/21	9:30 AM	10:30 AM	8.06 Understanding Credit Union Liability for Security Breaches	Webinar
1/21	2:00 PM	3:00 PM	15.03 Leadership Essentials for New Supervisors	Webinar
University Week (1/25 to 1/28)				
1/25	10:30 AM	12:00 PM	1.01 Member Services: Account Inquiry and Phone Operator	Classroom & Webinar
1/25	3:00 PM	4:00 PM	13.05 Launching Secure Online Form Generator/Request Center	Classroom & Webinar
1/26	9:30 AM	10:30 AM	4.50 Web Accessibility and You	Classroom & Webinar
1/26	3:00 PM	4:00 PM	15.01 Providing First-Class Customer Service to Members	Classroom & Webinar
1/27	9:30 AM	10:30 AM	16.12 Getting Started with Unique Data Management (UDM)	Classroom & Webinar
1/27	1:00 PM	2:00 PM	5.85 Participation Loan Servicing: Understanding the Settlement Process	Classroom & Webinar
1/27	3:00 PM	4:00 PM	7.35 Social Engineering: The Human Side of Security	Classroom & Webinar
1/28	1:00 PM	2:00 PM	4.10 Introduction to CU*BASE Sales & Marketing Tools	Classroom & Webinar
1/28	2:30 PM	3:30 PM	4.12 Member Connect: Building a Communication Network within CU*BASE	Classroom & Webinar
1/28	4:00 PM	5:00 PM	16.13 Introduction to Visual Analytics Tools (VAT)	Classroom & Webinar



Date	Start Time	End Time	Course/Event Name	Format
February				
2/2	10:00 AM	11:00 AM	8.09 Vendor Management 101	Webinar
2/3	2:00 PM	2:30 PM	Vendor Watch	Webinar
2/4	3:00 PM	3:30 PM	9.70 Preparing for a Cybersecurity Incident Response	Webinar
2/9	2:00 PM	3:00 PM	4.15 Member Service Trackers, Leads, and Follow-Ups	Webinar
2/9	3:30 PM	4:30 PM	3.15 Advanced General Ledger	Webinar
2/10	10:00 AM	11:00 AM	11.02 Working with Your Members Remotely	Webinar
2/11	1:30 PM	3:00 PM	3.40 Credit Union Financials: Configuration, Printing, and Other Options	Webinar
2/16	<i>All day</i>		<i>Collections Roundtable</i>	<i>Classroom</i>
2/16	9:30 AM	10:30 AM	1.30 Head Teller Vault/Change Fund Management	Webinar
2/16	11:00 AM	12:00 PM	13.02 MAP/MOP – Applying for Membership Online	Webinar
2/17	1:00 PM	5:00 PM	<i>Teller Training Day</i>	<i>Webinar</i>
2/18	2:00 PM	2:30 PM	Vendor Watch	Webinar
2/24	3:00 PM	4:00 PM	2.00 CU*BASE Employee Security	Webinar
March				
3/4	10:00 AM	11:00 AM	12.03 Online Credit Cards: On the Front Line	Webinar
3/9	2:00 PM	3:00 PM	Collections Roundtable Recap	Webinar
3/9	3:30 PM	4:30 PM	3.20 Balancing Made Easy	Webinar
3/10	2:00 PM	3:00 PM	13.03 Launching Your FREE CU*Answers Mobile App	Webinar
3/16	10:00 AM	11:00 AM	4.40 CU*Statements	Webinar
3/17	<i>To be announced</i>		<i>Xtend Shared Branching</i>	<i>Classroom</i>
3/22	1:00 PM	5:00 PM	<i>Member Services Training Day</i>	<i>Webinar</i>
3/24	2:00 PM	2:30 PM	Vendor Watch	Webinar
3/25	10:30 AM	12:00 PM	4.13 Cross Sales & Sales Trackers: Offering Members Relevant Opportunities	Webinar



Date	Start Time	End Time	Course/Event Name	Format
3/25	2:00 PM	3:30 PM	4.95 Next Suggested Product – Targeted Sales Prompts	Webinar
3/30	11:00 AM	12:00 PM	4.50 Web Accessibility and You	Webinar
April				
<i>Date and time to be announced</i>			<i>Sales &amp; Marketing Roundtable Spring Session</i>	<i>Classroom</i>
<i>4/5</i>	<i>1:00 PM</i>	<i>5:00 PM</i>	<i>Teller Training Day</i>	<i>Webinar</i>
4/6	9:30 AM	10:30 AM	8.08 Internal Controls Best Practices	Webinar
4/7	4:30 PM	5:00 PM	9.65 How to Develop and Test your Business Continuity Plan	Webinar
4/8	10:00 AM	11:00 AM	11.02 Working with Your Members Remotely	Webinar
4/8	3:00 PM	4:00 PM	16.08 Microsoft Excel for Credit Unions	Webinar
<b>University Week (4/12 to 4/15)</b>				
<i>4/12</i>	<i>3:30 PM</i>	<i>5:00 PM</i>	<i>16.04 Report Builder (Query) 1: Working with Computer-Stored Data for Reports &amp; Inquiries</i>	<i>Classroom &amp; Webinar</i>
<i>4/13</i>	<i>10:30 AM</i>	<i>12:00 PM</i>	<i>16.05 Report Builder (Query) 2: Building Custom Reports</i>	<i>Classroom &amp; Webinar</i>
<i>4/13</i>	<i>3:30 PM</i>	<i>4:30 PM</i>	<i>13.05 Launching Secure Online Form Generator/Request Center</i>	<i>Classroom &amp; Webinar</i>
<i>4/14</i>	<i>9:30 AM</i>	<i>11:00 AM</i>	<i>5.81 Introduction to the Loan Fulfillment Center by Accenture</i>	<i>Classroom &amp; Webinar</i>
<i>4/14</i>	<i>11:00 AM</i>	<i>12:00 PM</i>	<i>4.15 Member Service Trackers, Leads, and Follow-Ups</i>	<i>Classroom &amp; Webinar</i>
<i>4/14</i>	<i>2:30 PM</i>	<i>4:00 PM</i>	<i>16.06 Report Builder (Query) 3: Database Files &amp; String Reports</i>	<i>Classroom &amp; Webinar</i>
<i>4/15</i>	<i>9:30 AM</i>	<i>10:30 AM</i>	<i>2.00 CU*BASE Employee Security</i>	<i>Classroom &amp; Webinar</i>
<i>4/15</i>	<i>11:15 AM</i>	<i>12:00 PM</i>	<i>12.01 Online Credit Cards: Loan Creation and Card Embossing</i>	<i>Classroom &amp; Webinar</i>
<i>4/21</i>	<i>To be announced</i>		<i>Xtension Contact Center Roundtable Spring Session</i>	<i>Webinar</i>
<i>4/26</i>	<i>To be announced</i>		<i>Asterisk Intelligence Week (4/26 to 4/29)</i>	<i>Classroom &amp; Webinar</i>
4/27	10:00 AM	11:00 AM	4.94 Making a Splash with Member Statements	Webinar
4/28	10:30 AM	11:30 AM	15.03 Leadership Essentials for New Supervisors	Webinar
4/28	3:30 PM	5:00 PM	1.20 Teller Techniques and Shared-Branching Options	Webinar
4/29	10:30 AM	11:30 AM	15.04 The Art of Coaching	Webinar





Date	Start Time	End Time	Course/Event Name	Format
4/29	2:00 PM	2:30 PM	Vendor Watch	Webinar
May				
5/4	10:30 AM	11:30 AM	8.02 Using CU*BASE Tools for Bank Secrecy Act (BSA) Compliance	Webinar
5/4	3:30 PM	4:30 PM	16.10 CU*BASE Management Tools: Leadership Dashboards	Webinar
5/6	10:00 AM	11:00 AM	16.12 Getting Started with Unique Data Management (UDM)	Webinar
5/6	2:30 PM	3:30 PM	3.25 SRS Bookkeeping Services – Sharing Our Policies and Procedures	Webinar
5/17	1:00 PM	5:00 PM	Member Services Training Day	Webinar
5/19	10:00 AM	11:00 AM	15.05 Conflict Resolution in the Workplace	Webinar
5/25	2:00 PM	2:30 PM	Vendor Watch	Webinar
5/26	3:00 PM	4:00 PM	16.13 Introduction to Visual Analytics Tools (VAT)	Webinar
June				
6/2	4:00 PM	5:00 PM	15.01 Providing First-Class Customer Service to Members	Webinar
6/3	3:00 PM	4:00 PM	3.26 5300 Tools: Call Report Techniques from Xtend SRS	Webinar
6/8	3:00 PM	4:00 PM	4.50 Web Accessibility and You	Webinar
6/9	All day		Collections Roundtable	Classroom
6/9	3:30 PM	4:30 PM	1.30 Head Teller Vault/Change Fund Management	Webinar
6/10	10:30 AM	11:00 AM	1.01 Member Services: Account Inquiry and Phone Operator	Webinar
6/10	3:30 PM	4:30 PM	2.00 CU*BASE Employee Security	Webinar
6/14	1:00 PM	5:00 PM	Teller Training Day	Webinar
6/21	10:30 AM	12:00 PM	4.13 Cross Sales & Sales Trackers: Offering Members Relevant Opportunities	Webinar
6/21	2:00 PM	3:30 PM	4.95 Next Suggested Product – Targeted Sales Prompts	Webinar
6/22	3:00 PM	4:00 PM	7.35 Social Engineering: The Human Side of Security	Webinar
6/23	2:00 PM	2:30 PM	Vendor Watch	Webinar
6/23	3:00 PM	4:00 PM	Collections Roundtable Recap	Webinar



Date	Start Time	End Time	Course/Event Name	Format
6/24	3:30 PM	4:30 PM	8.00 Managing Compliance Using CU*BASE	Webinar
<b><i>Lender*VP Week (6/28 to 7/2)</i></b>				
6/28	9:30 AM	10:30 AM	5.00 Designing CU*BASE Loan Products	Webinar
6/28	11:00 AM	12:00 PM	5.10 Lending from Request to Disbursement: Understanding the Application Process	Webinar
6/28	2:30 PM	4:00 PM	5.11 CU*BASE Mortgage Processing	Webinar
6/29	9:30 AM	10:30 AM	5.12 CU*BASE Escrow Processing	Webinar
6/29	11:00 AM	12:00 PM	5.30 Open-End and Line-of-Credit Lending	Webinar
6/29	2:30 PM	4:00 PM	5.20 Organizing a Loan Department and Servicing Loans on CU*BASE	Webinar
6/30	9:30 AM	10:30 AM	5.40 Managing Bankruptcy	Webinar
6/30	11:00 AM	12:00 PM	5.70 Centralized Underwriting: Inquiry for Loans in Process	Webinar
<b>July</b>				
7/1	2:30 PM	4:00 PM	5.50 Interactive Online Collections	Webinar
7/1	9:30 AM	10:30 AM	5.75 Implementing the 247 Lender Decision Model	Webinar
7/2	11:00 AM	12:00 PM	5.76 Managing Delivery Channels	Webinar
7/2	2:30 PM	4:00 PM	5.79 Real Estate Solutions	Webinar
7/06	10:00 AM	11:00 AM	15.02 Interviewing Skills with a Credit Union Slant	Webinar
7/07	10:30 AM	11:30 AM	16.08 Microsoft Excel for Credit Unions	Webinar
7/12	1:00 PM	5:00 PM	Member Services Training Day	Webinar
7/13	9:30 AM	10:30 AM	4.10 Introduction to CU*BASE Sales & Marketing Tools	Webinar
7/13	1:00 PM	2:00 PM	4.12 Member Connect: Building a Communication Network within CU*BASE	Webinar
7/15	3:30 PM	4:30 PM	15.04 The Art of Coaching	Webinar
<b><i>University Week (7/19 to 7/22)</i></b>				
7/19	9:30 AM	10:00 AM	16.12 Getting Started with Unique Data Management (UDM)	Classroom & Webinar
7/19	10:30 AM	11:30 AM	4.50 Web Accessibility and You	Classroom & Webinar



Date	Start Time	End Time	Course/Event Name	Format
7/20	10:30 AM	11:30 AM	15.03 Leadership Essentials for New Supervisors	Classroom & Webinar
7/20	2:30 PM	3:00 PM	9.65 How to Develop and Test your Business Continuity Plan	Classroom & Webinar
7/20	3:30 PM	4:30 PM	12.02 Online Credit Cards: Daily Maintenance/Reports	Classroom & Webinar
7/21	10:30 AM	11:30 AM	8.07 Monitoring Abnormal Activity	Classroom & Webinar
7/21	2:00 PM	3:00 PM	5.86 Secondary-Market Loan Servicing: Understanding the Settlement Process	Classroom & Webinar
7/21	3:30 PM	4:30 PM	13.05 Launching Secure Online Form Generator/Request Center	Classroom & Webinar
7/22	10:00 AM	11:00 AM	13.03 Launching Your FREE CU*Answers Mobile App	Classroom & Webinar
7/22	4:00 PM	5:00 PM	8.06 Understanding Credit Union Liability for Security Breaches	Classroom & Webinar
7/26	To be announced		Asterisk Intelligence Week (7/26-7/29)	Classroom & Webinar
August				
8/2	4:00 PM	5:00 PM	11.02 Working with Your Members Remotely	Webinar
8/2	2:00 PM	2:30 PM	Vendor Watch	Webinar
8/3	3:00 PM	4:00 PM	8.09 Vendor Management 101	Webinar
8/4	3:30 PM	4:30 PM	3.15 Advanced General Ledger	Webinar
8/5	3:30 PM	5:00 PM	3.40 Credit Union Financials: Configuration, Printing, and Other Options	Webinar
8/12	10:00 AM	11:00 AM	2.00 CU*BASE Employee Security	Webinar
8/18	9:30 AM	10:30 AM	16.13 Introduction to Visual Analytics Tools (VAT)	Webinar
8/19	10:00 AM	11:00 AM	15.05 Conflict Resolution in the Workplace	Webinar
8/19	2:00 PM	3:00 PM	3.25 SRS Bookkeeping Services – Sharing Our Policies and Procedures	Webinar
8/23	1:00 PM	5:00 PM	Teller Training Day	Webinar
8/24	10:00 AM	11:00 AM	13.02 MAP/MOP – Applying for Membership Online	Webinar
8/25	2:00 PM	2:30 PM	Vendor Watch	Webinar
8/26	All day		Collections Roundtable	Classroom
8/31	3:00 PM	4:00 PM	4.50 Web Accessibility and You	Webinar



