CU*ANSWERS UNIVERSITY

2023 EDUCATION CATALOG

CU*ANSWERS Client Services & Education

A Note from the VP of Education

Laura

Client Services & Education

Dear Clients,

This year we've been working hard at developing and delivering online learning content. We currently have over 570 recorded courses in our OnDemand site which you will find on cuanswers.com, with over 50 channels to choose from! One of the newest additions is the **Continuing Education Channel**. This is a grouping of all classes that many new clients request during their first six months of being on CU*BASE. But it's not just for new clients! The content is great as a refresher or for a team member taking on a new position who needs to further their education.

Additionally, I would like to spotlight our Show Me the Steps help library! This has been a hit with many of our clients, boasting over 580 topics. There are many access points to Show Me the Steps, including the Network Links button in CU*BASE. You'll also find links embedded in our Online Help, and you can access the Show Me the Steps help system on our website at cuanswers.com, under the Resources menu.

Classroom and webinar training have also been a hit with our clients. In this catalog you will find many events both in person and via webinar. We have added a new course under the Secure-U section: course 9.60 *Unpacking the CU*Answers High-Availability (HA) Rollover Exercise*. This course is being offered four times in 2023. Course 16.12 *Getting Started with Unique Data Management (UDM)* has even more classes this year due to client interest.

Finally, we have two very popular courses that I would like to highlight: *Member Service Training Day* and *Teller Training Day*. One of these courses is offered every month, so each one is scheduled six times a year! They have been very popular for our clients hiring new tellers or member service representatives, or even just as a refresher for current staff.

Learn about these training offerings and more in the 2023 Education Catalog. Brought to you by the CU*Answers Client Services and Education Team.

Sincerely,

Laura S. Welch-Vilker

CU*ANSWERS
Client Services & Education

Laura S Welch-Vilker

Vice President of Client Services and Education

Table of Contents

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.

Registration Procedures

- **Classroom Training** – Visit *open.cuanswers.com/classroom* to register for classroom sessions listed in this catalog. Please note registration closes two days prior to a course's start date. After registering, you will receive a confirmation email. View details about classroom training on *page 7.*
- **Webinars** – Visit *open.cuanswers.com/webinars* to register for webinars listed in this catalog. Please note registration closes two days prior to a course's 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* 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 15.*
- **Other Events Throughout the Year** – Watch for additions to this calendar all year long! You will receive an email invitation with registration instructions, which will be sent to everyone on the CU*Answers Client News email distribution list. Contact the CU*Answers Writing Team at *clientnews@cuanswers.com* to be added to this list.

Training Offered by Request

In addition to offering scheduled training, CU*Answers offers training by request. To request this type of training, contact the CU*Answers Client Services & Education Team at *education@cuanswers.com*. Please include the desired training date, number of staff members attending, and desired format (virtual or in-person). They will try their best to accommodate your preferences while honoring existing training commitments.

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 the registration site are in **Eastern Time**). Webinars are scheduled generally after 11 AM ET to accommodate clients in Central, Mountain, Pacific, and Hawaiian Time Zones.

Cost

Except as noted elsewhere in this catalog, all CU*Answers training, including webinars, are free of charge. To request a quote for customized training, contact the CU*Answers Client Services & Education Team at *education@cuanswers.com*.

Cancelations/Substitutions

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

Training Offerings

In-Person Training

Classroom Training

Held at the CU*Answers University main training site in Grand Rapids, Michigan, classroom training sessions not only educate participants about 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 25* and look for "Classroom" in the Format column.

Customized On-Site Training

There are times when clients need training tailored to meet their credit unions' unique needs, policies, and processes. When this is true, we encourage on-site training based on a time frame that best fits clients' schedules. On-site training may incur a fee, including instructor travel expenses.

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 mixes talent, skills, and expertise to deliver training that both is 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*.

Virtual Training

Webinars

Whether out of state or around the block, clients can attend CU*Answers University webinars both for free and without the cost of travel. 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 25* 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 everyone 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*.

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 about which clients may have forgotten. 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 tool set.

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. New CU*BASE tools and features are also discussed.

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 receive a quick overview of the latest CU*Answers lending products and services and learn how to use them to maximize their success in lending. Participants also learn lending best practices and strategies to help 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.

Meet AuditLink – A Cooperative Approach to Vendor & Contract Management

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 as well as explore key vendor management resources. Additionally, participants receive a full demonstration of the AuditLink vendor management site and service. Look for future announcements regarding these upcoming courses.

Xtend Spotlight Series

Held monthly and often multiple times throughout each 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 the Xtend products and services most popular among clients and members as well as receive insider tips about how to maximize their success in the areas of member communications, contact center support, bookkeeping, and mortgage servicing.

Online Training Resources

Booklets and Documentation

Knowledge Base

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. Access this resource at *kb.cuanswers.com/cuanswers/ext/kbsearch.aspx*.

CU*BASE Reference Materials

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

It's Me 247 Reference Materials

This site includes reference materials related to **It's Me 247** Online, Mobile, and Text Banking. This site also includes documentation on related products, such as eStatements, online membership applications, and the various Online Bill Pay options CU*Answers offers. Access **It's Me 247** reference materials at *cuanswers.com/resources/doc/its-me-247-reference*.

Special Interest Publications

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

Understanding Your CU*BASE Invoice

Designed for credit union accountants and CEOs, this resource 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 credit union five-year pricing overview. Visit *cuanswers.com/solutions/accounting/client_invoice* to access this resource.

Magazines

CUSO Magazine

This is a digital publication from the cuasterisk.com network. At CUSO Magazine, we aim to deliver interesting and entertaining stories about the topics and issues influencing the credit union industry. From strategy articles to client features, opinion pieces, and more, we hope you will subscribe and read. Interested in telling your own credit union's story? Contact us at *editors@cusomag.com* to get started! Visit the CUSO Magazine at *cusomag.com*.

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* both to learn more and subscribe to this newsletter.

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* to subscribe.

Client Services Report Newsletter

This monthly newsletter keeps clients informed of topical reference booklets and Knowledge Base items, with each one covering a specific area of the CU*BASE system. Visit the CU*Answers Store at *store.cuanswers.com/product/client-service-report-sign-up/* to learn more and subscribe to this newsletter.

Online Campus

We offer free, on-demand courses you can take anywhere at any time. Options for the CU*Answers University Online Campus are listed below:

Free Campus with Admin Access

CU*Answers University offers a wealth of on-demand courses, both credit union-specific and general CU*BASE, all available at no charge through the CU*Answers University free online campus. 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*.

Full Campus

The expanded campus includes everything the free campus includes as well as 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* 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 everyone 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*.

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 topics that corresponds to each of the thousands of screens that comprise CU*BASE GOLD. This library of CU*BASE-related information helps clients become CU*BASE GOLD power users. Visit *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 *https://www.cuanswers.com/resources/doc/its-me-247-reference/.*

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 tutorials for those who learn best by seeing the software in action. Access this resource at *https://help.cubase.org/steps/Content/Welcome.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 entity helps CU*Answers self-processing credit unions learn more about tools their operators use. 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*.

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. These offerings are outlined both 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, which is also available in DVD format, to learn about core cybersecurity concepts. This video includes a test to assess your knowledge. Access this resource at *open.cuanswers.com/cyber*.

Financial Literacy for Credit Union Board Directors

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

It's Me 247 How-To Video Series

This video series is designed for members but is also an excellent resource for new staff unfamiliar with **It's Me 247** Online Banking and the various Online Bill Pay options CU*Answers offers. These videos explain how to perform tasks both in Online Banking and Online Bill Pay. Visit *ondemand.cuanswers.com* to access this resource.

OnDemand

CU*Answers ondemand

Providing access to nearly 570 videos, the CU*Answers OnDemand site is the main repository for videos on CU*BASE and related products and services. This 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*.

Show Me the Steps Video Tutorials

A how-to companion to CU*BASE GOLD Online Help, Show Me the Steps offers close to 580 video tutorials that show clients the ins and outs of CU*BASE GOLD. With videos about everything from back office functions to lending tools, the Show Me the Steps video library has a video to answer any question CU*BASE users may have. This 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 *https://help.cubase.org/cubase/Welcome.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 will use daily to serve their members. To request credentials to access Bedrock, contact the CU*Answers Client Services & Education team at *education@cuanswers.com*. Visit *open.cuanswers.com/simulation* to learn more about this resource.

CU*BASE Custom Training Edition

Unlike Bedrock Community Credit Union, which is used by all CU*Answers online clients, CU*BASE Custom Training Edition (CTE) is a training environment used exclusively by a subscribing credit union. CU*BASE CTE is customized to mirror a 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.

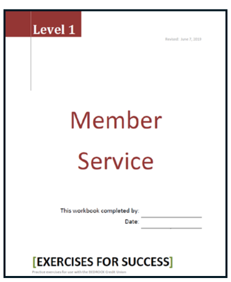
CU*BASE CTE gives credit unions a safe place to practice using CU*BASE tools, learn new skills, and experiment with new features without the risk of affecting their live member data. Since it is a copy of a credit union's files, both the product configurations and member accounts will be familiar and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

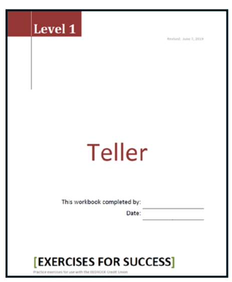
Whether introducing new employees to CU*BASE or helping existing employees practice new skills, CU*BASE CTE is perfect for keeping credit unions up to speed on the tools they will use daily to serve their members. Learn more by visiting the CU*Answers Store at *store.cuanswers.com/product/cubase-custom-training-edition*.

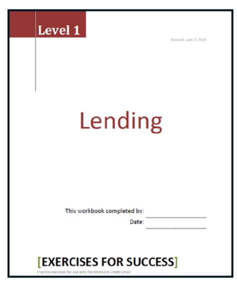
Exercises for Success

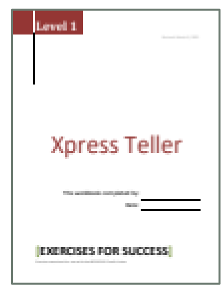
Designed for use with CU*BASE simulated training environments, this workbook series offers new CU*BASE users practical experience with common CU*BASE tasks. The series comprises three workbooks that reinforce key areas of credit union operations: Member Service, Teller Processing, Xpress Teller, and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

Activities are based on common member scenarios and are followed by a knowledge check learners can use to gauge their progress. The workbooks can be downloaded as PDF booklets here: *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.

Please 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 everyone on the CU*Answers Client News email distribution list. Contact the CU*Answers Writing Team at *clientnews@cuanswers.com* to be added to this list.

Training Events at a Glance

Below is a quick alphabetical listing of all training events CU*Answers and Xtend offers along with page numbers displaying detailed information about each event.

Asterisk Intelligence Week

Hosted by the CU*Answers Asterisk Intelligence (AI) Team, the events held during this week involve a series of sessions covering data analytics, data warehousing, and data management solutions. Specific solutions will be addressed, 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	Please watch for an email announcing dates for this event.
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 Strategies

This is a special event designed especially for credit union CEOs, and it is held typically during the first full week of November. The exact format of the 2023 event has not yet been determined, but the focus is on CEO-to-CEO interactions with your peers and CUSO leadership.

Dates	Please watch for an email announcing dates for this event, which is sent usually in November.
Location	Location to be determined. Please watch for an email invitation.
Registration	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 chance to learn about the driving forces behind CU*BASE development while collaborating 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.

Date	Please watch for an email announcing dates for this event, which is sent usually in April.
Location	CU*Answers, 6000 28th St. SE, Grand Rapids, MI 49546.
Registration	For registration details, please watch for an email invitation.

Collections Roundtable

The Collections Roundtable and Roundtable Recap keep clients in the know about 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. There are often guest speakers who are experts in collections-related issues.
- **Roundtable Recap** – Geared toward those unable to attend the Collections Roundtable, this webinar provides a summary of hot topics discussed during the most recent Roundtable event.

Dates

Collection Roundtable Events:

- Feb 9
- May 11
- Aug 8
- Nov 8

Roundtable Recap Webinars:

- Feb 23
- May 25
- Aug 22
- Nov 22

Location 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 wish to participate remotely. The Roundtable Recap is offered via webinar.

Registration 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 about 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.

Dates Please watch for an email announcing dates for this event.

Location For location details, please watch for an email invitation.

Registration 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 yearly based on current compliance hot topics, 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	TBD
Registration	For registration details, please watch for an email invitation.

Imaging Solutions Release Management Roundtable

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

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 CU*Answers offers, the annual CU*Answers Leadership Week welcomes credit union staff members from across the country. During this week's events, CU*BASE clients join the CU*Answers leadership Team both to celebrate past achievements and plan for future successes. Listed below are the events that encompass Leadership Week. Learn more at *cuanswers.com/events/lc*.