Date	Start Time	End Time	Course/Event Name	Format
September				
<i>Date and time to be announced</i>			<i>Sales &amp; Marketing Roundtable Fall Session</i>	<i>Classroom</i>
9/2	10:30 AM	11:30 AM	4.15 Member Service Trackers, Leads, and Follow-Ups	Webinar
9/7	10:30 AM	11:30 AM	3.20 Balancing Made Easy	Webinar
9/7	3:30 PM	4:30 PM	4.40 CU*Statements	Webinar
9/9	4:00 PM	5:00 PM	<i>Collections Roundtable Recap</i>	<i>Webinar</i>
9/13	<i>To be announced</i>		<i>Asterisk Intelligence Week (9/13-9/16)</i>	<i>Classroom &amp; Webinar</i>
9/15	<i>To be announced</i>		<i>Xtension Contact Center Roundtable Fall Session</i>	<i>Classroom</i>
9/20	1:00 PM	5:00 PM	<i>Member Services Training Day</i>	<i>Webinar</i>
9/21	9:30 AM	10:00 AM	9.70 Preparing for a Cybersecurity Incident Response	Webinar
9/21	4:00 PM	5:00 PM	5.85 Participation Loan Servicing: Understanding the Settlement Process	Webinar
9/23	2:00 PM	2:30 PM	Vendor Watch	Webinar
9/28	9:30 AM	10:30 AM	15.01 Providing First-Class Customer Service to Members	Webinar
October				
<i>University Week (10/4 to 10/8)</i>				
10/4	9:30 AM	11:00 AM	<i>16.04 Report Builder (Query) 1: Working with Computer-Stored Data for Reports &amp; Inquiries</i>	<i>Classroom &amp; Webinar</i>
10/4	1:30 PM	2:30 PM	<i>8.02 Using CU*BASE Tools for Bank Secrecy Act (BSA) Compliance</i>	<i>Classroom &amp; Webinar</i>
10/4	3:00 PM	4:00 PM	<i>12.03 Online Credit Cards: On the Front Line</i>	<i>Classroom &amp; Webinar</i>
10/5	10:30 AM	12:00 PM	<i>1.20 Teller Techniques and Shared-Branching Options</i>	<i>Classroom &amp; Webinar</i>
10/5	2:00 PM	3:30 PM	<i>16.05 Report Builder (Query) 2: Building Custom Reports</i>	<i>Classroom &amp; Webinar</i>
10/5	4:00 PM	5:00 PM	<i>4.94 Making a Splash with Member Statements</i>	<i>Classroom &amp; Webinar</i>
10/6	1:30 PM	3:00 PM	<i>16.06 Report Builder (Query) 3: Database Files &amp; String Reports</i>	<i>Classroom &amp; Webinar</i>
10/6	3:30 PM	4:30 PM	<i>16.08 Microsoft Excel for Credit Unions</i>	<i>Classroom &amp; Webinar</i>
10/7	11:00 AM	12:00 PM	<i>13.05 Launching Secure Online Form Generator/Request Center</i>	<i>Classroom &amp; Webinar</i>



Date	Start Time	End Time	Course/Event Name	Format
10/7	2:00 PM	3:00 PM	8.08 Internal Controls Best Practices	Classroom & Webinar
10/8	10:30 AM	12:00 PM	4.13 Cross Sales & Sales Trackers: Offering Members Relevant Opportunities	Classroom & Webinar
10/8	2:00 PM	3:30 PM	4.95 Next Suggested Product – Targeted Sales Prompts	Classroom & Webinar
10/14	3:30 PM	4:30 PM	16.12 Getting Started with Unique Data Management (UDM)	Webinar
10/18	1:00 PM	5:00 PM	Teller Training Day	Webinar
10/19	10:15 AM	11:00 AM	12.01 Online Credit Cards: Loan Creation and Card Embossing	Webinar
10/20	3:00 PM	4:00 PM	4.40 CU*Statements	Webinar
10/21	11:00 AM	12:00 PM	15.05 Conflict Resolution in the Workplace	Webinar
10/26	10:30 AM	11:30 AM	15.02 Interviewing Skills with a Credit Union Slant	Webinar
10/26	2:00 PM	2:30 PM	Vendor Watch	Webinar
10/27	10:00 AM	11:00 AM	2.00 CU*BASE Employee Security	Webinar
10/27	3:30 PM	4:30 PM	16.10 CU*BASE Management Tools: Leadership Dashboards	Webinar
10/28	9:30 AM	10:30 AM	4.10 Introduction to CU*BASE Sales & Marketing Tools	Webinar
10/28	1:00 PM	2:00 PM	4.12 Member Connect: Building a Communication Network within CU*BASE	Webinar
November				
11/9	3:30 PM	4:30 PM	3.26 5300 Tools: Call Report Techniques from Xtend SRS	Webinar
11/10	3:00 PM	4:00 PM	11.02 Working with Your Members Remotely	Webinar
11/15	1:00 PM	5:00 PM	Member Services Training Day	Webinar
11/23	All day		Collections Roundtable	Classroom
11/24	2:00 PM	2:30 PM	Vendor Watch	Webinar
11/30	1:00 PM	5:00 PM	Teller Training Day	Webinar
December				
12/1	4:00 PM	5:00 PM	9.75 Components of an Information Security Program	Webinar
12/2	10:00 AM	11:00 AM	15.05 Conflict Resolution in the Workplace	Webinar





Date	Start Time	End Time	Course/Event Name	Format
12/2	3:00 PM	4:30 PM	5.81 Introduction to the Loan Fulfillment Center by Accenture	Webinar
12/6	4 Days		Asterisk Intelligence Week (12/6-12/9)	Classroom & Webinar
12/7	5:00 PM	6:00 PM	Collections Roundtable Recap	Webinar
<b>Lender*VP Week (12/13 to 12/17)</b>				
12/13	9:30 AM	10:30 AM	5.00 Designing CU*BASE Loan Products	Webinar
12/13	11:00 AM	12:00 PM	5.10 Lending from Request to Disbursement: Understanding the Application Process	Webinar
12/13	2:30 PM	4:00 PM	5.11 CU*BASE Mortgage Processing	Webinar
12/14	9:30 AM	10:30 AM	5.12 CU*BASE Escrow Processing	Webinar
12/14	11:00 AM	12:00 PM	5.30 Open-End and Line-of-Credit Lending	Webinar
12/14	2:30 PM	4:00 PM	5.20 Organizing a Loan Department and Servicing Loans on CU*BASE	Webinar
12/15	9:30 AM	10:30 AM	5.40 Managing Bankruptcy	Webinar
12/15	11:00 AM	12:00 PM	5.70 Centralized Underwriting: Inquiry for Loans in Process	Webinar
12/15	2:30 PM	4:00 PM	5.50 Interactive Online Collections	Webinar
12/16	9:30 AM	10:30 AM	5.75 Implementing the 247 Lender Decision Model	Webinar
12/16	11:00 AM	12:00 PM	5.76 Managing Delivery Channels	Webinar
12/16	2:30 PM	4:00 PM	5.79 Real Estate Solutions	Webinar
12/20	10:30 AM	11:30 AM	5.86 Secondary-Market Loan Servicing: Understanding the Settlement Process	Webinar
12/21	9:30 AM	10:30 AM	16.13 Introduction to Visual Analytics Tools (VAT)	Webinar
12/22	10:00 AM	11:00 AM	2.00 CU*BASE Employee Security	Webinar





# Training Schedule by Category

## Calendar of Accounting/Back Office Scheduled Events

Shown below are scheduled training event dates for Accounting/Back Office. Details are within the Course Syllabi. Interested in learning more? Find our “By Request” courses located on Page 71.

3.15 Advanced General Ledger	3.26 5300 Tools: Call Report Techniques from Xtend SRS
3.20 Balancing Made Easy	3.40 Credit Union Financials: Configuration, Printing and Other Options
3.25 SRS Bookkeeping Services- Sharing our Policies and Procedures	3.95 Year-End Planning for ALL Credit Unions

JANUARY							FEBRUARY							MARCH						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2		1	2	3	4	5	6		1	2	3	4	5	6
3	4	5	6	7	8	9	7	8	9	10	11	12	13	7	8	9	10	11	12	13
10	11	12	13	14	15	16	14	15	16	17	18	19	20	14	15	16	17	18	19	20
17	18	19	20	21	22	23	21	22	23	24	25	26	27	21	22	23	24	25	26	27
24	25	26	27	28	29	30	28							28	29	30	31			
31																				
APRIL							MAY							JUNE						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3							1			1	2	3	4	5
4	5	6	7	8	9	10	2	3	4	5	6	7	8	6	7	8	9	10	11	12
11	12	13	14	15	16	17	9	10	11	12	13	14	15	13	14	15	16	17	18	19
18	19	20	21	22	23	24	16	17	18	19	20	21	22	20	21	22	23	24	25	26
25	26	27	28	29	30		23	24	25	26	27	28	29	27	28	29	30			
							30	31												
JULY							AUGUST							SEPTEMBER						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3	1	2	3	4	5	6	7				1	2	3	4
4	5	6	7	8	9	10	8	9	10	11	12	13	14	5	6	7	8	9	10	11
11	12	13	14	15	16	17	15	16	17	18	19	20	21	12	13	14	15	16	17	18
18	19	20	21	22	23	24	22	23	24	25	26	27	28	19	20	21	22	23	24	25
25	26	27	28	29	30	31	29	30	31					26	27	28	29	30		
OCTOBER							NOVEMBER							DECEMBER						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2		1	2	3	4	5	6				1	2	3	4
3	4	5	6	7	8	9	7	8	9	10	11	12	13	5	6	7	8	9	10	11
10	11	12	13	14	15	16	14	15	16	17	18	19	20	12	13	14	15	16	17	18
17	18	19	20	21	22	23	21	22	23	24	25	26	27	19	20	21	22	23	24	25
24	25	26	27	28	29	30	28	29	30					26	27	28	29	30	31	
31																				



## Calendar of Asterisk Intelligence Scheduled Events

Shown below are scheduled training event dates for Asterisk Intelligence. Details are within the Course Syllabi. Interested in learning more? Find our “*By Request*” courses located on Page 177.

16.04 Report Builder (Query) 1: Working with Computer Stored Data for Reports & Inquiries	16.10 CU*BASE Management Tools: Leadership Dashboards
16.05 Report Builder (Query) 2: Building Custom Reports	16.12 Getting Started with Unique Data Management (UDM)
16.06 Report Builder (Query) 3: Database Files & String Reports	16.13 Introduction to Visual Analytics Tools (VAT)
16.08 Microsoft Excel for Credit Unions	

JANUARY							FEBRUARY							MARCH						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2		1	2	3	4	5	6		1	2	3	4	5	6
3	4	5	6	7	8	9	7	8	9	10	11	12	13	7	8	9	10	11	12	13
10	11	12	13	14	15	16	14	15	16	17	18	19	20	14	15	16	17	18	19	20
17	18	19	20	21	22	23	21	22	23	24	25	26	27	21	22	23	24	25	26	27
24	25	26	27	28	29	30	28							28	29	30	31			
31																				

APRIL							MAY							JUNE						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3							1			1	2	3	4	5
4	5	6	7	8	9	10	2	3	4	5	6	7	8	6	7	8	9	10	11	12
11	12	13	14	15	16	17	9	10	11	12	13	14	15	13	14	15	16	17	18	19
18	19	20	21	22	23	24	16	17	18	19	20	21	22	20	21	22	23	24	25	26
25	26	27	28	29	30		23	24	25	26	27	28	29	27	28	29	30			
							30	31												

JULY							AUGUST							SEPTEMBER						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3	1	2	3	4	5	6	7				1	2	3	4
4	5	6	7	8	9	10	8	9	10	11	12	13	14	5	6	7	8	9	10	11
11	12	13	14	15	16	17	15	16	17	18	19	20	21	12	13	14	15	16	17	18
18	19	20	21	22	23	24	22	23	24	25	26	27	28	19	20	21	22	23	24	25
25	26	27	28	29	30	31	29	30	31					26	27	28	29	30		

OCTOBER							NOVEMBER							DECEMBER						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2		1	2	3	4	5	6				1	2	3	4
3	4	5	6	7	8	9	7	8	9	10	11	12	13	5	6	7	8	9	10	11
10	11	12	13	14	15	16	14	15	16	17	18	19	20	12	13	14	15	16	17	18
17	18	19	20	21	22	23	21	22	23	24	25	26	27	19	20	21	22	23	24	25
24	25	26	27	28	29	30	28	29	30					26	27	28	29	30	31	
31																				

## Calendar of Enterprise Risk Management Scheduled Events

Shown below are scheduled training event dates for Enterprise Risk Management. Details are within the Course Syllabi. Interested in learning more? Find our “*By Request*” courses located on Page 128.

8.00 Managing Compliance Using CU*BASE	8.07 Monitoring Abnormal Activity
8.02 Using CU*BASE Tools for Bank Secrecy Act (BSA Compliance)	8.08 Internal Controls Best Practices
8.06 Understanding Credit Union Liability for Security Breaches	8.09 Vendor Management 101
Vendor Watch	

JANUARY							FEBRUARY							MARCH						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2		1	2	3	4	5	6		1	2	3	4	5	6
3	4	5	6	7	8	9	7	8	9	10	11	12	13	7	8	9	10	11	12	13
10	11	12	13	14	15	16	14	15	16	17	18	19	20	14	15	16	17	18	19	20
17	18	19	20	21	22	23	21	22	23	24	25	26	27	21	22	23	24	25	26	27
24	25	26	27	28	29	30	28							28	29	30	31			
31																				

APRIL							MAY							JUNE						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3							1			1	2	3	4	5
4	5	6	7	8	9	10	2	3	4	5	6	7	8	6	7	8	9	10	11	12
11	12	13	14	15	16	17	9	10	11	12	13	14	15	13	14	15	16	17	18	19
18	19	20	21	22	23	24	16	17	18	19	20	21	22	20	21	22	23	24	25	26
25	26	27	28	29	30		23	24	25	26	27	28	29	27	28	29	30			
							30	31												

JULY							AUGUST							SEPTEMBER						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3	1	2	3	4	5	6	7				1	2	3	4
4	5	6	7	8	9	10	8	9	10	11	12	13	14	5	6	7	8	9	10	11
11	12	13	14	15	16	17	15	16	17	18	19	20	21	12	13	14	15	16	17	18
18	19	20	21	22	23	24	22	23	24	25	26	27	28	19	20	21	22	23	24	25
25	26	27	28	29	30	31	29	30	31					26	27	28	29	30		

OCTOBER							NOVEMBER							DECEMBER						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2		1	2	3	4	5	6				1	2	3	4
3	4	5	6	7	8	9	7	8	9	10	11	12	13	5	6	7	8	9	10	11
10	11	12	13		15	16	14	15	16	17	18	19	20	12	13	14	15	16	17	18
17	18	19	20	21	22	23	21	22	23	24	25	26	27	19	20	21	22	23	24	25
24	25	26	27	28	29	30	28	29	30					26	27	28	29	30	31	
31																				



## Calendar of Imaging Solutions Scheduled Events

Shown below are scheduled training event dates for Imaging Solutions. Details are within the Course Syllabi. Interested in learning more? Find our “*By Request*” courses located on Page 145.