- **Xtend Early Bird Special Event** – During this event, Xtend staff members will share where they have been, where they are, and where they are headed in their efforts to help credit unions serve their members effectively.
- **Xtend Stockholder Meeting** – Geared toward CEOs and board chairs of Xtend owners, this meeting gives attendees an opportunity to hear the latest about this CUSO's performance over the past year and look ahead to the coming year. The official Xtend Board election will also occur during this meeting.
- **Cocktail Reception, sponsored by cuasterisk.com** – Welcoming all those attending the Xtend and 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.
- **Xtend and 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** – Created with CEOs and CU*Answers owners' board chairs in mind, 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 Geoff Johnson will also provide a report to owners. Additionally, the official CU*Answers Board election will happen during this meeting.
- **CU*Answers Golf Outing** – Topping off this 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 enjoying 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 both 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 bi-annually, Lender*VP Week condenses all CU*BASE lending courses into one week for those who want both 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, which begins on *page 85.*

Dates	• Summer session: June 26- June 30 • Winter session: Dec 11 -Dec 14
Location	Training will be held via webinar.
Registration	There is separate registration for each course offered during this event. To register for individual courses, visit *https://www.cuanswers.com/resources/edu/courses/.*

Sales & Marketing Roundtable

Hosted by Xtend, the bi-annual Sales and Marketing Roundtable allows credit union staff to network with other sales and marketing staff in the cuasterisk.com network as well as learn about the latest sales and marketing tools.

Dates	April 19, 2023
Location	Xtend, 6000 28th St. SE, Grand Rapids, MI 49546.
Registration	For registration details, please watch for an email invitation.

Xtend 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.

Date	March 22, 2023
Location	CU*Answers, 6000 28th St. SE, Grand Rapids, MI 49546.
Registration	For registration details, please watch for an email invitation.

Teller Training Day

This Client Services and Education program is geared both toward newer Tellers and experienced staff members seeking information about the CU*BASE Teller functions. For a complete list of courses offered in this half-day event, please refer to the Training Schedule beginning on *page 25*.

Dates

- February 16
- April 17
- June 13
- August 23
- October 12
- December 21

Location Training will be held via webinar.

Registration Visit *https://www.cuanswers.com/resources/edu/courses/* to register.

Member Service Training Day

This Client Services and Education program is geared both toward newer MSRs and experienced staff members seeking information about the CU*BASE Member Service functions. For a complete list of courses offered in this half-day event, please refer to the Training Schedule beginning on *page 25*.

Dates

- January 19
- March 21
- May 10
- July 11
- September 21
- November 14

Location Training will be held via webinar.

Registration Visit *https://www.cuanswers.com/resources/edu/courses/* to register.

University Week

CU*ANSWERS UNIVERSITY

Held quarterly, University Week includes within the span of seven days the most timely and relevant courses.

Dates

- January 23-26
- April 10-13
- July 17-21
- October 2-5

Location	In-person courses will be held at CU*Answers: 6000 28th St. SE, Grand Rapids, MI 49546.
Registration	There is separate registration for each course offered during this event. To register for individual courses, visit https://www.cuanswers.com/resources/edu/university-weeks/.

Xtension Contact Center Roundtable

Held bi-annually, this event lets contact center experts both discuss and consider call center best practices with their peers in the cuasterisk.com network. During this event, participants will have the opportunity to converse with other contact center professionals to gain fresh insights and new perspectives to add to their teams' action plans.

Dates	• May 4, 2023
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* to register for any of the courses below. For training event registration information, refer to the Training Events section beginning on *page 15.*

Date	Start Time	End Time	Course/Event Name	Format
January				
1/11	10:30 AM	11:30 AM	8.00 Managing Compliance Using CU*BASE	Webinar
1/12	3:00 PM	4:00 PM	9.75 Components of an Information Security Program	Webinar
1/13	3:00 PM	4:00 PM	8.07 Monitoring Abnormal Activity	Webinar
1/18	3:00 PM	4:00 PM	12.02 Online Credit Cards: Daily Maintenance and Reports	Webinar
1/19	*1:00 PM*	*4:30 PM*	*Member Services Training Day*	*Webinar*
1/20	2:00 PM	3:00 PM	15.03 Leadership Essentials for New Supervisors	Webinar
University Week (1/23 to 1/26)				
1/23	*10:30 AM*	*12:00 PM*	*1.01 Member Services: Account Inquiry and Phone Operator*	*Classroom & Webinar*
1/23	*3:00 PM*	*4:00 PM*	*13.05 CU Publisher: Launching the Secure Online Form Generator/Request Center*	*Classroom & Webinar*
1/24	*9:30 AM*	*10:30 AM*	*4.50 Web Accessibility and You*	*Classroom & Webinar*
1/24	*3:00 PM*	*4:00 PM*	*15.01 Providing First-Class Customer Service to Members*	*Classroom & Webinar*
1/25	*9:30 AM*	*10:30 AM*	*16.12 Getting Started with Unique Data Management (UDM)*	*Classroom & Webinar*
1/25	*1:00 PM*	*2:00 PM*	*5.85 Participation Loan Servicing: Understanding the Settlement Process*	*Classroom & Webinar*
1/25	*3:00 PM*	*4:00 PM*	*7.35 Social Engineering: The Human Side of Security*	*Classroom & Webinar*
1/26	*1:00 PM*	*2:00 PM*	*4.10 Introduction to CU*BASE Sales & Marketing Tools*	*Classroom & Webinar*
1/26	*2:30 PM*	*3:30 PM*	*4.12 Member Connect: Building a Communication Network within CU*BASE*	*Classroom & Webinar*
1/26	*4:00 PM*	*5:00 PM*	*16.13 Introduction to Visual Analytics Tools (VAT)*	*Classroom & Webinar*
February				

Date	Start Time	End Time	Course/Event Name	Format
2/2	1:00 PM	2:00 PM	8.09 Vendor Management 101	Webinar
2/2	3:00 PM	3:30 PM	9.70 Preparing for a Cybersecurity Incident Response	Webinar
2/6	2:00 PM	3:00 PM	4.15 Member Service Trackers, Leads, and Follow-Ups	Webinar
2/7	10:00 AM	11:00 AM	11.02 Working with Your Members Remotely	Webinar
2/7	3:30 PM	4:30 PM	3.15 Advanced General Ledger	Webinar
2/8	1:30 PM	3:00 PM	3.40 Credit Union Financials: Configuration, Printing, and Other Options	Webinar
2/9	*To be announced*		*Collections Roundtable*	*Classroom*
2/14	9:30 AM	10:30 AM	1.30 Head Teller Vault/Change Fund Management	Webinar
2/14	3:00 PM	3:30 PM	9.60 Unpacking the CU*Answers High-Availability (HA) Rollover Exercise	Webinar
2/15	11:00 AM	12:00 PM	13.02 MAP/MOP – Applying for Membership Online	Webinar
2/16	*1:00 PM*	*5:00 PM*	*Teller Training Day*	*Webinar*
2/22	3:00 PM	4:00 PM	2.00 CU*BASE Employee Security	Webinar
02/23	*2:00 PM*	*3:00 PM*	*Collections Roundtable Recap*	*Webinar*
March				
3/2	9:30 AM	10:30 AM	13.09 CU Publisher – Launching Mobile Manager, Mobile Alerts, and CU Info	Webinar
3/2	11:00 AM	12:00 PM	13.08 CU Publisher: Launching **It's Me 247** Manager	Webinar
3/3	10:00 AM	11:00 AM	12.03 Online Credit Cards: On the Front Line	Webinar
3/7	3:30 PM	4:30 PM	3.20 Balancing Made Easy	Webinar
3/8	2:00 PM	3:00 PM	13.03 Launching Your CU*Answers Mobile App	Webinar
3/14	10:00 AM	11:00 AM	4.40 CU*Statements	Webinar
3/21	*1:00 PM*	*4:30 PM*	*Member Service Training Day*	*Webinar*
3/22	*To be announced*		*Xtend Shared Branching*	*Classroom*
3/22	10:30 AM	12:00 PM	4.13 Cross Sales and Sales Trackers: Offering Members Relevant Opportunities	Webinar
3/22	2:00 PM	3:30 PM	4.95 Next Suggested Product: Targeted Sales Prompts	Webinar

Date	Start Time	End Time	Course/Event Name	Format
3/23	11:00 AM	12:00 PM	4.50 Web Accessibility and You	Webinar
April				
4/4	9:30 AM	10:30 AM	8.08 Internal Controls Best Practices	Webinar
4/5	4:30 PM	5:00 PM	9.65 How to Develop and Test your Business Continuity Plan	Webinar
4/6	10:00 AM	11:00 AM	11.02 Working with Your Members Remotely	Webinar
4/6	3:00 PM	4:00 PM	16.08 Microsoft Excel for Credit Unions	Webinar
University Week (4/10 to 4/13)				
4/10	*3:30 PM*	*5:00 PM*	*16.00 Data Warehouse Tools and Strategies*	*Classroom & Webinar*
4/11	*10:30 AM*	*12:00 PM*	*16.07 iSeries File Transfers: Moving Data from CU*BASE to Your PC*	*Classroom & Webinar*
4/11	*3:30 PM*	*4:30 PM*	*13.05 CU Publisher: Launching the Secure Online Form Generator/Request Center*	*Classroom & Webinar*
4/12	*9:30 AM*	*11:00 AM*	*5.81 Introduction to the Loan Fulfillment Center by Accenture*	*Webinar*
4/12	*11:00 AM*	*12:00 PM*	*4.15 Member Service Trackers, Leads, and Follow-Ups*	*Webinar*
4/12	*2:30 PM*	*4:00 PM*	*16.12 Getting Started with Unique Data Management (UDM)*	*Classroom & Webinar*
4/13	*9:30 AM*	*10:30 AM*	*2.00 CU*BASE Employee Security*	*Classroom & Webinar*
4/13	*11:15 AM*	*12:00 PM*	*12.01 Online Credit Cards: Loan Creation and Card Embossing*	*Classroom & Webinar*
4/17	*1:00 PM*	*5:00 PM*	*Teller Training Day*	*Webinar*
4/19	*To be announced*		*Sales and Marketing Roundtable*	*Classroom*
4/20	10:00 AM	11:00 AM	4.94 Making a Splash with Member Statements	Webinar
4/25	10:30 AM	11:30 AM	15.03 Leadership Essentials for New Supervisors	Webinar
4/25	3:30 PM	5:00 PM	1.20 Teller Techniques and Shared Branching Options	Webinar
4/26	10:30 AM	11:30 AM	15.04 The Art of Coaching	Webinar
May				
5/2	10:30 AM	11:30 AM	8.02 Using CU*BASE Tools for Bank Secrecy Act (BSA) Compliance	Webinar
5/2	3:30 PM	4:30 PM	16.10 CU*BASE Management Tools: Leadership Dashboards	Webinar

Date	Start Time	End Time	Course/Event Name	Format
5/3	10:00 AM	11:00 AM	16.12 Getting Started with Unique Data Management (UDM)	Webinar
5/4	2:30 PM	3:30 PM	3.25 SRS Bookkeeping Services: Sharing Our Policies and Procedures	Webinar
5/4	*To be announced*		*Xtension Contact Center Roundtable Spring Session*	*Webinar*
5/9	3:00 PM	4:00 PM	4.20 Wrap-Up Codes: Improving Your Member Phone Interactions	Webinar
5/10	*1:00 PM*	*4:30 PM*	*Member Services Training Day*	*Webinar*
5/11	*To be announced*		*Collections Roundtable*	*Classroom*
5/18	10:00 AM	11:00 AM	15.05 Conflict Resolution in the Workplace	Webinar
5/18	3:30 PM	4:00 PM	9.60 Unpacking the CU*Answers High-Availability (HA) Rollover Exercise	Webinar
5/23	3:00 PM	4:00 PM	16.13 Introduction to Visual Analytics Tools (VAT)	Webinar
5/25	1:00 PM	2:00 PM	Collections Roundtable Recap	Webinar
June				
6/5	2:00 PM	3:00 PM	3.26 5300 Tools: Call Report Techniques from Xtend SRS	Webinar
6/5	3:30 PM	4:30 PM	15.01 Providing First-Class Customer Service to Members	Webinar
6/6	9:30AM	10:30 AM	4.50 Web Accessibility and You	Webinar
6/6	3:30 PM	4:30 PM	1.30 Head Teller Vault and Change Fund Management	Webinar
6/8	9:30 AM	11:00 PM	1.01 Member Services: Account Inquiry and Phone Operator	Webinar
6/8	3:30 PM	4:30 PM	2.00 CU*BASE Employee Security	Webinar
6/12	10:00 AM	11:00 AM	13.09 CU Publisher: Launching Mobile Manager, Mobile Alerts, and CU Info	Webinar
6/12	1:30 PM	2:30 PM	13.08 CU Publisher: Launching **It's Me 247** Manager	Webinar
6/13	*1:00 PM*	*5:00 PM*	*Teller Training Day*	*Webinar*
6/20	10:30 AM	12:00 PM	4.13 Cross Sales and Sales Trackers: Offering Members Relevant Opportunities	Webinar
6/20	2:00 PM	3:30 PM	4.95 Next Suggested Product: Targeted Sales Prompts	Webinar
6/21	3:00 PM	4:00 PM	7.35 Social Engineering: The Human Side of Security	Webinar
6/22	3:30 PM	4:30 PM	8.00 Managing Compliance Using CU*BASE	Webinar