### 11.02 Working with Your Members Remotely

JANUARY							FEBRUARY							MARCH						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2		1	2	3	4	5	6		1	2	3	4	5	6
3	4	5	6	7	8	9	7	8	9	10	11	12	13	7	8	9	10	11	12	13
10	11	12	13	14	15	16	14	15	16	17	18	19	20	14	15	16	17	18	19	20
17	18	19	20	21	22	23	21	22	23	24	25	26	27	21	22	23	24	25	26	27
24	25	26	27	28	29	30	28							28	29	30	31			
31																				
APRIL							MAY							JUNE						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2							1			1	2	3	4	5
4	5	6	7	8	9	10	2	3	4	5	6	7	8	6	7	8	9	10	11	12
11	12	13	14	15	16	17	9	10	11	12	13	14	15	13	14	15	16	17	18	19
18	19	20	21	22	23	24	16	17	18	19	20	21	22	20	21	22	23	24	25	26
25	26	27	28	29	30		23	24	25	26	27	28	29	27	28	29	30			
							30	31												
JULY							AUGUST							SEPTEMBER						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2	1	2	3	4	5	6	7				1	2	3	4
4	5	6	7	8	9	10	8	9	10	11	12	13	14	5	6	7	8	9	10	11
11	12	13	14	15	16	17	15	16	17	18	19	20	21	12	13	14	15	16	17	18
18	19	20	21	22	23	24	22	23	24	25	26	27	28	19	20	21	22	23	24	25
25	26	27	28	29	30	31	29	30	31					26	27	28	29	30		
OCTOBER							NOVEMBER							DECEMBER						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2		1	2	3	4	5	6				1	2	3	4
3	4	5	6	7	8	9	7	8	9	10	11	12	13	5	6	7	8	9	10	11
10	11	12	13	14	15	16	14	15	16	17	18	19	20	12	13	14	15	16	17	18
17	18	19	20	21	22	23	21	22	23	24	25	26	27	19	20	21	22	23	24	25
24	25	26	27	28	29	30	28	29	30					26	27	28	29	30	31	
31																				





## Calendar of Internet Retailer Support Center Scheduled Events

Shown below are scheduled training event dates for Internet Retailer Support Center. Details are within the Course Syllabi. Interested in learning more? Find our “*By Request*” courses located on Page 162.

13.02 MAP/MOP: Applying for Memberships Online	13.05 Launching Secure Online Form Generator/Request Center
13.03 Launching Your FREE CU*Answers Mobile App	

JANUARY							FEBRUARY							MARCH						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2		1	2	3	4	5	6		1	2	3	4	5	6
3	4	5	6	7	8	9	7	8	9	10	11	12	13	7	8	9	10	11	12	13
10	11	12	13	14	15	16	14	15	16	17	18	19	20	14	15	16	17	18	19	20
17	18	19	20	21	22	23	21	22	23	24	25	26	27	21	22	23	24	25	26	27
24	25	26	27	28	29	30	28							28	29	30	31			
31																				

APRIL							MAY							JUNE						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3							1			1	2	3	4	5
4	5	6	7	8	9	10	2	3	4	5	6	7	8	6	7	8	9	10	11	12
11	12	13	14	15	16	17	9	10	11	12	13	14	15	13	14	15	16	17	18	19
18	19	20	21	22	23	24	16	17	18	19	20	21	22	20	21	22	23	24	25	26
25	26	27	28	29	30		23	24	25	26	27	28	29	27	28	29	30			
							30	31												

JULY							AUGUST							SEPTEMBER						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3	1	2	3	4	5	6	7				1	2	3	4
4	5	6	7	8	9	10	8	9	10	11	12	13	14	5	6	7	8	9	10	11
11	12	13	14	15	16	17	15	16	17	18	19	20	21	12	13	14	15	16	17	18
18	19	20	21	22	23	24	22	23	24	25	26	27	28	19	20	21	22	23	24	25
25	26	27	28	29	30	31	29	30	31					26	27	28	29	30		

OCTOBER							NOVEMBER							DECEMBER						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2		1	2	3	4	5	6				1	2	3	4
3	4	5	6	7	8	9	7	8	9	10	11	12	13	5	6	7	8	9	10	11
10	11	12	13	14	15	16	14	15	16	17	18	19	20	12	13	14	15	16	17	18
17	18	19	20	21	22	23	21	22	23	24	25	26	27	19	20	21	22	23	24	25
24	25	26	27	28	29	30	28	29	30					26	27	28	29	30	31	
31																				



## Calendar of Lender\*VP Scheduled Events

Shown below are scheduled training event dates for Lender\*VP. Details are within the Course Syllabi. Interested in learning more? Find our “By Request” courses located on Page 98.

5.00 Designing CU*BASE Loan Products	5.30 Open-End Line-of-Credit Lending	5.76 Managing Delivery Channels
5.10 Lending from Request to Disbursement: Understanding the Application Process	5.40 Managing Bankruptcy	5.79 Real Estate Solutions
5.11 CU*BASE Mortgage Processing	5.50 Interactive Online Collections	5.81 Introduction to the Loan Fulfillment Center by Accenture
5.12 CU*BASE Escrow Processing	5.70 Centralized Underwriting: Inquiry for Loans in Process	5.85 Participation Loan Servicing: Understanding the Settlement Process
5.20 Organizing a Loan Dept and Servicing Loans on CU*BASE	5.75 Implementing the 247 Lender Decision Model	5.86 Secondary Market Loan Servicing: Understanding the Settlement Process

JANUARY							FEBRUARY							MARCH						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2		1	2	3	4	5	6		1	2	3	4	5	6
3	4	5	6	7	8	9	7	8	9	10	11	12	13	7	8	9	10	11	12	13
10	11	12	13	14	15	16	14	15	16	17	18	19	20	14	15	16	17	18	19	20
17	18	19	20	21	22	23	21	22	23	24	25	26	27	21	22	23	24	25	26	27
24	25	26	27	28	29	30	28							28	29	30	31			
31																				

APRIL							MAY							JUNE						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3							1			1	2	3	4	5
4	5	6	7	8	9	10	2	3	4	5	6	7	8	6	7	8	9	10	11	12
11	12	13	14	15	16	17	9	10	11	12	13	14	15	13	14	15	16	17	18	19
18	19	20	21	22	23	24	16	17	18	19	20	21	22	20	21	22	23	24	25	26
25	26	27	28	29	30		23	24	25	26	27	28	29	27	28	29	30			
							30	31												

JULY							AUGUST							SEPTEMBER						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3	1	2	3	4	5	6	7				1	2	3	4
4	5	6	7	8	9	10	8	9	10	11	12	13	14	5	6	7	8	9	10	11
11	12	13	14	15	16	17	15	16	17	18	19	20	21	12	13	14	15	16	17	18
18	19	20	21	22	23	24	22	23	24	25	26	27	28	19	20	21	22	23	24	25
25	26	27	28	29	30	31	29	30	31					26	27	28	29	30		

OCTOBER							NOVEMBER							DECEMBER						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2		1	2	3	4	5	6				1	2	3	4
3	4	5	6	7	8	9	7	8	9	10	11	12	13	5	6	7	8	9	10	11
10	11	12	13	14	15	16	14	15	16	17	18	19	20	12	13	14	15	16	17	18
17	18	19	20	21	22	23	21	22	23	24	25	26	27	19	20	21	22	23	24	25
24	25	26	27	28	29	30	28	29	30					26	27	28	29	30	31	
31																				



## Calendar of **Management** Scheduled Events

Shown below are scheduled training event dates for Management. Details are within the Course Syllabi. Interested in learning more? Find our “*By Request*” courses located on Page 61.

### 2.00 CU\*BASE Employee Security

JANUARY							FEBRUARY							MARCH						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2		1	2	3	4	5	6		1	2	3	4	5	6
3	4	5	6	7	8	9	7	8	9	10	11	12	13	7	8	9	10	11	12	13
10	11	12	13	14	15	16	14	15	16	17	18	19	20	14	15	16	17	18	19	20
17	18	19	20	21	22	23	21	22	23	24	25	26	27	21	22	23	24	25	26	27
24	25	26	27	28	29	30	28							28	29	30	31			
31																				
APRIL							MAY							JUNE						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3							1			1	2	3	4	5
4	5	6	7	8	9	10	2	3	4	5	6	7	8	6	7	8	9	10	11	12
11	12	13	14	15	16	17	9	10	11	12	13	14	15	13	14	15	16	17	18	19
18	19	20	21	22	23	24	16	17	18	19	20	21	22	20	21	22	23	24	25	26
25	26	27	28	29	30		23	24	25	26	27	28	29	27	28	29	30			
							30	31												
JULY							AUGUST							SEPTEMBER						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3	1	2	3	4	5	6	7				1	2	3	4
4	5	6	7	8	9	10	8	9	10	11	12	13	14	5	6	7	8	9	10	11
11	12	13	14	15	16	17	15	16	17	18	19	20	21	12	13	14	15	16	17	18
18	19	20	21	22	23	24	22	23	24	25	26	27	28	19	20	21	22	23	24	25
25	26	27	28	29	30	31	29	30	31					26	27	28	29	30		
OCTOBER							NOVEMBER							DECEMBER						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2		1	2	3	4	5	6				1	2	3	4
3	4	5	6	7	8	9	7	8	9	10	11	12	13	5	6	7	8	9	10	11
10	11	12	13	14	15	16	14	15	16	17	18	19	20	12	13	14	15	16	17	18
17	18	19	20	21	22	23	21	22	23	24	25	26	27	19	20	21	22	23	24	25
24	25	26	27	28	29	30	28	29	30					26	27	28	29	30	31	
31																				



## Calendar of Organizational Resource Development Scheduled Events

Shown below are scheduled training event dates for Organizational Resource Development. Details are within the Course Syllabi. Interested in learning more? Find our “*By Request*” courses located on Page 171.

15.01 Providing First-Class Customer Service to Members	15.04 The Art of Coaching
15.02 Interviewing Skills with a Credit Union Slant	15.05 Conflict Resolution in the Workplace
15.03 Leadership Essentials for New Supervisors	

JANUARY							FEBRUARY							MARCH						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2		1	2	3	4	5	6		1	2	3	4	5	6
3	4	5	6	7	8	9	7	8	9	10	11	12	13	7	8	9	10	11	12	13
10	11	12	13	14	15	16	14	15	16	17	18	19	20	14	15	16	17	18	19	20
17	18	19	20	21	22	23	21	22	23	24	25	26	27	21	22	23	24	25	26	27
24	25	26	27	28	29	30	28							28	29	30	31			
31																				

APRIL							MAY							JUNE						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3							1			1	2	3	4	5
4	5	6	7	8	9	10	2	3	4	5	6	7	8	6	7	8	9	10	11	12
11	12	13	14	15	16	17	9	10	11	12	13	14	15	13	14	15	16	17	18	19
18	19	20	21	22	23	24	16	17	18	19	20	21	22	20	21	22	23	24	25	26
25	26	27	28	29	30		23	24	25	26	27	28	29	27	28	29	30			
							30	31												

JULY							AUGUST							SEPTEMBER						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3	1	2	3	4	5	6	7				1	2	3	4
4	5	6	7	8	9	10	8	9	10	11	12	13	14	5	6	7	8	9	10	11
11	12	13	14	15	16	17	15	16	17	18	19	20	21	12	13	14	15	16	17	18
18	19	20	21	22	23	24	22	23	24	25	26	27	28	19	20	21	22	23	24	25
25	26	27	28	29	30	31	29	30	31					26	27	28	29	30		

OCTOBER							NOVEMBER							DECEMBER						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2		1	2	3	4	5	6				1	2	3	4
3	4	5	6	7	8	9	7	8	9	10	11	12	13	5	6	7	8	9	10	11
10	11	12	13	14	15	16	14	15	16	17	18	19	20	12	13	14	15	16	17	18
17	18	19	20	21	22	23	21	22	23	24	25	26	27	19	20	21	22	23	24	25
24	25	26	27	28	29	30	28	29	30					26	27	28	29	30	31	
31																				



## Calendar of Sales & Marketing Scheduled Events

Shown below are scheduled training event dates for Sales and Marketing. Details are within the Course Syllabi. Interested in learning more? Find our “*By Request*” courses located on Page 87.

4.10 Introduction to CU*BASE Sales & Marketing Tools	4.40 CU*Statements
4.12 Member Connect: Building a Communication Network with CU*BASE	4.50 Web Accessibility and You
4.13 Cross Sales & Sales Trackers: Offering Members Relevant Opportunities	4.94 Making a Splash with Member Statements
4.15 Member Service Trackers, leads and Follow-Ups	4.95 Next Suggested Product: Targeted Sales Prompts

JANUARY							FEBRUARY							MARCH						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2		1	2	3	4	5	6		1	2	3	4	5	6
3	4	5	6	7	8	9	7	8	9	10	11	12	13	7	8	9	10	11	12	13
10	11	12	13	14	15	16	14	15	16	17	18	19	20	14	15	16	17	18	19	20
17	18	19	20	21	22	23	21	22	23	24	25	26	27	21	22	23	24	25	26	27
24	25	26	27	28	29	30	28							28	29	30	31			
31																				

APRIL							MAY							JUNE						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3							1			1	2	3	4	5
4	5	6	7	8	9	10	2	3	4	5	6	7	8	6	7	8	9	10	11	12
11	12	13	14	15	16	17	9	10	11	12	13	14	15	13	14	15	16	17	18	19
18	19	20	21	22	23	24	16	17	18	19	20	21	22	20	21	22	23	24	25	26
25	26	27	28	29	30		23	24	25	26	27	28	29	27	28	29	30			
							30	31												

JULY							AUGUST							SEPTEMBER						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3	1	2	3	4	5	6	7				1	2	3	4
4	5	6	7	8	9	10	8	9	10	11	12	13	14	5	6	7	8	9	10	11
11	12	13	14	15	16	17	15	16	17	18	19	20	21	12	13	14	15	16	17	18
18	19	20	21	22	23	24	22	23	24	25	26	27	28	19	20	21	22	23	24	25
25	26	27	28	29	30	31	29	30	31					26	27	28	29	30		

OCTOBER							NOVEMBER							DECEMBER						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2		1	2	3	4	5	6				1	2	3	4
3	4	5	6	7	8	9	7	8	9	10	11	12	13	5	6	7	8	9	10	11
10	11	12	13	14	15	16	14	15	16	17	18	19	20	12	13	14	15	16	17	18
17	18	19	20	21	22	23	21	22	23	24	25	26	27	19	20	21	22	23	24	25
24	25	26	27	28	29	30	28	29	30					26	27	28	29	30	31	
31																				



## Calendar of Secure-U Scheduled Events

Shown below are scheduled training event dates for Secure-U. Details are within the Course Syllabi. Interested in learning more? Find our “*By Request*” courses located on Page 138.