Date	Start Time	End Time	Course/Event Name	Format
Lender*VP Week (6/26 to 6/30)				
6/26	*9:30 AM*	*10:30 AM*	*5.00 Designing CU*BASE Loan Products*	*Webinar*
6/26	*11:00 AM*	*12:00 PM*	*5.10 Lending from Request to Disbursement: Understanding the Application Process*	*Webinar*
6/26	*2:30 PM*	*4:00 PM*	*5.11 CU*BASE Mortgage Processing*	*Webinar*
6/27	*9:30 AM*	*10:30 AM*	*5.12 CU*BASE Escrow Processing*	*Webinar*
6/27	*11:00 AM*	*12:00 PM*	*5.30 Open-End and Line-of-Credit Lending*	*Webinar*
6/27	*2:30 PM*	*4:00 PM*	*5.20 Organizing a Loan Department and Servicing Loans on CU*BASE*	*Webinar*
6/28	*9:30 AM*	*10:30 AM*	*5.40 Managing Bankruptcy*	*Webinar*
6/28	*11:00 AM*	*12:00 PM*	*5.70 Centralized Underwriting: Inquiry for Loans in Process*	*Webinar*
6/28	*2:30 PM*	*4:00 PM*	*5.50 Interactive Online Collections*	*Webinar*
6/29	*11:00 AM*	*12:00 PM*	*5.76 Managing Delivery Channels*	*Webinar*
6/29	*2:30 PM*	*4:00 PM*	*5.79 Real Estate Solutions*	*Webinar*
July				
7/10	10:00 AM	11:00 AM	15.02 Interviewing Skills with a Credit Union Slant	Webinar
7/11	10:30 AM	11:30 AM	16.08 Microsoft Excel for Credit Unions	Webinar
7/11	*1:00 PM*	*4:30 PM*	*Member Services Training Day*	*Webinar*
7/12	9:30 AM	10:30 AM	4.10 Introduction to CU*BASE Sales and Marketing Tools	Webinar
7/12	1:00 PM	2:00 PM	4.12 Member Connect: Building a Communication Network within CU*BASE	Webinar
7/14	3:30 PM	4:30 PM	15.04 The Art of Coaching	Webinar
University Week (7/17 to 7/21)				
7/17	*9:30 AM*	*10:00 AM*	*16.12 Getting Started with Unique Data Management (UDM)*	*Classroom & Webinar*
7/17	*10:30 AM*	*11:30 AM*	*4.50 Web Accessibility and You*	*Classroom & Webinar*
7/18	*10:30 AM*	*11:30 AM*	*15.03 Leadership Essentials for New Supervisors*	*Classroom & Webinar*
7/18	*2:30 PM*	*3:00 PM*	*9.65 How to Develop and Test your Business Continuity Plan*	*Classroom & Webinar*

Date	Start Time	End Time	Course/Event Name	Format
7/18	*3:30 PM*	*4:30 PM*	*12.02 Online Credit Cards: Daily Maintenance/Reports*	*Classroom & Webinar*
7/19	*10:30 AM*	*11:30 AM*	*8.07 Monitoring Abnormal Activity*	*Classroom & Webinar*
7/19	*2:00 PM*	*3:00 PM*	*5.86 Secondary Market Loan Servicing: Understanding the Settlement Process*	*Webinar*
7/19	*3:30 PM*	*4:30 PM*	*13.05 CU Publisher: Launching the Secure Online Form Generator/Request Center*	*Classroom & Webinar*
7/20	*10:00 AM*	*11:00 AM*	*13.03 Launching Your CU*Answers Mobile App*	*Classroom & Webinar*
August				
8/2	3:00 PM	4:00 PM	8.09 Vendor Management 101	Webinar
8/2	3:30 PM	4:30 PM	3.15 Advanced General Ledger	Webinar
8/3	9:30 AM	10:30 AM	11.02 Working with Your Members Remotely	Webinar
8/3	3:30 PM	5:00 PM	3.40 Credit Union Financials: Configuration, Printing, and Other Options	Webinar
8/8	*To be announced*		*Collections Roundtable*	*Classroom*
8/9	10:00 AM	11:00 AM	2.00 CU*BASE Employee Security	Webinar
8/15	9:30 AM	10:30 AM	16.13 Introduction to Visual Analytics Tools (VAT)	Webinar
8/16	10:00 AM	11:00 AM	15.05 Conflict Resolution in the Workplace	Webinar
8/17	2:00 PM	3:00 PM	3.25 SRS Bookkeeping Services: Sharing Our Policies and Procedures	Webinar
8/22	*3:00 PM*	*4:00 PM*	*Collections Roundtable Recap*	*Webinar*
8/23	*1:00 PM*	*5:00 PM*	*Teller Training Day*	*Webinar*
8/24	3:00 PM	4:00 PM	4.50 Web Accessibility and You	Webinar
September				
9/6	10:30 AM	11:30 AM	4.15 Member Service Trackers, Leads, and Follow-Ups	Webinar
9/6	3:30 PM	4:30 PM	3.20 Balancing Made Easy	Webinar
9/7	10:00 AM	10:30 AM	9.60 Unpacking the CU*Answers High-Availability (HA) Rollover Exercise	Webinar
9/7	3:30 PM	4:30 PM	4.40 CU*Statements	Webinar
9/18	9:30 AM	10:00 AM	9.70 Preparing for a Cybersecurity Incident Response	Webinar