7.35 Social Engineering: The Human Side of Security	9.70 Preparing for a Cybersecurity Incident Response
9.65 How to Develop and Test your Business Continuity	9.75 Components of an Information Security Program

JANUARY							FEBRUARY							MARCH						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2		1	2	3	4	5	6		1	2	3	4	5	6
3	4	5	6	7	8	9	7	8	9	10	11	12	13	7	8	9	10	11	12	13
10	11	12	13	14	15	16	14	15	16	17	18	19	20	14	15	16	17	18	19	20
17	18	19	20	21	22	23	21	22	23	24	25	26	27	21	22	23	24	25	26	27
24	25	26	27	28	29	30	28							28	29	30	31			
31																				

APRIL							MAY							JUNE						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3							1			1	2	3	4	5
4	5	6	7	8	9	10	2	3	4	5	6	7	8	6	7	8	9	10	11	12
11	12	13	14	15	16	17	9	10	11	12	13	14	15	13	14	15	16	17	18	19
18	19	20	21	22	23	24	16	17	18	19	20	21	22	20	21	22	23	24	25	26
25	26	27	28	29	30		23	24	25	26	27	28	29	27	28	29	30			
							30	31												

JULY							AUGUST							SEPTEMBER						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3	1	2	3	4	5	6	7				1	2	3	4
4	5	6	7	8	9	10	8	9	10	11	12	13	14	5	6	7	8	9	10	11
11	12	13	14	15	16	17	15	16	17	18	19	20	21	12	13	14	15	16	17	18
18	19	20	21	22	23	24	22	23	24	25	26	27	28	19	20	21	22	23	24	25
25	26	27	28	29	30	31	29	30	31					26	27	28	29	30		

OCTOBER							NOVEMBER							DECEMBER						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2		1	2	3	4	5	6				1	2	3	4
3	4	5	6	7	8	9	7	8	9	10	11	12	13	5	6	7	8	9	10	11
10	11	12	13	14	15	16	14	15	16	17	18	19	20	12	13	14	15	16	17	18
17	18	19	20	21	22	23	21	22	23	24	25	26	27	19	20	21	22	23	24	25
24	25	26	27	28	29	30	28	29	30					26	27	28	29	30	31	
31																				



## Calendar of SettleMINT EFT Scheduled Events

Shown below are scheduled training event dates for SettleMINT EFT. Details are within the Course Syllabi. Interested in learning more? Find our “*By Request*” courses located on Page 151.

12.01 Online Credit Cards: Loan Creation and Card Embossing	12.03 Online Credit Cards: On the Front Line
12.02 Online Credit Cards: Daily Maintenance/Reports	

JANUARY							FEBRUARY							MARCH						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2		1	2	3	4	5	6		1	2	3	4	5	6
3	4	5	6	7	8	9	7	8	9	10	11	12	13	7	8	9	10	11	12	13
10	11	12	13	14	15	16	14	15	16	17	18	19	20	14	15	16	17	18	19	20
17	18	19	20	21	22	23	21	22	23	24	25	26	27	21	22	23	24	25	26	27
24	25	26	27	28	29	30	28							28	29	30	31			
31																				
APRIL							MAY							JUNE						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3							1			1	2	3	4	5
4	5	6	7	8	9	10	2	3	4	5	6	7	8	6	7	8	9	10	11	12
11	12	13	14	15	16	17	9	10	11	12	13	14	15	13	14	15	16	17	18	19
18	19	20	21	22	23	24	16	17	18	19	20	21	22	20	21	22	23	24	25	26
25	26	27	28	29	30		23	24	25	26	27	28	29	27	28	29	30			
							30	31												
JULY							AUGUST							SEPTEMBER						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3	1	2	3	4	5	6	7				1	2	3	4
4	5	6	7	8	9	10	8	9	10	11	12	13	14	5	6	7	8	9	10	11
11	12	13	14	15	16	17	15	16	17	18	19	20	21	12	13	14	15	16	17	18
18	19	20	21	22	23	24	22	23	24	25	26	27	28	19	20	21	22	23	24	25
25	26	27	28	29	30	31	29	30	31					26	27	28	29	30		
OCTOBER							NOVEMBER							DECEMBER						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2		1	2	3	4	5	6				1	2	3	4
3	4	5	6	7	8	9	7	8	9	10	11	12	13	5	6	7	8	9	10	11
10	11	12	13	14	15	16	14	15	16	17	18	19	20	12	13	14	15	16	17	18
17	18	19	20	21	22	23	21	22	23	24	25	26	27	19	20	21	22	23	24	25
24	25	26	27	28	29	30	28	29	30					26	27	28	29	30	31	
31																				



## Calendar of Teller/Member Service Scheduled Events

Shown below are scheduled training event dates for Teller/Member Service. Details are within the Course Syllabi. Interested in learning more? Find our “*By Request*” courses located on Page 50.

1.01 Member Services: Account Inquiry and Phone Operator	1.20 Teller Techniques and Shared-Branching Options
1.30 Head Teller Vault/Change Fund Management	Teller Training Day
Member Services Training Day	

JANUARY							FEBRUARY							MARCH						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2		1	2	3	4	5	6		1	2	3	4	5	6
3	4	5	6	7	8	9	7	8	9	10	11	12	13	7	8	9	10	11	12	13
10	11	12	13	14	15	16	14	15	16	17	18	19	20	14	15	16	17	18	19	20
17	18	19	20	21	22	23	21	22	23	24	25	26	27	21	22	23	24	25	26	27
24	25	26	27	28	29	30	28							28	29	30	31			
31																				

APRIL							MAY							JUNE						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3							1			1	2	3	4	5
4	5	6	7	8	9	10	2	3	4	5	6	7	8	6	7	8	9	10	11	12
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## Course Syllabi

In this section, you will find a syllabus that corresponds to each course listed in the training schedules as well as those offered by request. Each syllabus lists a brief course description, the audience for whom the course was designed, course objectives, and topics, as well as an on-demand equivalent or supplemental workshop, if applicable. Interested in taking a new or revised course? Look for the star symbol ★ for new courses, the mailbox symbol 📧 for by request courses and the pencil symbol ✎ for revised ones. Interested in a specific course category?

## Course Categories

Below is a quick alphabetical listing of all course categories below, along with the page numbers on which those course syllabi begin.

Accounting/Back Office .....	71
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## Teller/Member Service

Taught by the Client Services & Education team, courses in the Teller/Member Service category are geared toward all credit union staff and 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, Share Drafts, certificate, IRA, and loan products.

### Courses at a Glance

- 0.10 Introduction to CU\*BASE 📖
- 1.00 Introduction to Teller Processing 📖
- 1.01 Member Services: Account Inquiry and Phone Operator 📖
- 1.20 Teller Techniques and Shared-Branching Options
- 1.30 Head Teller Vault/Change Fund Management
- 1.40 Day-to-Day Certificates 📖
- 1.50 Day-to-Day Savings Products 📖
- 1.60 Day-to-Day IRAs 📖
- 1.70 Day-to-Day Loan Servicing 📖
- 1.80 Teller Cash Dispensers, Recyclers, and CU\*BASE 📖

Lani



Client Services & Education

 **CU\*ANSWERS**  
Client Services & Education

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## 0.10 Introduction to CU\*BASE

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1 hour

By Request

Teller/Member Service

### 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

This course covers the following topics:

- 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

---

## 1.00 Introduction to Teller Processing

---

1.5 hours

By Request

Teller/Member Service

### 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

This course covers the following topics:

- 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

---

1.5 hours

Scheduled

Teller/Member Service

### 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

This course covers the following topics:

- 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

---

1.5 hours

Scheduled

Teller/Member Service

### 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

This course covers the following topics:

- 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

---

1 hour

Scheduled

Teller/Member Service

### 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

This course covers the following topics:

- 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

1 hour

By Request

Teller/Member Service

### 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

This course covers the following topics:

- 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





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## 1.50 Day-to-Day Savings Products

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1 hour

By Request

Teller/Member Service

### Summary

The course concentrates on the ancillary savings products that can set a credit union apart from the local market's savings offerings. Topics 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

This course covers the following topics:

- 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

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1 hour

By Request

Teller/Member Service

### Summary

This course concentrates on frontline products and their correlation to IRA management. Topics 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

This course covers the following topics:

- 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

---

1 hour

By Request

Teller/Member Service

### 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

This course covers the following topics:

- 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



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1.5 hours

By Request

Teller/Member Service

### Summary

This course will review the differences in TCDs and TCRs as well as the daily activities for which vaults are used. Topics 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 TCDs or TCRs for transactions, auditing, and balancing.

### Objectives

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

- Explain the difference between TCDs and TCRs
- Perform daily activities related to TCDs and TCRs

- List procedures for balancing and replenishing cash
- Research out-of-balance situations

### Topics









This course covers the following topics:

- The differences between TCDs and TCRs
- Understanding middleware
- Daily activities
- Auditing
- Performing teller transactions and cash transfers
- Replenishing cash
- Balancing
- Handling error messages

## Management

Taught by members of the Client Services & Education team, 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.

### Courses at a Glance

- 2.00 CU\*BASE Employee Security
- 2.10 Designing Savings and Certificate Products 
- 2.11 Introduction to Miscellaneous Member Account Forms 
- 2.30 Rate Maintenance & CU\*BASE Tools for Pricing Products 
- 2.40 Variable-Rate Products and CU\*BASE Tools 
- 2.50 CU\*BASE Operations 
- 2.80 Member Fees and Bundled Services 
- 2.95 CU Budget and Strategic-Planning Tools 
- 2.96 Using AnswerBook to Find Answers and Track Staff Questions 

Geoff



President/COO



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## 2.00 CU\*BASE Employee Security

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1 hour

Scheduled

Management

### 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 focuses 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

This course covers the following topics:

- 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

---

2 hours

By Request

Management

### 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

This course covers the following topics:

- 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

---

2.5 hours

By Request

Management

### Summary

This course is a must for credit union staff who want to design automated member forms in laser-quality format. This course introduces 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

This course covers the following topics:

- 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



---

## 2.30 Rate Maintenance & CU\*BASE Tools for Pricing Products

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1 hour

By Request

Management

### 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

This course covers the following topics:

- 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

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1 hour

By Request

Management

### 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

This course covers the following topics:

- 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

---

1 hour

By Request

Management

### 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

This course covers the following topics:

- 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

---

## 2.80 Member Fees and Bundled Services

---

1.5 hours

By Request

Management

### 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

This course covers the following topics:

- 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

---

1.5 hours

By Request

Management

### 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

This course covers the following topics:

- 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

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## 2.96 Using AnswerBook to Find Answers and Track Staff Questions

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1 hour

By Request

Management

### 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

This course covers the following topics:

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

## Accounting/Back Office

Taught by the Xtend SRS Bookkeeping team, courses in this category were developed for credit union accounting staff and cover topics such as beginning- and end-of-day processing, year-end processing, cash/vault system management, general ledger tools, and daily balancing procedures. Courses in this category also cover 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.

Danielle



Xtend SRS

### Courses at a Glance

- 3.00 Introduction to Accounting 📄
- 3.10 Introduction to General Ledger Tools 📄
- 3.15 Advanced General Ledger
- 3.20 Balancing Made Easy
- 3.25 SRS Bookkeeping Services – Sharing Our Policies and Procedures
- 3.26 5300 Tools: Call Report Techniques from Xtend SRS
- 3.30 Credit Union Checks and Accounts Payable 📄
- 3.40 Credit Union Financials: Configuration, Printing, and Other Options
- 3.50 General Ledger Subsidiary Products: Fixed Assets & Prepaid and Accrued Expenses 📄
- 3.51 General Ledger Subsidiary Products: Working with Investments 📄
- 3.60 Member Checking, Vendor Accounting, and Suspense General Ledger Accounts 📄
- 3.61 Member Payroll Processing 📄
- 3.62 ACH Processing 📄
- 3.95 Year-End Planning for ALL Credit Unions
- 3.96 Preparing for Multi-Corporation Processing 📄



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## 3.00 Introduction to Accounting

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1 hour

By Request

Accounting/Back Office

### 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

This course covers the following topics:

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



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## 3.10 Introduction to General Ledger Tools

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1.5 hours

By Request

Accounting/Back Office

### 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 credit union controls and CU\*BASE functions

### Topics

This course covers the following topics:

- 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

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## 3.15 Advanced General Ledger

---

1 hour

Scheduled

Accounting/Back Office

### 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

This course covers the following topics:

- 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

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## 3.20 Balancing Made Easy

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1 hour

Scheduled

Accounting/Back Office

### 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

This course covers the following topics:

- 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
- CU\*BASE reports available

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## 3.25 SRS Bookkeeping Services – Sharing Our Policies and Procedures

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1 hour

Scheduled

Accounting/Back Office

### 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

This course covers the following topics:

- 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

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## 3.26 5300 Tools: Call Report Techniques from Xtend SRS

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1 hour

Scheduled

Accounting/Back Office

### 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

This course covers the following topics:

- 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



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## 3.30 Credit Union Checks and Accounts Payable

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2 hours

By Request

Accounting/Back Office

### Summary

This course concentrates on issues related to printing and tracking credit union checks. Topics 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

This course covers the following topics:

- 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

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

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1.5 hours

Scheduled

Accounting/Back Office

### 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

This course covers the following topics:

- 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

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

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1.5 hours

By Request

Accounting/Back Office

### 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 outlines the steps for getting started and the preliminary planning required for the implementation phase. The lab allows participants to 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

This course covers the following topics:

- 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



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## 3.51 General Ledger Subsidiary Products: Working with Investments

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1.5 hours

By Request

Accounting/Back Office

### 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 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

This course covers the following topics:

- 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



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

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2 hours

By Request

Accounting/Back Office

### Summary

This course reviews the member checking/share-draft programs and is a must for understanding the basic accounting of overdraft, exception, and reposting options. In this course, participants learn how to clear a draft, set up overdraft protection, and mail an NSF notice, among other tasks. Participants also review the accounting of third-party products such as ACH, ATMs, and member checking accounts.

### 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

This course covers the following topics:

- 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

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## 3.61 Member Payroll Processing

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1 hour

By Request

Accounting/Back Office

### Summary

This course concentrates on the processing of member payroll. Participants learn the basics of creating, maintaining, and tracking payroll records. The course will also show participants CU\*BASE tools that can be used to build a payroll group database.

### 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 steps involved in entering a payroll group
- Explain the process of entering and maintaining payroll information
- List the steps involved in balancing and posting a payroll

- Explain how to track payroll information
- Explain the unique role of payroll processing in the historical growth of credit unions
- Identify CU\*BASE tools used to build a payroll group database

### Topics

This course covers the following topics:

- Entering a payroll group
- Entering/maintaining payroll information
- Balancing and posting a payroll
- Tracking payroll information
- Historical role of payroll processing
- CU\*BASE tools used to build a payroll group database

### On-Demand Equivalent

- CAB 202: Daily Payroll Processing

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## 3.62 ACH Processing

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1 hour

By Request

Accounting/Back Office

### Summary

This course introduces participants to CU\*BASE ACH processing. Participants learn how to enter, maintain, and track ACH information. Participants will also gain a basic understanding of ACH transfers and learn how to use ACH as a credit union settlement tool.

### 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 how to develop an ACH company list
- Define ACH posting rules and techniques
- Explain the basics of ACH transfers
- Describe how ACH can be used as a settlement tool

### Topics

This course covers the following topics:

- Developing an ACH company list
- 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 settlement tool

### On-Demand Equivalent

- CAB 201: Daily ACH Processing



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## 3.95 Year-End Planning for ALL Credit Unions

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1 hour

Date and time to be announced

Accounting/Back Office

### 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

This course covers the following topics:

- Year-end task list

- Tax forms and pricing
- Using member statements as Substitute 1099-INTs
- Bonus dividends and loan-interest rebates
- Year-end 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 tax forms

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## 3.96 Preparing for Multi-Corporation Processing

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1 hour

By Request

Accounting/Back Office

### 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

This course covers the following topics:

- 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

## Sales & Marketing

Taught by the Xtend Communications team, 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.