Date	Start Time	End Time	Course/Event Name	Format
9/19	3:30 PM	4:30 PM	5.85 Participation Loan Servicing: Understanding the Settlement Process	Webinar
9/21	*1:00 PM*	*4:30 PM*	*Member Services Training Day*	*Webinar*
9/25	3:30 PM	4:30 PM	15.01 Providing First-Class Customer Service to Members	Webinar
9/26	10:00 AM	11:00 AM	13.09 CU Publisher: Launching Mobile Manager, Mobile Alerts, and CU Info	Webinar
9/27	10:00 AM	11:00 AM	13.08 CU Publisher: Launching **It's Me 247** Manager	Webinar
October				
University Week (10/2 to 10/5)				
10/2	*9:30 AM*	*11:00 AM*	*16.00 Data Warehouse Tools & Strategies*	*Classroom & Webinar*
10/2	*1:30 PM*	*2:30 PM*	*8.02 Using CU*BASE Tools for Bank Secrecy Act (BSA) Compliance*	*Classroom & Webinar*
10/2	*3:00 PM*	*4:00 PM*	*12.03 Online Credit Cards: On the Front Line*	*Classroom & Webinar*
10/3	*9:30 AM*	*11:00 AM*	*1.20 Teller Techniques and Shared Branching Options*	*Classroom & Webinar*
10/3	*1:30 PM*	*3:00 PM*	*16.12 Getting Started with Unique Date Management (UDM)*	*Classroom & Webinar*
10/3	*3:30 PM*	*4:30 PM*	*4.94 Making a Splash with Member Statements*	*Classroom & Webinar*
10/4	*9:30 AM*	*11:00 AM*	*9.60 Unpacking the CU*Answers High-Availability (HA) Rollover Exercise*	*Classroom & Webinar*
10/4	*1:00 PM*	*2:00 PM*	*16.08 Microsoft Excel for Credit Unions*	*Classroom & Webinar*
10/4	*2:30 PM*	*3:00 PM*	*13.05 CU Publisher: Launching the Secure Online Form Generator/Request Center*	*Classroom & Webinar*
10/5	*9:30 AM*	*10:30 AM*	*8.08 Internal Controls Best Practices*	*Classroom & Webinar*
10/5	*10:30 AM*	*12:00 PM*	*4.13 Cross Sales and Sales Trackers: Offering Members Relevant Opportunities*	*Classroom & Webinar*
10/5	*2:00 PM*	*3:30 PM*	*4.95 Next Suggested Product: Targeted Sales Prompts*	*Classroom & Webinar*
10/10	3:00 PM	4:00 PM	4.20 Wrap-Up Codes: Improving Your Member Phone Interactions	Webinar
10/11	10:15 AM	11:00 AM	12.01 Online Credit Cards: Loan Creation and Card Embossing	Webinar
10/12	*1:00 PM*	*5:00 PM*	*Teller Training Day*	*Webinar*
10/16	3:00 PM	4:00 PM	4.40 CU*Statements	Webinar
10/17	11:00 AM	12:00 PM	15.05 Conflict Resolution in the Workplace	Webinar

Date	Start Time	End Time	Course/Event Name	Format
10/19	10:30 AM	11:30 AM	15.02 Interviewing Skills with a Credit Union Slant	Webinar
10/24	10:00 AM	11:00 AM	2.00 CU*BASE Employee Security	Webinar
10/24	3:30 PM	4:30 PM	16.10 CU*BASE Management Tools: Leadership Dashboards	Webinar
10/25	9:30 AM	10:30 AM	4.10 Introduction to CU*BASE Sales and Marketing Tools	Webinar
10/25	1:00 PM	2:00 PM	4.12 Member Connect: Building a Communication Network within CU*BASE	Webinar
November				
11/6	3:30 PM	4:30 PM	16.12 Getting Started with Unique Data Management (UDM)	Webinar
11/7	3:00 PM	4:00 PM	3.26 5300 Tools: Call Report Techniques from Xtend SRS	Webinar
11/8	*To be announced*		*Collections Roundtable*	*Classroom*
11/9	3:00 PM	4:00 PM	11.02 Working with Your Members Remotely	Webinar
11/14	*1:00 PM*	*4:30 PM*	*Member Services Training Day*	*Webinar*
11/20	4:00 PM	5:00 PM	9.75 Components of an Information Security Program	Webinar
11/22	*3:00 PM*	*4:00 PM*	*Collections Roundtable Recap*	*Webinar*
December				
12/5	10:00 AM	11:00 AM	15.05 Conflict Resolution in the Workplace	Webinar
12/5	3:00 PM	4:30 PM	5.81 Introduction to the Loan Fulfillment Center by Accenture	Webinar
Lender*VP Week (12/11 to 12/14)				
12/11	*9:30 AM*	*10:30 AM*	*5.00 Designing CU*BASE Loan Products*	*Webinar*
12/11	*11:00 AM*	*12:00 PM*	*5.10 Lending from Request to Disbursement: Understanding the Application Process*	*Webinar*
12/11	*2:30 PM*	*4:00 PM*	*5.11 CU*BASE Mortgage Processing*	*Webinar*
12/12	*9:30 AM*	*10:30 AM*	*5.12 CU*BASE Escrow Processing*	*Webinar*
12/12	*11:00 AM*	*12:00 PM*	*5.30 Open-End and Line-of-Credit Lending*	*Webinar*
12/12	*2:30 PM*	*4:00 PM*	*5.20 Organizing a Loan Department and Servicing Loans on CU*BASE*	*Webinar*
12/13	*9:30 AM*	*10:30 AM*	*5.40 Managing Bankruptcy*	*Webinar*

Date	Start Time	End Time	Course/Event Name	Format
12/13	*11:00 AM*	*12:00 PM*	*5.70 Centralized Underwriting: Inquiry for Loans in Process*	*Webinar*
12/13	*2:30 PM*	*4:00 PM*	*5.50 Interactive Online Collections*	*Webinar*
12/14	*11:00 AM*	*12:00 PM*	*5.76 Managing Delivery Channels*	*Webinar*
12/14	*2:30 PM*	*4:00 PM*	*5.79 Real Estate Solutions*	*Webinar*
12/19	10:30 AM	11:30 AM	5.86 Secondary-Market Loan Servicing: Understanding the Settlement Process	Webinar
12/20	9:30 AM	10:30 AM	16.13 Introduction to Visual Analytics Tools (VAT)	Webinar
12/21	*1:00 PM*	*5:00 PM*	*Teller Training Day*	*Webinar*

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, and an on-demand equivalent or supplemental workshop where 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 courses. Interested in a specific course category? Look no further!

Course Categories

Below is an alphabetical listing of all course categories with the page numbers on which those course syllabi begin:

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.

Lani

Client Services & Education

CU*ANSWERS Client Services & Education

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

2.00 CU*BASE Employee Security

0.10 Introduction to CU*BASE

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. This course also 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 into 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

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 will 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

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.

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, including 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

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 shows 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

1.30 Head Teller Vault/Change Fund Management

1 hour | Scheduled | Teller/Member Service

Summary

This course is based both 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 is 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 and maintaining certificates throughout a normal member-service day. The automated cycling of certificate products and member requests will be covered in detail.