### Courses at a Glance

- 4.10 Introduction to CU\*BASE Sales & Marketing 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
- 4.40 CU\*Statements
- 4.50 Web Accessibility and You
- 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 🖋️

Liz



Xtend CEO





## 4.10 Introduction to CU\*BASE Sales & Marketing Tools

1 hour

Scheduled

Sales &amp; Marketing

### Summary

In this course, participants learn strategies for reaching members, increasing product usage, and fulfilling member 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

This course covers the following topics:

- 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

### On-Demand Equivalents

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



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

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1 hour

Scheduled

Sales &amp; Marketing

### 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

This course covers the following topics:

- 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

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## 4.13 Cross Sales & Sales Trackers: Offering Members Relevant Opportunities

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1.5 hours

Scheduled

Sales &amp; Marketing

### 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

This course covers the following topics:

- 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



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## 4.15 Member Service Trackers, Leads, and Follow-Ups

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1 hour

Scheduled

Sales &amp; Marketing

### 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

This course covers the following topics:

- 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



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## 4.40 CU\*Statements

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1 hour

Scheduled

Sales &amp; Marketing

### 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

This course covers the following topics:

- 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

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## 4.50 Web Accessibility and You

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1 hour

Scheduled

Sales &amp; Marketing

### Summary

Concerned about your website and web accessibility? Worried about the WCAG 2.0 guidelines and how your website conforms?

CU\*Answers Web Services is launching a new scanning, reporting and remediation service to monitor your website and guide your journey toward conformance.

### Audience

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

### Objectives

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

- Understand web accessibility and the service CU\*Answers provides

### Topics

This course covers the following topics:

- Web Content Accessibility Guidelines
- ADA
- The SiteImprove scanning platform



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## 4.90 Introduction to WordPress with SiteControl

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1 hour

By Request

Sales &amp; Marketing

### 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

This course covers the following topics:

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

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## 4.91 Advanced WordPress with SiteControl

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1 hour

By Request

Sales &amp; Marketing

### 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:

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

### Topics

This course covers the following topics as they relate to WordPress with SiteControl:

- Plugins
- Page templates
- Google Maps
- Building data tables (Table Press)
- Short codes
- Google Analytics
- Custom post types
- Banners
- Mini-features
- Featured rates

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## 4.94 Making a Splash with Member Statements

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1 hour

Scheduled

Sales &amp; Marketing

### 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

This course covers the following topics:

- 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



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## 4.95 Next Suggested Product – Targeted Sales Prompts

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1.5 Hours

Scheduled

Sales &amp; Marketing

### 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

This course covers the following topics:

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



## Lender\*VP

Taught by the Sales & Service team, 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.

Pete



Lender\*VP

### Courses at a Glance

- 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
- 5.15 Investor Relations 📞
- 5.20 Organizing a Loan Department and Servicing Loans on CU\*BASE
- 5.30 Open-End and Line-of-Credit Lending
- 5.40 Managing Bankruptcy
- 5.50 Interactive Online Collections
- 5.70 Centralized Underwriting: Inquiry for Loans in Process
- 5.71 Laser Forms Management 📞
- 5.75 Implementing the 247 Lender Decision Model
- 5.76 Managing Delivery Channels
- 5.79 Real Estate Solutions
- 5.80 Participation Lending Strategies 📞
- 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



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## 5.00 Designing CU\*BASE Loan Products

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1.5 hours

Scheduled

Lender\*VP

### 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

This course covers the following topics:

- 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



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## 5.10 Lending from Request to Disbursement: Understanding the Application Process

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1 hour

Scheduled

Lender\*VP

### 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. In this course, participants are introduced to the interactive CU\*BASE lending database that tracks the member’s application information the entire time the member is active.

### 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

This course covers the following topics:

- 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



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## 5.11 CU\*BASE Mortgage Processing

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1.5 hours

Scheduled

Lender\*VP

### 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

This course covers the following topics:

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

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## 5.12 CU\*BASE Escrow Processing

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1.5 hours

Scheduled

Lender\*VP

### 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 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:

- Set up an escrow account

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

### Topics

This course covers the following topics:

- 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)

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## 5.15 Investor Relations

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1 hour

By Request

Lender\*VP

### Summary

Investor opportunities take a variety of forms. In this course This course also covers 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

This course covers the following topics:

- 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



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

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1.5 hours

Scheduled

Lender\*VP

### 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

This course covers the following topics:

- 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





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## 5.30 Open-End and Line-of-Credit Lending

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1 hour

Scheduled

Lender\*VP

### 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

This course covers the following topics:

- 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



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## 5.40 Managing Bankruptcy

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1.5 hours

Scheduled

Lender\*VP

### 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
- Code a credit bureau file

- Maintain bankrupt accounts in such a way as to preserve information needed by the court
- Track bankrupt accounts through Tracker processing
- Create a write-off account

### Topics

This course covers the following topics:

- 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



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## 5.50 Interactive Online Collections

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1.5 hours

Scheduled

Lender\*VP

### 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 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

This course covers the following topics:

- 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 Equivalents

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



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## 5.70 Centralized Underwriting: Inquiry for Loans in Process

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1 hour

Scheduled

Lender\*VP

### 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

This course covers the following topics:

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

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## 5.71 Laser Forms Management

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1.5 hours

By Request

Lender\*VP

### 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:

- Identify forms hardware options

- 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

### Topics

This course covers the following topics:

- 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



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## 5.75 Implementing the 247 Lender Decision Model

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1 hour

Scheduled

Lender\*VP

### 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 must 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

This course covers the following topics:

- 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.



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## 5.76 Managing Delivery Channels

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1 hour

Scheduled

Lender\*VP

### 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 be able to:

- 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

This course covers the following topics:

- 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.



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## 5.79 Real Estate Solutions

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1.5 hours

Scheduled

Lender\*VP

### 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:

- Identify mortgage-servicing tools available in CU\*BASE

- Explain web-based mortgage application and processing solutions offered by CU\*Answers

### Topics

This course covers the following topics:

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



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## 5.80 Participation Lending Strategies

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1 hour

By Request

Lender\*VP

### Summary

Participation opportunities take a variety of forms. In this course This course also covers 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

This course covers the following topics:

- 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

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## 5.81 Introduction to the Loan Fulfillment Center by Accenture

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1.5 hours

Scheduled

Lender\*VP

### Summary

This course will provide an overview of the Loan Fulfillment Center, available through the Mortgage Cadence Cloud. Participants learn how the Loan Fulfillment Center platform can benefit members and credit unions. As a provider of the platform, CU\*Answers can 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

This course covers the following topics:

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



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## 5.85 Participation Loan Servicing: Understanding the Settlement Process

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1 hour

Scheduled

Lender\*VP

### 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:

- Explain the investor settlement process

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

### Topics

This course covers the following topics:

- 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)



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## 5.86 Secondary-Market Loan Servicing: Understanding the Settlement Process

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1 hour

Scheduled

Lender\*VP

### 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





This course covers the following topics:

- 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)

## Self-Processing

Taught by the Client Services & Education team, courses in this category were designed exclusively for CU\*Answers self-processing credit unions. Course topics include organizing and managing an operations center, iSeries system security, hardware management, and year-end planning.

### Courses at a Glance

- 6.00 Organizing and Managing Your Operations Center 
- 6.10 iSeries System Security 
- 6.20 iSeries Management and System Tools 
- 6.30 Managing Your Hardware Resources and Relationships 

Jeff



OpsEngine



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## 6.00 Organizing and Managing Your Operations Center

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3 hours

By Request

Self-Processing

### 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

This course covers the following topics:

- 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 recover

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## 6.10 iSeries System Security

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2 hours

By Request

Self-Processing

### 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

This course covers the following topics:

- 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

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## 6.20 iSeries Management and System Tools

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3 hours

By Request

Self-Processing

### 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

This course covers the following topics:

- 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



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## 6.30 Managing Your Hardware Resources and Relationships

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1.5 hours

By Request

Self-Processing

### 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 they 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





This course covers the following topics:

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

## Network Services

Taught by the Network Services team, courses in this category were developed primarily for credit union information technology staff. Course topics include hardware and communications, CU\*BASE updates and support, and software configuration.

### Courses at a Glance

- 7.00 CU\*BASE GOLD: Customizable Features/Tools 
- 7.15 CU\*BASE Hardware & Communications 
- 7.20 CU\*BASE GOLD Updates and Support 
- 7.25 Configuring CU\*BASE Software 
- 7.35 Social Engineering: The Human Side of Security

Dave



Network Services



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## 7.00 CU\*BASE GOLD: Customizable Features/Tools



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1 hour

By Request

Network Services

### Summary

CU\*BASE GOLD offers flexibility and power to customize your workstation to fit the way you work. This course shows 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

This course covers the following topics:

- 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

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## 7.15 CU\*BASE Hardware & Communications

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1 hour

By Request

Network Services

### 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

This course covers the following topics:

- 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

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## 7.20 CU\*BASE GOLD Updates and Support

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1 hour

By Request

Network Services

### 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 learn how the update process works. Participants 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

This course covers the following topics:

- 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

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## 7.25 Configuring CU\*BASE Software

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1 hour

By Request

Network Services

### 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

This course covers the following topics:

- 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



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## 7.35 Social Engineering: The Human Side of Security

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1 hour

Scheduled

Secure-U

### Summary

In this course, participants 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

This course covers the following topics:

- 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



## Enterprise Risk Management

Taught by the AuditLink team, courses in this category are geared toward a variety of credit union personnel and cover topics such 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.

### Courses at a Glance

- 8.00 Managing Compliance Using CU\*BASE
- 8.02 Using CU\*BASE Tools for Bank Secrecy Act (BSA) Compliance
- 8.03 Key Factors to Evaluate in Your Agreements 
- 8.04 Using CU\*BASE to Calculate Risk 
- 8.05 Fundamentals of Enterprise Risk Management 
- 8.06 Understanding Credit Union Liability for Security Breaches
- 8.07 Monitoring Abnormal Activity
- 8.08 Internal Controls Best Practices
- 8.09 Vendor Management 101

Jim



AuditLink

# AuditLink





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## 8.00 Managing Compliance Using CU\*BASE

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1 hour

Scheduled

Enterprise Risk Management

### Summary

In this course, participants 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

This course covers the following topics:

- 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

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

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1 hour

Scheduled

Enterprise Risk Management

### 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

This course covers the following topics:

- 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



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## 8.03 Key Factors to Evaluate in Your Agreements

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1 hour

By Request

Enterprise Risk Management

### 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

This course covers the following topics:

- Considerations for vendor evaluations
- Member-agreement concerns



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## 8.04 Using CU\*BASE to Calculate Risk

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1 hour

By Request

Enterprise Risk Management

### 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

This course covers the following topics:

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

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## 8.05 Fundamentals of Enterprise Risk Management



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1 hour

By Request

Enterprise Risk Management

### 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

This course covers the following topics:

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



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## 8.06 Understanding Credit Union Liability for Security Breaches

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1 hour

Scheduled

Enterprise Risk Management

### 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

This course covers the following topics:

- Negligence
- UCC 4A
- Consumer notification laws

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## 8.07 Monitoring Abnormal Activity

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1 hour

Scheduled

Enterprise Risk Management

### 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

This course covers the following topics:

- 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



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## 8.08 Internal Controls Best Practices

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1 hour

Scheduled

Enterprise Risk Management

### 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

This course covers the following topics:

- 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





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## 8.09 Vendor Management 101

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1 hour

Scheduled

Enterprise Risk Management

### Summary

This course covers 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

This course covers the following topics:

- 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

## Secure-U

Taught primarily by the Business Continuity team, courses in this category were designed for all credit union personnel and cover important security-related topics such as social engineering, business continuity, and incident response.

### Courses at a Glance

- 9.65 How to Develop and Test your Business Continuity Plan
- 9.70 Preparing for a Cybersecurity Incident Response
- 9.75 Components of an Information Security Program

*Jim*



*Business Continuity*



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## 9.65 How to Develop and Test your Business Continuity Plan

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30 minutes

Scheduled

Secure-U

### Summary

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 standalone recovery plan.

This course provides an overview of business continuity planning and the steps required to develop and implement an ongoing business continuity program based on industry guidelines and best practices.

### Audience

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

### Objectives

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

- Determine and plan for the scenarios that threaten to disrupt business operations

- Describe the steps necessary to develop, implement, and test a Business Continuity Plan
- Define the roles and responsibilities of an effective Business Recovery Team
- Know how to prioritize and recover critical business functions
- Improve staff's preparedness level through awareness training
- Become familiar with services and resources available from CU\*Answers designed to assist

### Topics

This course covers the following topics:

- Business Continuity – an introduction and value statement
- Conducting a Business Impact Assessment
- Determining appropriate continuity and recovery strategies
- Staff training and awareness
- How and when to update your plan
- Recovery testing and reporting
- Tips for an effective Business Continuity Program

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## 9.70 Preparing for a Cybersecurity Incident Response

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30 minutes

Scheduled

Secure-U

### Summary

Whether the incident comes in the form of a cyber event (malware) or a disruption of service (power outage), having an outdated incident response plan sitting on a shelf will not be sufficient.

In this course, participants will learn the steps required to develop, implement, and test their Incident Response Plan with the goal of responding more quickly and effectively to the next incident that threatens to disrupt credit union operations. This course will walk participants through a typical response and show them the steps required to detect, contain, remediate, and recover from a threat.

Participants also learn how to form an effective Incident Response Team, one that is prepared to take action and 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 of an effective Incident Response Team
- Outline and prioritize steps required to design and implement an Incident Response Plan
- Identify CU\*Answers incident response resources and services

### Topics

This course covers the following topics:

- The case for incident response planning
- Anatomy of a cyber attack
- Elements of an Incident Response Plan (IRP)
- Roles of Incident Response Team (IRT) members



## 9.75 Components of an Information Security Program

1 hour

Scheduled

Secure-U

### Summary

Chances are your Information Security Program has changed over the years to adjust to the demands of auditors and regulatory examiners without fully understanding how each component fits in the overall strategy or contributes to your credit union's security posture.

This course was designed to take a step back and approach the Information Security planning process from a business perspective. Participants will learn the components of a comprehensive InfoSec Program, understand the role and purpose of each for mitigating risk to IT assets, and identify gaps and weaknesses in existing strategies and controls.

### Audience

This course is geared toward credit union professionals responsible for the development and maintenance of their organization's Cybersecurity and Business Continuity Plans.

### Objectives

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

- Understand the need to protect the confidentiality, integrity, and availability of sensitive data and the systems that host and process the data
- Describe the components of an effective Information Security Program

- Recognize the different types of controls used to mitigate risk
  - Administrative
  - Technical/Logical
  - Physical
- Identify the tools available to assess and audit existing controls and to measure the maturity of your Information Security Program
- Design a roadmap to improve your credit union's cybersecurity posture
- Become familiar with services and resources available from CU\*Answers designed to assist

### Topics

This course covers the following topics:

- Acknowledging the threat landscape
- Reviewing the security standards and guidelines for credit unions
- Identifying the components of a comprehensive Information Security Program
- Assessing control effectiveness
- Prevention, detection, and incident response
- Steps to improve staff security hygiene

## Earnings Edge

Taught by the Asterisk Intelligence team, courses in this category are geared primarily toward credit union marketing personnel and leadership staff. Course topics include CU\*BASE data-analysis tools, Clubs and Tiered Service programs, and dividend processing.

### Courses at a Glance

- 10.01 Relationship Management: Clubs and Tiered Services Programs 📖
- 10.02 Dividend Processing and Member Deposits 📖

Keegan



Professional Services



EarningsEdge

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## 10.01 Relationship Management: Clubs and Tiered Services Programs

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1.5 hours

By Request

Earnings Edge

### 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
- Market Rewards benefits

- Use CU\*BASE tools to differentiate their products from those of their competition

### Topics

This course covers the following topics:

- 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

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## 10.02 Dividend Processing and Member Deposits

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1 hour

By Request

Earnings Edge

### Summary

This course shows participants creative ways to pay dividends to members. Participants 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

This course covers the following topics:





- 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 for business accounts



## Imaging Solutions

Taught by the Imaging Solutions team, courses in this category introduce credit union staff to imaging products and services such as eLoan forms, eSignatures, Virtual StrongBox, and online vaults.

### Courses at a Glance

- 11.00 Creating/Improving Your Imaging Strategy 
- 11.01 Using CU\*BASE Loan Forms with Imaging Solutions 
- 11.02 Working with Your Members Remotely
- 11.03 CU\*BASE Data-Retention Issues 
- 11.04 CU\*Spy Online Reports and Statement Retrieval 

John



Imaging Solutions



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## 11.00 Creating/Improving Your Imaging Strategy

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1 hour

By Request

Imaging Solutions

### Summary

This course explores the definition and content of an imaging strategy. Participants 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
- Define imaging-related terms

- Explain what is warranted and what is not in relation to the various vaults
- 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

This course covers the following topics:

- 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

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## 11.01 Using CU\*BASE Loan Forms with Imaging Solutions

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1 hour

By Request

Imaging Solutions

### Summary

This course covers the Imaging Solutions eLoan forms offering. Participants 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

This course covers the following topics:

- How online eLoan forms work
- Hardware requirements
- Software requirements
- Imaging Solutions warranties
- Software features
- Troubleshooting
- How to get support
- Questions and answers

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## 11.02 Working with Your Members Remotely

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1 hour

Scheduled

Imaging Solutions

### Summary

In this course, participants learn the ins and outs of imaging options designed to allow credit unions to work with members remotely. Participants learn how to begin implementing eSignatures, Virtual StrongBox, and Enhanced Online Vault and how these tools can help them significantly increase their value among members.

### Audience

This course is designed for credit union staff interested in options that allow them to work with members remotely.

### Objectives

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

- Describe eSignature implementation and costs
- List the tools involved in using eSignatures
- Describe Virtual StrongBox implementation and costs
- List key similarities and differences between the standard and premium versions of Virtual StrongBox

- Describe Enhanced Online Vault implementation and costs
- List core features of Enhanced Online Vault
- Describe key differences between CU\*Spy Online Vault and Enhanced Online Vault

### Topics

This course covers the following topics:

- eSignature tools
- eSignature implementation process
- eSignature costs
- Virtual StrongBox implementation process
- Virtual StrongBox costs
- Virtual StrongBox standard and premium versions
- Virtual Closing Rooms
- Enhanced Online Vault implementation process
- Enhanced Online Vault costs
- Enhanced Online Vault features
- Differences between Enhanced Online Vault and CU\*Spy Online Vault

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## 11.03 CU\*BASE Data-Retention Issues

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1 hour

By Request

Imaging Solutions

### Summary

Few things are as frustrating as having to hunt through printouts to respond to an anxious member's request. On a daily basis, management is faced 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 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. In this course, participants review credit union data-retention issues, from the teller line to the back office.

### 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:

- Explain regulatory guidelines on data retention

- 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

### Topics

This course covers the following topics:

- 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

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## 11.04 CU\*Spy Online Reports and Statement Retrieval



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1 hour

By Request

Imaging Solutions

### 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

This course covers the following topics:

- 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



## SettleMINT EFT

Taught by the SettleMINT EFT team, courses in this category were designed for member service and accounting staff, as well as those who work with electronic funds transfers. Course topics include ATM/debit card processing, online credit card processing, and online bill pay processing.

### Courses at a Glance

- 12.00 Standard ATM/Debit Card Platform
- 12.01 Online Credit Cards: Loan Creation and Card Embossing
- 12.02 Online Credit Cards: Daily Maintenance/Reports
- 12.03 Online Credit Cards: On the Front Line
- 12.04 **It's Me 247** Bill Pay Powered by Payveris: Product Overview and Daily Management
- 12.05 Online Credit Card Processing: Product Overview
- 12.06 Skip-a-Pay Program Implementation for Online Credit Cards
- 12.07 **It's Me 247** Bill Pay Powered by Fiserv: Product Overview and Daily Management
- 12.08 **It's Me 247** Bill Pay Powered by iPay: Product Overview and Daily Management
- 12.09 ATM Processing

Heather



Managed Services

**SettleMINT<sup>EFT</sup>**  
CU\*ANSWERS Management Services



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## 12.00 Standard ATM/Debit Card Platform

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1 hour

By Request

SettleMINT EFT

### 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 examines 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

This course covers the following topics:

- 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





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## 12.01 Online Credit Cards: Loan Creation and Card Embossing

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45 minutes

Scheduled

SettleMINT EFT

### Summary

In this course, participants 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

- Define risk-based pricing
- Identify options for modifying a credit card loan
- List online credit card products
- List steps involved in card embossing

### Topics

This course covers the following topics:

- 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



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## 12.02 Online Credit Cards: Daily Maintenance/Reports

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1 hour

Scheduled

SettleMINT EFT

### Summary

This course introduces participants to daily and monthly reports they should be reviewing. Participants 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 daily
- Explain procedures involved in account maintenance and restricted-card maintenance

- Make card updates
- Explain procedures involved in rate maintenance and payment changes
- Perform card orders

### Topics

This course covers the following topics:

- Reports requiring daily review
- Reports requiring monthly review
- Adding additional signers
- Choosing the correct credit card product
- Rate maintenance
- Block code maintenance
- Restricted card maintenance
- Update/order cards
- Payment change
- Fixed payments



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## 12.03 Online Credit Cards: On the Front Line

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1 hour

Scheduled

SettleMINT EFT

### Summary

In this course, participants learn how to find details about credit card accounts through Phone Operator and Account Inquiry. Participants also learn about making payments and cash advances. Additionally, participants 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 adjust 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

This course covers the following topics:

- 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

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## 12.04 **It's Me 247** Bill Pay Powered by Payveris: Product Overview and Daily Management

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1 hour

By Request

SettleMINT EFT

### Summary

This course introduces participants to the CU\*Answers bill payment and bill presentment offering, **It's Me 247** Bill Pay, with transaction processing powered by Payveris. This course also covers 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
- Perform daily report monitoring

- Explain bill pay features, including bill presentment, recurring payments, and inquiry features
- Identify methods for setting up a biller

### Topics

This course covers the following topics as they relate to **It's Me 247** Bill Pay:

- 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

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## 12.05 Online Credit Card Processing: Product Overview

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1.5 hours

By Request

SettleMINT EFT

### Summary

In this course, participants learn about the CU\*BASE online credit card system and how to convert their credit card portfolio to an online solution. Participants 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

This course covers the following topics:

- 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

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## 12.06 Skip-a-Pay Program Implementation for Online Credit Cards

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1 hour

By Request

SettleMINT EFT

### Summary

This course introduces participants to the Skip-a-Pay program, a CU\*BASE feature designed for credit unions that offer members online credit cards. During this course, participants learn how to set up an automated program as well as how to 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 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

This course covers the following topics:

- 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

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## 12.07 **It's Me 247** Bill Pay Powered by Fiserv: Product Overview and Daily Management

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1 hour

By Request

SettleMINT EFT

### Summary

This course introduces participants to the single sign-on bill payment and bill presentment offering, **It's Me 247** Bill Pay powered by Fiserv. Among topics reviewed are 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

This course covers the following topics:

- 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

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## 12.08 **It's Me 247** Bill Pay Powered by iPay: Product Overview and Daily Management

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1 hour

By Request

SettleMINT EFT

### Summary

This course introduces participants to the single sign-on bill payment and bill presentment offering, **It's Me 247** Bill Pay powered by iPay. Among topics reviewed are 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

This course covers the following topics:

- 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



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## 12.09 ATM Processing

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1.5 hours

By Request

Accounting/Back Office

### 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

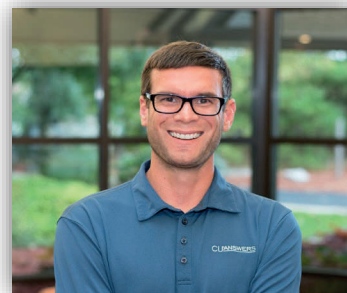
This course covers the following topics:

- 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

## Internet Retailer Support Center

Taught by the Internet Retailer Support Center (IRSC) team, 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 IRSC online store.

Kristian



IRSC

### Courses at a Glance

- 13.00 Customizing Your Online Experience: **It's Me 247** Online, Mobile, and Text Banking 📱
- 13.01 Shopping the IRSC Online Store 📱
- 13.02 MAP/MOP – Applying for Membership Online
- 13.03 Launching Your FREE CU\*Answers Mobile App
- 13.04 Deploying Your Mobile Experience Center (MXC) 📱
- 13.05 Launching Secure Online Form Generator/Request Center
- 13.06 **It's Me 247** Online Banking 📱
- 13.07 Providing Added Security in Online Banking with the Personal Internet Branch 📱



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## 13.00 Customizing Your Online Experience: **It's Me 247** Online, Mobile, and Text Banking



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1 hour

By Request

IRSC

### Summary

This course introduces participants to member self-service financial products, which continue to dominate the development of technology due to their convenience. In this course, participants learn about the customizable features for 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

This course covers the following topics:

- **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

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## 13.01 Shopping the IRSC Online Store

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1 hour

By Request

IRSC

### Summary

This course shows participants how the Internet Retailer Support Center (IRSC) can help their credit union become an Internet retailer. In this course, participants learn about options available in the IRSC online store, see what other credit unions have purchased, and discover how to customize their 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 IRSC products and services can be customized

- 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

### Topics

This course covers the following topics:

- Featured IRSC products
- Shopping the IRSC online store
- Products and services that other credit unions have purchased
- FAQs
- IRSC contact information

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## 13.02 MAP/MOP – Applying for Membership Online

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1 hour

Scheduled

IRSC

### Summary

In this course, participants 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

This course covers the following topics:

- The difference between MAP and MOP
- Launching a MAP/MOP site
- MAP/MOP customizable features
- Future MAP/MOP enhancements

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## 13.03 Launching Your FREE CU\*Answers Mobile App

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1 hour

Scheduled

IRSC

### Summary

Designed for credit unions that would like to create a presence across all channels, this course shows participants how to deploy a mobile app to both Apple and Android app stores. In this course, participants learn how to deploy an app that has all 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:

- List customizable features of the CU\*Answers mobile app

- Identify the steps involved in launching the CU\*Answers mobile app
- List enhancements in the pipeline for the CU\*Answers mobile app

### Topics

This course covers the following topics:

- 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

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## 13.04 Deploying Your Mobile Experience Center (MXC)



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30 minutes

By Request

IRSC

### Summary

This course shows participants how to deploy their credit union app store, the Mobile Experience Center (MXC). In this course, participants learn how to use the MXC to showcase their credit union mobile app offerings and other recommended apps in online banking and on their credit union website. Additionally, participants learn how to 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

This course covers the following topics:

- Apps that can be included in the MXC
- How other credit unions are using the MXC
- The process of deploying the MXC

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## 13.05 Launching Secure Online Form Generator/ Request Center

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1 hour

Scheduled

IRSC

### Summary

This course shows participants how to launch Secure Online Form Generator/Request Center, a web-based solution that allows credit unions to design their own online forms and applications by which members can make requests in online and mobile banking. From the basics of creating a secure online form to the ins and outs of working the data submitted. Topics in this course give participants the tools they need to get started using Secure Online Form Generator/Request Center.

### Audience

This course is designed for all credit union personnel.

### Objectives

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

- Describe the process of creating custom online forms

- List data that can be captured using custom online forms
- Explain where the forms can be embedded in online and mobile banking
- Describe how credit union staff can work data submitted via a custom online form

### Topics

This course covers the following topics:

- Working with CU\*Answers to create custom online forms
- Data that can be captured with custom online forms
- Where custom online forms can be embedded in online and mobile banking
- Working custom online forms



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## 13.06 It's Me 247 Online Banking

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1.5 hours

By Request

IRSC

### Summary

This course covers 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 members
- Use online banking as a delivery channel for credit union services
- List online banking configuration options
- Set up Internet member services
- List CU\*Answers mobile web and mobile text products

### Topics

This course covers the following topics:

- 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 assists participants in configuring online banking services. For this workshop, participants need access to:

- Member Service Tools
- Configuration Functions
- Lending/Loan Account Tools
- Active Beta Development
- Management Forecasting Tools & Reports
- Misc. Back Office Tools

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## 13.07 Providing Added Security in Online Banking with the Personal Internet Branch

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1.5 hours

By Request

IRSC

### 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

This course covers the following topics:

- 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

## Organizational Resource Development (ORD)

Taught by the Organizational Resource Development (ORD) team, courses in the category are geared toward all credit union staff and cover topics related to human resources and helping staff reach their full potential. Course topics include customer service best practices, interviewing skills, and leadership basics.

### Courses at a Glance

- 15.01 Providing First-Class Customer Service to Members
- 15.02 Interviewing Skills with a Credit Union Slant
- 15.03 Leadership Essentials for New Supervisors
- 15.04 The Art of Coaching
- 15.05 Conflict Resolution in the Workplace

Amber



ORD

Organizational Resource Development  
*Building Teams*



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## 15.01 Providing First-Class Customer Service to Members

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1 hour

Scheduled

ORD

### 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 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

This course covers the following topics:

- 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



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## 15.02 Interviewing Skills with a Credit Union Slant

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1 hour

Scheduled

ORD

### 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:

- Ask appropriate follow-up questions during interviews
- List interviewing techniques that help in selecting qualified candidates
- Identify which questions are best and which ones are to be avoided during interviews

### Topics

This course covers the following topics:

- Interview etiquette
- Different interview styles
- Interview tricks of the trade
- Questions and subjects to avoid

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## 15.03 Leadership Essentials for New Supervisors

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1 hour

Scheduled

ORD

### 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 shows 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:

- List daily supervisory responsibilities

- Identify skills required for a successful transition into a leadership role
- List effective methods of communicating, setting goals, and providing feedback

### Topics

This course covers the following topics:

- 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



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## 15.04 The Art of Coaching

---

1 hour

Scheduled

ORD

### 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 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

This course covers the following topics:

- 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 team unity



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## 15.05 Conflict Resolution in the Workplace

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1 hour

Scheduled

ORD

### Summary

This class covers the many different reasons for workplace conflict, how to identify the triggers, and the best methods and styles for positive resolution.

### Audience

This course is designed for any credit union employee, but especially those in a leadership or supervisory role who may need to act as a mediator.