Audience

This course is designed for all personnel involved in selling, maintaining, tracking, and marketing certificate products. It is also a great 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, including 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

1.50 Day-to-Day Savings Products

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 as well as overdraft protection.

Audience

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

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

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. This course also covers reporting, forms, and other IRS-related issues handled by CU*BASE.

With the changes to the IRA processing rules and 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

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

2.00 CU*BASE Employee Security

1 hour | Scheduled | Teller/Member Service

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 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 want 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

Management

Geoff

President/COO

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.

CU*ANSWERS Management Services

Courses at a Glance

- 2.10 Designing Savings and Certificate Products
- 2.11 Introduction to Miscellaneous Member Account Forms
- 2.30 Rate Maintenance and 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

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 both 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 and CU*BASE Tools for Pricing Products

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 each credit union manager control rates in a more professional and documented method.

Audience

This course is designed for operators, marketing staff, and financial analysts, and it is also a great 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 frontline
- 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

1 hour | By Request | Management

Summary

This course offers a review of the different CU*BASE variable-rate control features both for 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 it is a great 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 communicate effectively 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 both for 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 related credit union responsibilities

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 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 as well as the associated interactive product offers. 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 as well as give the creative manager several different views of the credit union's financial performance. With more than 99 configurable reports available, the manager can divide the budget process down to a workable, 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

2.96 Using AnswerBook to Find Answers and Track Staff Questions

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 ensure each credit union employee has direct access to the information they need to serve members. Not only can you scan multiple categories for commonly asked and answered questions, but 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 various 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

Danielle

Xtend SRS

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.

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 and 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

3.00 Introduction to Accounting

1 hour | By Request | Accounting/Back Office

Summary

This course concentrates on the daily accounting 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 how they affect 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

3.10 Introduction to General Ledger Tools

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

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 generated daily? 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

3.20 Balancing Made Easy

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 NCUA 5300 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
- 5300 NCUA Call Report
- CU*BASE reports available

3.25 SRS Bookkeeping Services: Sharing Our Policies and Procedures

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

3.26 5300 Tools: Call Report Techniques from Xtend SRS

1 hour | Scheduled | Accounting/Back Office

Summary

This course shares proven methods Xtend SRS uses when they complete 5300 Call Reports for their clients. Hear tips from experts about restructuring your configurations, developing new report formats, and making decisions to simplify your 5300 preparations.

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 NCUA 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 NCUA 5300 Call Report instructions
- How to improve the amount of review time it takes you each quarter
- NCUA 5300 Call Report definition
- Give to auditors
- Statistical reports
- Member trial balance
- Loan-information reports
- Trial balance
- Delinquency
- Rate analysis
- Reading the NCUA Call Report in CU*Spy

3.30 Credit Union Checks and Accounts Payable

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

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

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 as well as 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
- NCUA 5300 financials

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

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, this course concentrates on the accounting of these key expenses.

The training portion of this course outlines both 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 unions' 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 aforementioned 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

3.51 General Ledger Subsidiary Products: Working with Investments

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 both 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 unions' 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

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

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 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

3.61 Member Payroll Processing

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. This course will also show participants CU*BASE tools they can use 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

3.62 ACH Processing

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 as well as 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

3.95 Year-End Planning for All Credit Unions

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

3.96 Preparing for Multi-Corporation Processing

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

This course is designed for all credit union leaders and managers responsible for processing decisions. CFOs can also benefit from attending.

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 accounts
- 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.

Liz

Xtend

Courses at a Glance

- 4.10 Introduction to CU*BASE Sales and Marketing Tools
- 4.12 Member Connect: Building a Communication Network within CU*BASE
- 4.13 Cross-Sales and Sales Trackers: Offering Members Relevant Opportunities
- 4.15 Member Service Trackers, Leads, and Follow-Ups
- 4.20 Wrap-Up Codes: Improving Your Member Phone Interactions ★
- 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 ✎

4.10 Introduction to CU*BASE Sales and Marketing Tools

1 hour | Scheduled | Sales & 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.

Objectives

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

- Identify CU*BASE marketing tools 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

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

1 hour | Scheduled | Sales & 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.

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

4.13 Cross-Sales and Sales Trackers: Offering Members Relevant Opportunities

1.5 hours | Scheduled | Sales & Marketing

Summary

In this course, attendees will 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 easily accessible from member service screens.

Sales Trackers allow staff to review easily prior conversations on a topic 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 dashboards.

Audience

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

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

4.15 Member Service Trackers, Leads, and Follow-Ups

1 hour | Scheduled | Sales & Marketing

Summary

In this course, participants will gain practical knowledge about 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

4.20 Wrap-Up Codes: Improving Your Member Phone Interactions

1 hour | Scheduled | Sales & Marketing

Summary

Uncover the reasons your members call and dive deep into better understanding the members who call your credit union with this course. Starting with how Wrap-Up Codes can change your credit union and finishing with quick and easy analysis options, this course covers everything for Wrap-Up Code Implementation from start to finish with Xtend's resident data expert.

Wrap Up Codes allow your staff to quickly enter why members called your credit union and use 1-Click Trackers, saving your staff precious seconds on all phone interactions.

Audience

This class is designed for call center managers, member service representatives, marketing personnel, call center agents, supervisors, and operations officers.

Objectives

By the completion of this course, participants will have:

- Discussed the purpose and function of CU*BASE Wrap-Up Codes
- Explored how Wrap-Up Codes enhance knowledge of your membership and improve operations
- Investigated the use of 1-Click Trackers

Topics Covered

- Configuring and implementing Wrap-Up Codes: Call Types and Primary Subject Codes
- Configuring employee IDs to force Wrap-Up Code Usage
- Understanding Tool #1315: Why Your Members Call

4.40 CU*Statements

1 hour | Scheduled | Sales & 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 must be met to ensure accurate and timely statement production.

Audience

This course is designed for marketing personnel and all 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

4.50 Web Accessibility and You

1 hour | Scheduled | Sales & 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 credit union leaders.

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

4.90 Introduction to WordPress with SiteControl

1 hour | By Request | Sales & 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 website goals
- 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

4.91 Advanced WordPress with SiteControl

1 hour | By Request | Sales & 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 introduction course first, but it is not a pre-requisite to 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 sites, 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 who 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:

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

4.94 Making a Splash with Member Statements

1 hour | Scheduled | Sales & Marketing

Summary

Statement onserts are the equivalent of statement inserts without the added paper required or 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

4.95 Next Suggested Product: Targeted Sales Prompts

1.5 Hours | Scheduled | Sales & Marketing

Summary

Next Suggested Product is a unique and valuable sales tool that 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 the most relevant news opportunities.