### Objectives

By the completion of this course, participants will have a better understanding of:

- The different types of workplace conflicts
- How disagreement can result in a positive force for a team

- Different types of conflict resolution based on personality
- The process of resolution
- The responsibility of acting as a conflict mediator

### Topics Covered

This course covers the following topics:

- How conflict affects a team
- Good vs. bad conflict
- Seven conflict “triggers” in the workplace
- Using the Thomas-Kilmann Conflict Mode Instrument (TKI) to determine conflict resolution style
- The important role of acting as a mediator



## Asterisk Intelligence








Taught by the Asterisk Intelligence team, 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 also learn the ins and outs of CU\*Answers Analytics Booth online data-analytics tools. Some of these courses are taught during Asterisk Intelligence Week. See page 19 for details.

*Annalyn*



*Asterisk Intelligence*

### Courses at a Glance

- 16.00 Data Warehouse Tools & Strategies 
- 16.01 Educating Your Board with Data 
- 16.02 Introduction to Analytics Booth 
- 16.03 Expanding the Audience on Data with Analytics Booth 
- 16.04 Report Builder (Query) 1: Working with Computer-Stored Data for Reports & Inquiries
- 16.05 Report Builder (Query) 2: Building Custom Reports
- 16.06 Report Builder (Query) 3: Database Files & String Reports
- 16.07 iSeries File Transfers: Moving Data from CU\*BASE to Your PC 
- 16.08 Microsoft Excel for Credit Unions
- 16.09 Data Mining: "Know Your Member" Analysis Tools 
- 16.10 CU\*BASE Management Tools: Leadership Dashboards
- 16.11 Hot Topics in Database Management 
- 16.12 Getting Started with Unique Data Management (UDM)
- 16.13 Introduction to Visual Analytics Tools (VAT)



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## 16.00 Data Warehouse Tools & Strategies

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1 hour

By Request

Asterisk Intelligence

### Summary

This course introduces participants to the many different data warehouses that CU\*Answers offers. It shows participants how to gain optimal results through the careful use and management of these data warehouses. Additionally, participants 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

This course covers the following topics:

- CU\*Answers data warehouse locations
- CU\*Answers data warehouse timing
- CU\*Answers data warehouse access

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## 16.01 Educating Your Board with Data

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30 minutes

By Request

Asterisk Intelligence

### 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 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

This course covers the following topics:

- 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

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## 16.02 Introduction to Analytics Booth

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1.5 hours

By Request

Asterisk Intelligence

### Summary

This course introduces participants to the Analytics Booth software product, which keeps credit union staff, board members, and external stakeholders up to date on the latest data about their individual credit union. Participants learn about core features and how to access them.

Additionally, participants 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

This course covers 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

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## 16.03 Expanding the Audience on Data with Analytics Booth

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1 hour

By Request

Asterisk Intelligence

### Summary

In this course, participants discuss potential Analytics Booth audiences. Participants also consider advantages and disadvantages of providing access to their credit union board, auditors, executives, and staff. Additionally, the course covers 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:

- Set up temporary users

- List the benefits of adding new audiences
- Describe security features that limit content exposure
- Explain how to capture and store data

### Topics

This course covers the following topics as they relate to Analytics Booth:

- Expanded audiences
- User security and roles
- Temporary users
- Data capture and storage



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## 16.04 Report Builder (Query) 1: Working with Computer-Stored Data for Reports & Inquiries

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1.5 hours

Scheduled

Asterisk Intelligence

### Summary

This course introduces participants to the CU\*BASE Report Builder tool, also known as Query, a powerful, flexible tool for mining CU\*BASE member data. In this course, participants learn about database management, warehousing, and mining. This course covers pre-defined inquiry options found throughout CU\*BASE and outlines the steps to create a simple custom report.

### 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

This course covers the following topics:

- 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.



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## 16.05 Report Builder (Query) 2: Building Custom Reports

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1.5 hours

Scheduled

Asterisk Intelligence

### Summary

This course shows participants how the CU\*BASE Report Builder (Query) tool can give them the power to take control of one of their most valuable assets: data.

Participants learn about features that are commonly used with the CU\*BASE database structure. This course builds on the basics learned in course 16.05: Report Builder (Query) 1: Working with Computer-Stored Data for Reports & Inquiries.

### 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

This course covers the following topics:

- 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.



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## 16.06 Report Builder (Query) 3: Database Files & String Reports

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1.5 hours

Scheduled

Asterisk Intelligence

### Summary

Building on concepts covered in 16.04 Report Builder (Query) 1: Working with Computer-Stored Data for Reports & Inquiries and 16.05 Report Builder (Query) 2: Building Custom Reports, this course gives users a more in-depth look at the CU\*BASE Report Builder (Query) tool.

### Audience

This course is designed for those who are well versed in Report Builder (Query) 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

This course covers the following topics:

- 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



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## 16.07 iSeries File Transfers: Moving Data from CU\*BASE to Your PC

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30 minutes

By Request

Asterisk Intelligence

### Summary

Certain processes such as needing to move a favorite Query from CU\*BASE into Excel, getting an address file ready for an insurance provider, and downloading an AIRES file for an auditor in day-to-day credit union activity require the migration of data from the online CU\*BASE environment to individual workstations. In this course, participants learn the standards, minimum hardware requirements, and procedures to move files from CU\*BASE 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:

- List the various uses of file transfers

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

### Topics

This course covers the following topics:

- 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

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## 16.08 Microsoft Excel for Credit Unions

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1 hour

Scheduled

Asterisk Intelligence

### 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 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

This course covers the following topics:

- 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

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## 16.09 Data Mining: “Know Your Member” Analysis Tools

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1 hour

By Request

Asterisk Intelligence

### 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 show participants how to link products to member needs by using CU\*BASE marketing and member-analysis tools. Participants also learn 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

This course covers the following topics:

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

### On-Demand Equivalents

- 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



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## 16.10 CU\*BASE Management Tools: Leadership Dashboards

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1 hour

Scheduled

Asterisk Intelligence

### Summary

This course gives credit union leadership a practical look into how they can observe trends, track activities, review profitability, and audit key factors driving their business. Through investigation of multiple CU\*BASE tools, participants learn techniques to monitor member activity, understand the importance of internal controls, discover deficiencies they may have in their current practices, and maintain a satisfactory standard of operation.

### Audience

This course is designed for top-level management staff but can be helpful 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 track information and use it to increase profitability

### Topics

This course covers the following topics:

- 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
  - Configuration Functions
  - Collections Tools
  - General Ledger Inquiry & Posting Tools
  - Teller & Cash Analysis Tools
  - Lending/Loan Account Tools
  - Know Your Member Analysis Tools
  - Mgmt. Analysis Dashboards & Inquiries
  - Active Beta Development
  - Management Forecasting Tools & Reports
  - Marketing Processing & Analysis Tools
  - File Maintenance Tools & Monitoring



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## 16.11 Hot Topics in Database Management

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1 hour

By Request

Asterisk Intelligence

### Summary

This course highlights the latest database management tools and solutions that CU\*BASE has to offer.

### Audience

This course is designed for database managers, database administrators, or any other credit union staff member responsible for data.

### Objectives

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

- Access resources available to assist in creating a database management strategy
- Identify recently developed database management tools within CU\*BASE
- List best practices for CU\*BASE data retention

### Topics

Since this course is geared toward topics that are most relevant at the time, topics may include but are not limited to the following:

- Current database management toolset
- Procedures to begin using database management toolset
- Developing a database management strategy
- Database management best practices
- Data governance standards
- Data warehousing
- Custom data floods
- Data purges and archival programs
- Custom fields (Unique Data Management)
- Data Exchange (DEX) automated data extraction
- SnapShot library and data time slices



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## 16.12 Getting Started with Unique Data Management (UDM)

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1 hour

Scheduled

Asterisk Intelligence

### Summary

This course introduces participants to Unique Data Management (UDM) custom fields, a design-your-own database solution that enables the creation of customized data points to collect and store in CU\*BASE. Participants learn strategies for working with UDM tools in CU\*BASE.

### Audience

This course is designed for database managers, database administrators, and any other credit union staff member responsible for data.

### Objectives

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

- List best practices for configuring and managing custom fields
- Identify the toolset needed to manage a set of custom fields

- View custom fields and their entries
- Update custom fields and their entries
- Generate custom field reports

### Topics

This course covers the following topics:

- Configuring custom fields
- Differences between membership-level and account-level custom fields
- Data entry tools that can be used with custom fields
- Reviewing custom field entries
- Database tables that store custom field entries
- Best practices for maintaining custom fields and their entries

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## 16.13 Introduction to Visual Analytics Tools (VAT)

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1 hour

Scheduled

Asterisk Intelligence

### Summary

This course familiarizes participants with CU\*BASE visual analytics tools found mainly in CU\*BASE dashboards. Participants learn how to use these tools to present member data in a way that is both clear and compelling.

### Audience

This course is designed for data analysts and data-curious people in any role at the credit union.

### Objectives

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

- Locate visual analytics tools within CU\*BASE
- Describe the role visual analytics tools play in a data-analytics strategy
- Extract and share CU\*BASE data using visual analytics tools

- Edit graphs and charts using visual analytics tools
- Explain the purpose of each aspect of a visualization (graph type, color coding, etc.)
- Explain how the characteristics of a data set dictate the visualization style
- Explain the value of presenting data using CU\*BASE visual analytics tools

### Topics

This course covers the following topics:

- Accessing visual analytics tools within CU\*BASE
- Understanding how the type of data set dictates the type of visualization used
- Extracting and sharing visualizations
- Expanding the audience of data presented using visual analytics tools

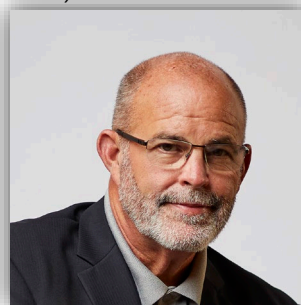
## CEO School

Designed with CEOs in mind, courses in this category show participants how to best use CU\*BASE data-mining and visual-analytics tools to gain fresh insights about their membership and their credit union. Courses also show participants how to master CU\*BASE data-mining tools and use the Internet to increase brand awareness and product usage among members. Course topics include the CU\*Answers Business Intelligence Help Desk, the CU\*BASE software development life cycle (SDLC), retail strategies, Unique Data Management (UDM), CU\*BASE visual analytics tools (VAT), and Analytics Booth.

Courses in this category are held exclusively during CEO School.

See page 19 for details.

Randy



CEO



### Courses at a Glance

- 17.00 Introduction to Asterisk Intelligence and the CU\*Answers Business Intelligence Help Desk
- 17.01 Building Trust with Cooperative Owners: CUSOs and CUs
- 17.02 Understanding the CU\*Answers SDLC and Promoting Projects
- 17.03 Adopting and Highlighting a Retail Strategy as a Senior Executive
- 17.04 Evolving Retail Strategies Tactically: Facing the Inevitable Internet Influence
- 17.05 Building a Firm with Digital Intelligence and Proving It to the Marketplace
- 17.06 Action Through Consumer-Owners: Developing Delivery Channels That Face Both Personas
- 17.07 Reporting Up and Delegating Down: Building Trust with Your Team and Your Board
- 17.10 CU\*BASE Management Tools for CEOs: Leadership Dashboards and Visual Analytics Tools (VAT)
- 17.11 Data Warehouse Strategies for CEOs: Do They Fit with Your Future Plans?
- 17.12 Educating Your Board with Data
- 17.13 Expanding Your Audience for Data: Analytics Booth as the Foundation
- 17.14 Database Management: Tool Spotlight for CEOs
- 17.15 Getting Started with Unique Data Management (UDM) for CEOs





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## 17.00 Introduction to Asterisk Intelligence & the CU\*Answers Business Intelligence Help Desk

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2 hours

Date and time to be announced

CEO School

### Summary

In this course, participants will meet the Asterisk Intelligence team and discuss their goals for coming years. Participants will have the chance to connect with Asterisk Intelligence team members directly, review their team resources, and consider the solutions and tools they've built so far and what they'll build in the future.

### Audience

Credit union CEOs: This class is designed for credit union and CUSO executives/business designers who are challenged with how to respond to the data-analytics wave going through all industries today.

### Objectives

By the completion of this course, participants will have:

- Discussed why CU\*Answers started a business intelligence team, help desk, and new business line

- Explored how credit unions might adapt their business and team models to participate in today's data craze
- Examined strategies available to credit unions so that credit union executives, team members, and even volunteers can enhance their roles through data techniques
- Reviewed Asterisk Intelligence education and marketing initiatives that credit unions might engage going forward

### Topics

This course covers the following topics:

- Introduction to Asterisk Intelligence (AI)
- Meet the team
- Business initiatives
- Education opportunities
- AI as a CUSO business intelligence unit



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## 17.01 Building Trust with Cooperative Owners: CUSOs and CUs

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1.5 hours

Date and time to be announced

CEO School

### Summary

This course offers an interactive conversation with business designers about the special considerations in designing, leading, and being successful with participants in a cooperative business format.

### Audience

Credit Union CEOs: This class is designed for credit union and CUSO executives/business designers with the intent to drive up the cooperative-ownership value quotient with their cooperative's owner base.

### Objectives

By the completion of this course, participants will have:

- Discussed cooperative business design and the idea of building a business with consumers as active owners in an organization
- Examined the group's ideas on how that differs from other business types and approaches
- Considered the activities of any business organization and how they are split between interacting with the consumers of their products/services and interacting with the ownership community engaged officially and unofficially with the organization

- Contrasted the difference between cooperatives and credit unions in general and considered this question: "What factors make credit unions unique as cooperatives?"
- Discussed what it means for a credit union to own a CUSO that is also a cooperative and considered this question: "How do organizations differ from individual consumers when owning a cooperative?"
- Explored how these ideas can help credit unions and [cuasterisk.com](http://cuasterisk.com) CUSOs more effectively going forward

### Topics

This course covers the following topics:

- Building businesses with the cooperative business design
- Consumers vs. owners in the cooperative business design
- Cooperatives vs. credit unions
- Owning a CUSO as an organization vs. as an individual



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## 17.02 Understanding the CU\*Answers SDLC and Promoting Projects

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1 hour

Date and time to be announced

CEO School

### Summary

This course offers a presentation of the software development life cycle (SDLC) policy and procedure used by CU\*Answers in developing solutions for credit unions. Participants learn how to get more out of the solutions credit unions want, need, and request from our CUSO. Knowing how the sausage is made is the first step in adding your value to the process and getting more from your CU\*Answers relationship.

### Audience

Credit union CEOs: This class is designed for credit union and CUSO executives/business designers who have the intent to maximize their relationship with our network's solution developers and drive more value into our community's toolkits.

### Objectives

By the completion of this course, participants will have:

- Examined the CU\*Answers SDLC as a policy and as a process for developing software

- Reviewed how CUSO participants can participate in the development of projects and solutions
- Debated how the SDLC guarantees a credit union the influence it needs as a participant in the CU\*BASE user community
- Met the Product Team leaders who drive the day-to-day SDLC processes and discussed ways to work together more closely

### Topics

This course covers the following topics:

- The software development life cycle (SDLC)
- Product Team resources and the "factory floor"
- Tactics for credit unions to participate with the Product Team
- Owner's Voice
- Owner's View



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## 17.03 Adopting and Highlighting a Retail Strategy as a Senior Executive

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1 hour

Date and time to be announced

CEO School

### Summary

This course will offer participants an interactive conversation with business designers on how to contrast their retail strategies with those of their competition and even their peers.

### Audience

Credit union CEOs: This class is designed for credit union and CUSO executives/business designers looking to up their game by identifying and innovating on their retail approaches in today's and tomorrow's credit union marketplace.

### Objectives

By the completion of this course, participants will have:

- Considered the difference between service cultures and retail cultures and which fits today's credit union challenges the best
- Examined the culture of each participant's credit union and how they define themselves

- Reviewed the future of credit unions and how retailing is changing for the credit union marketplace
- Debated the best way to communicate to staff, board members, and third parties today's emphasis on retailing as a core competency for credit unions

### Topics

This course covers the following topics:

- The definition of retailing
- Retailing as a core competency for credit unions
- Selling a retail culture to credit union owners and consumers
- Today's top retailing trends outside the credit union industry that might need to become credit union competencies



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## 17.04 Evolving Retail Strategies Tactically: Facing the Inevitable Internet Influence

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2 hours

Date and time to be announced

CEO School

### Summary

In this class, participants will dive into traditional credit union service channels and discuss the Internet-retailing effect that shows up based on today's member interactions. Participants will hear from credit union executives on how they have evolved their response to the Internet shopper in their operations and what their plans are for the future.

### Audience

Credit union CEOs: This class is designed for credit union and CUSO executives/business designers who are challenged to evolve with their members' changing consumer views on how every retail channel/outlet should work now that Amazon has changed consumer expectations on best practices for retailing.

### Objectives

By the completion of this course, participants will have:

- Reviewed the top six member delivery channels and their status going forward
- Debated how the things members are learning in other retailing approaches are influencing what's needed in credit union channels

- Explored the business plans and pace of change for each participant's credit union
- Examined each participant's predictions of about the future and considered these questions: "What are we ready for? What is still not clear? Where should we go to learn?"
- Discussed how to have a collaborative investment plan and raise capital to meet the future cost of innovation

### Topics

This course covers the following topics:

- The future of member delivery channels
- Teller/lobby
- Online and mobile banking
- Call centers
- Indirect outlets
- Third-party networks
- Member service automation tools
- CU\*Answers plans and resources for evolving retail strategies

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## 17.05 Building a Firm with Digital Intelligence and Proving It to the Marketplace

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1.5 hours

Date and time to be announced

CEO School

### Summary

In this course, participants will have an interactive conversation about how firms secure their intellectual assets in today's business world and how it might not be as easy as it is intuitive for businesses to move from what their people know to what the organization secures as knowledge assets. From there, the conversation will shift to how participants can prove to the marketplace, their consumers, and their owners that their firm has digital assets.

### Audience

Credit union CEOs: This class is designed for credit union and CUSO executives/business designers who are challenged with the tasks of securing the credit union or CUSO knowledge assets for their organization's future and proving it to stakeholders.

### Objectives

By the completion of this course, participants will have:

- Discussed how the participants categorize credit union intellectual assets in today's world
- Explored the challenges related to moving from past approaches for securing intellectual assets vs. what is expected in today's Internet and digital models
- Explored the difference between how internal team members and third-party commentators see a credit union's body of work and the assets that need to be secured for the future

### Topics

This course covers the following topics:

- What customers need digitally to understand a credit union organization
- What examiners expect from credit unions via digital presentation
- Where credit union team members go when they're looking for what the credit union knows (about anything)
- The thought that keeps CEOs up at night: "If we only knew what we know"



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## 17.06 Action Through Consumer-Owners: Developing Delivery Channels That Face Both Personas

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1.5 hours

Date and time to be announced

CEO School

### Summary

This course offers a working session where CUSO and credit union leaders discuss a new CU\*Answers collaborative initiative with all business leaders interested in driving value to cooperative participants through cooperative business design.

### Audience

Credit union CEOs: This class is designed for credit union and CUSO executives/business designers who might be interested in starting a movement to lift the credit union industry through a vision to encourage entrepreneurs to see cooperative business designs and practices as one of the best ways to start, foster, and drive a business.

### Objectives

By the completion of this course, participants will have:

- Examined the state of startups in the credit union industry and how a positive reputation for cooperative design might inspire more

- Discussed ways to highlight the cooperative business design for entrepreneurs who might be looking to choose a format for their next initiative
- Considered how the cuasterisk.com network could build a voice to influence business leaders to use a cooperative format more effectively in the future
- Debated whether CUSOs and credit unions could be positively affected by talking about cooperatives without ever mentioning the credit union space

### Topic

This course covers the following topic:

- The business plan for action through consumer-owners



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## 17.07 Reporting Up and Delegating Down: Building Trust with Your Team and Your Board

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1 hour

Date and time to be announced

CEO School

### Summary

This course offers a working session for business leaders, managers, and supervisors to hone their skills at building teams and getting things done. Everyone is reporting to someone and delegating to others and not just when it's a formal organizational-chart thing. In this session, participants will spend time brainstorming on how to move the ball, improve performance, and earn more from their activities as leaders.

### Audience

Credit union CEOs: This class is designed for credit union and CUSO executives/business designers with the intent to execute at higher levels, and get more out of teamwork with staff, peers, and their credit union/CUSO boards.

### Objectives

By the completion of this course, participants will have:

- Explored the 8:1:1 ratio for delegation and these questions: "Does it make sense? What's the best way for a leader to track the effectiveness of delegation?"

- Explored the 6:2:2 ratio for reporting up when responsible for carrying out the task being delegated
- Explored this question: "How do the people who work with you know they're your people, that you trust them, you count on them, and that they are getting a chance to lead through your delegation?"
- Explored how leaders build positive track records with the people to whom they report and considered this question: "Do those reports build trust that you get things done, that you do what you say you're going to do, and that you're leading, not being told what to do?"

### Topics

This course covers the following topics:

- Winning with your direct reports
- Winning with your board
- Winning with your shareholders
- Winning with the marketplace





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## 17.10 CU\*BASE Management Tools for CEOs: Leadership Dashboards & Visual Analytics Tools (VAT)

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1 hour

Date and time to be announced

CEO School

### Summary

It all started with CU\*BASE dashboards and the idea that everyday tasks could be improved with analysis, trending, and database demographic techniques to the get the work done in CU\*BASE.

Today there are more than 100 dashboards in the CU\*BASE analytics toolkit. During this session, participants will discuss what is next, new visual tools to enhance their presentations, and how new PHP web modules and presentation will up their game in the future. Almost every role at the credit union can be enhanced when using one of these dashboards.

### Audience

Credit union CEOs: This class is designed for credit union and CUSO executives/business designers investigating how to use data as a currency and foundation for building trust, engaging contributors, and finding the spark that might be missing in their staff's day-to-day tasks.

### Objectives

By the completion of this course, participants will have:

- Listed the tools that collectively form the suite of leadership dashboards
- Set goals based on results found by reviewing CU\*BASE dashboards
- Identified methods used in analyzing dashboard data

- Explored how to use dashboard data to improve credit union operations
- Discussed how to create a plan to periodically track information and use it to increase profitability
- Explored the role of graphics in a data analytics strategy
- Examined the value of presenting analytics with CU\*BASE visual analytics tools

### Topics

This course covers the following topics:

- Key CU\*BASE management analysis tools
- Member spending trends
- Internal controls
- Benchmarking activity
- Understanding member activity
- Understanding member preferences
- Understanding your membership
- Auditing and mining activity
- Visual analytics tools (VAT)
- Where to find them
- The best chart types for different data sets
- Extracting and sharing VAT graphics
- Strategies for expanding an audience for data with VAT

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## 17.11 Data Warehouse Strategies for CEOs: Do They Fit with Your Future Plans?

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1 hour

Date and time to be announced

CEO School

### Summary

In this course, participants will look at the value of data warehouses and how to make a return in driving one into a credit union's business plan and operations. Participants will also look at the evolving business offering via the cuasterisk.com network and CU\*Answers specifically.

The CU\*Answers Asterisk Intelligence team is the key architect in creating value propositions for these solutions, new tools that automate the movement of data between storage warehouses, and the processing concepts that drive the value out of the stored data.

Data warehouses are very likely in every credit union's future in one form or another. This class will help participants negotiate the "why."

### Audience

Credit union CEOs: This class is designed for credit union and CUSO executives/business designers investigating the future of data-warehouse capabilities in the cuasterisk.com network and the general marketplace strategies that will influence every credit union's future.

### Objectives

By the completion of this course, participants will have:

- Discussed how the current vendor community is marketing a credit union's need for data warehousing and whether the group agrees with the value propositions

- Reviewed available CU\*Answers data warehouses and examined how to access data in each one, and why
- Explored how CU\*Answers and the Asterisk Intelligence team plan to build an audience for both shared and private data warehouses in the future

### Topics

This course covers the following topics:

- CU\*Answers data-warehouse strategies and support models
- Supporting external data warehouses
- Supporting internal data warehouses
- Pricing strategies for both
- Transferring data between warehouses
- Developing solutions directly for warehouses
- Phone optics and **It's Me 247** optics
- Securing third-party data for data warehouses

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## 17.12 Using Data to Turn Your Board into Collaborative Analysts

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30 minutes

Date and time to be announced

CEO School

### Summary

Can you create a curious culture in your boardroom? Why not create a space where board members can go beyond the boardroom and work wherever and whenever the mood strikes them? Why not give them the power of knowing the numbers, the stats, and the trends to build trust, a sense of ownership, and the pride of knowledge that comes from being an active owner?

Analytics Booth is the platform and the engine that can deliver on the concepts, but it takes you to kick off a program that will bring everyday modern techniques and capabilities to your boardroom and potentially bored board members.

This course also covers whether using data and self-initiated tools with your board members could shake things up a bit at your credit union. Are you ready for an engaged board? Are you the reason they are engaged? Come talk about it with your peers.

### Audience

Credit union CEOs: This course is designed for credit union and CUSO executives/business designers investigating how to use data as a currency and foundation for building trust, engaging contributors, and finding the spark that might be missing in their boardroom interactions.

### Objectives

By the completion of this course, participants will have:

- Discussed the pros and cons of activating a credit union board as collaborative analysts and considered this question: “Is it worth the CEO’s time and effort?”
- Explored opportunities available to board members through the effective review and use of data
- Discussed developing an action plan for coaching board members on how to effectively review data
- Explored how to educate credit union employees on how to organize data in a way that can easily be digested by board members

### Topics

This course covers the following topics:

- Using Analytics Booth as a senior team tool
- Building a job description for board members using Analytics Booth
- Managing an Analytics Booth board member user community
- Celebrating wins and losses with your board via data



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## 17.13 Expanding Your Audience for Data: Analytics Booth as the Foundation

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1.5 hours

Date and time to be announced

CEO School

### Summary

The best way to earn from data as a business designer is to share it with as many analysts as possible, activate an audience of collaborators, and help them help you! Analytics Booth is designed for that value proposition.

At unprecedented speed (24-hour feedback loops), Analytics Booth generates trendlines, stores those trends, generates alerts to generate interest and return visits for users, and allows you to work and trust a growing crowd of credit union stakeholders.

Analytics Booth is the most cost-effective way to show your grasp of today's business fascination with data and up your game as being in the know. In this course, we will review the capabilities of Analytics Booth and put you in the credit union designer's chair as a credit union executive in the know.

### Audience

Credit union CEOs: This class is designed for credit union and CUSO executives/business designers who are ready to dive into the capabilities of Analytics Booth as one of the foundations of any aggressive credit union's business intelligence program: growing an audience of contributing analysts and stakeholders.

### Objectives

By the completion of this course, participants will have:

- Explored core features of the Analytics Booth online analysis tool
- Discussed benefits and limitations of the Analytics Booth toolkit
- Examined how to apply data filters and format data for more effective analysis
- Reviewed the source of the data used by Analytics Booth tools
- Discussed the benefits of adding new audiences to access Analytics Booth data
- Examined Analytics Booth security features that limit content exposure

### Topics

This course covers the following topics as they relate to Analytics Booth:

- Features and alerts
- Filtering, graphing, and exporting data
- Table layouts and display settings
- Expanded audiences
- User security and roles
- Temporary users
- Data capture and storage



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## 17.14 Database Management: Tool Spotlight for CEOs

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1 hour

Date and time to be announced

CEO School

### Summary

Every credit union today that counts on a vendor's technical solution needs to rely on their ability to understand, utilize, and drive good database techniques in order to up their game and their vendor's game.

Database management will help you get more from CU\*BASE as a toolkit and from all CU\*Answers solutions as owners and product-development contributors. In this course, we will review key tactics and the CU\*BASE database toolkits that fuel your return on core processing and ancillary solutions.

From there, we hope you will think about how your database-management resources work in your organization. If you have yet to call out these skills as a credit union talent, then this course may help you get on your way.

### Audience

Credit union CEOs: This class is designed for credit union and CUSO executives/business designers investigating how improving their skills related to database management can improve their returns as CUSO clients, investors, and collaborators.

### Objectives

By the completion of this course, participants will have:

- Discussed the growing need for credit unions to develop good data

governance and strategies for evolving database management alongside changing member habits and operational goals.

- Explored the best way to create data champions and process managers to ensure their data is current and that the way they use it is effective
- Investigated the strength of CU\*BASE data structures and the tools needed to be effective as data administrators and analysts

### Topics

This course covers the following topics:

- Strategies for developing a plan and structure for database management
- Best practices for managing data
- Data governance standards in CU\*BASE
- Current tools and how to start using them
- Data warehousing
- Custom data floods
- Data purges and archival programs
- Custom fields (Unique Data Management)
- DEX (Data Exchange) automated data extraction
- The SnapShot library and data time slices



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## 17.15 Getting Started with Unique Data Management (UDM) for CEOs

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1 hour

Date and time to be announced

CEO School

### Summary

Unique Data Management (UDM) is the direct result of a Data Boot Camp attendee and credit union pushing for the ability of the credit union to create, gather, and analyze data for action. It started out as “give us some custom fields” and ended up being “give us the tools to create for our future data without limits.”

If that sounds like something you should check out, then sign up for this class and learn more. We will investigate the current capabilities of UDM and where we think it will go as the CU\*BASE community embraces the power of being the architects of data solutions.

It takes vision to create technical solutions that your team will run with. Come learn how to put your vision to work.

In the course 17.14 Database Management: Tool Spotlight for CEOs, we discussed the concepts for data management and the potential stress when you go live. This course will test those concepts.

### Audience

Credit union CEOs: This class is designed for credit union and CUSO executives/business designers investigating how to move beyond just using data solutions to actually building data and collection methods to enhance them.

### Objectives

By the completion of this course, participants will have:

- Discussed how to organize their leadership team to take advantage of UDM tools
- Explored the data governance and process rules for how UDM is used and the data designed
- Explored the toolset necessary for managing a set of UDM custom fields and reviewed how credit union staff will be able to view and update UDM data
- Explored reports and analysis on UDM custom data

### Topics

This course covers the following topics:

- Best practices for UDM data structure
- Tools for managing, viewing, and reporting on UDM data
- Incorporating UDM data into your data analysis strategies
- Understanding how to collect data and populate your UDM database
- What is the future for UDM?
- Self-directed floods, batch collection/population of data
- UDM fields attached to other CU\*BASE tables