Use the knowledge from this class to build a framework of sales prompts both 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.

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, participation loan servicing.

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
5.76 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

5.00 Designing CU*BASE Loan Products

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 and examination reporting, CU*BASE leads the way in flexibility and creative processing for today's loan team. This course concentrates on the broad picture both 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

5.10 Lending from Request to Disbursement: Understanding the Application Process

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

5.11 CU*BASE Mortgage Processing

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 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

5.12 CU*BASE Escrow Processing

1.5 hours | Scheduled | Lender*VP

Summary

In this course, participants will review CU*BASE options both 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 have not 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)

5.15 Investor Relations

1 hour | By Request | Lender*VP

Summary

Investor opportunities take a variety of forms. This course 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 owned by an investor.

Audience

This course is designed for 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

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

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 workflow 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, and ACH/payroll)
- Understanding CU*BASE payment history

5.30 Open-End and Line of Credit Lending

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 re-calculate 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

5.40 Managing Bankruptcy

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 cannot do, and making sure the account is tracked and treated appropriately.

Audience

This course is designed for 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 communicate digitally 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

5.50 Interactive Online Collections

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

5.70 Centralized Underwriting: Inquiry for Loans in Process

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 geared especially 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

5.71 Laser Forms Management

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

5.76 Managing Delivery Channels

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 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.

5.79 Real Estate Solutions

1.5 hours | Scheduled | Lender*VP

Summary

This course introduces the suite of tools and solutions offered by CU*Answers to help both 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

5.80 Participation Lending Strategies

1 hour | By Request | Lender*VP

Summary

Participation opportunities take many forms. This course 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

5.81 Introduction to the Loan Fulfillment Center by Accenture

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, 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

5.85 Participation Loan Servicing: Understanding the Settlement Process

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 sold partially to other financial institutions. The system tracks investing financial institutions and the loans that they have purchased. It settles automatically 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 (PART) category

5.86 Secondary Market Loan Servicing: Understanding the Settlement Process

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 percent of the loan is sold into the market, but the credit union retains servicing. This feature both 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 settles automatically 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 in 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 (PART) category
- 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 (PART) category

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.

Jeff

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

OpsEngine

OpsEngine CU ANSWERS

6.00 Organizing and Managing Your Operations Center

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 increasingly 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 recovery

6.10 iSeries System Security

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

6.20 iSeries Management and System Tools

3 hours | By Request | Self-Processing

Summary

While data processing marketing staff would like to convince you otherwise, there is more to the iSeries than plugging it in and turning it on. If you feel you are facing purchasing decisions constantly as to more disk, more memory, and new equipment, it is important you understand how to get the most for your dollar. CU*Answers understands 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

6.30 Managing Your Hardware Resources and Relationships

1.5 hours | By Request | Self-Processing

Summary

When your credit union became a self-processor and decided 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 do not have all the answers, but they can help by combining the purchasing needs of CU*Answers' online service company with those 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.

Dave

Network Services

Courses at a Glance

7.00 CU*BASE GOLD: Customizable Features and Tools

7.15 CU*BASE Hardware and Communications

7.20 CU*BASE GOLD Updates and Support

7.25 Configuring CU*BASE Software

7.35 Social Engineering: The Human Side of Security

CU*ANSWERS Network Services

7.00 CU*BASE GOLD: Customizable Features and Tools

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 will also have 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 pages

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

7.15 CU*BASE Hardware and Communications

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

7.20 CU*BASE GOLD Updates and Support

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 networks can handle a CU*BASE update with minimal effort on their parts.

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

7.25 Configuring CU*BASE Software

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

7.35 Social Engineering: The Human Side of Security

1 hour | Scheduled | Secure-U

Summary

In this course, participants explore social engineering and steps they can take to reduce this threat. This course will lead participants through real-world examples of social engineering attacks via email, phone, SMS, shoulder surfing, and more. Participants will also look at real examples of attacks as well as 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

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.

Jim

AuditLink

AuditLink

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

8.00 Managing Compliance Using CU*BASE

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, dormancy issues, and other related issues brought forward by course participants. Course participants will also get a look at CU*BASE tools that will help them prepare both 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

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

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 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

8.03 Key Factors to Evaluate in Your Agreements

1 hour | By Request | Enterprise Risk Management

Summary

This course will discuss some of the nuances with respect to evaluating agreements with third parties as well as 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

8.04 Using CU*BASE to Calculate Risk

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 both 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

8.05 Fundamentals of Enterprise Risk Management

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

8.06 Understanding Credit Union Liability for Security Breaches

1 hour | By Request | Enterprise Risk Management

Summary

This course will help participants understand both 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

8.07 Monitoring Abnormal Activity

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 related frequently to fraud.

Audience

This course is designed both 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 Customer Identification Program (CIP) into the account opening and ongoing monitoring process
- Configuring and using the due diligence fields on the system
- Using the high-risk report functions for both high-risk members and employee activity
- Reviewing the sampling tools that help uncover potential transactional risk
- Configuring and using the Abnormal Activity Monitoring feature
- Exploring other tools associated with compliance-related requirements

8.08 Internal Controls Best Practices

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. It will also cover CU*BASE tools that can aid credit unions in building sound internal control structures. Additionally, this 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, and ACH activity on general ledger accounts
- Suspense and settlement accounting
- Internal practices that lead to a stronger control structure

8.09 Vendor Management 101

1 hour | Scheduled | Enterprise Risk Management

Summary

This course covers the nuances of a solid vendor-management program. It 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.

Jim

Business Continuity

CU*ANSWERS Business Continuity

Courses at a Glance

9.60 Unpacking the CU*Answers High-Availability (HA) Rollover Exercise

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

9.60 Unpacking the CU*Answers High-Availability (HA) Rollover Exercise

30 minutes | Scheduled | Secure-U

Summary

A key component of the CU*Answers Business Continuity Program is the High-Availability (HA) Rollover. Performed every six months, it's the best evidence we can provide that recovery teams are prepared to respond should a disruptive incident occur at the production data center. Most credit unions are aware of these exercises, but do they really know what happens behind the scenes or how to get the most value from these events as part of their vendor due diligence programs?

In this 30-minute webinar, we'll unpack the process of planning and conducting the HA rollover and introduce the audience to resources available on the CU*Answers web site. This will include gap analysis reports and information on systems availability across time zones.

Audience

This course is geared toward credit union professionals responsible for the vendor management program and those involved in the development and testing of the Business Continuity Plan.

Objectives

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

- Understand the process, purpose, and value of the HA rollover exercise as part of the CU*Answers Business Continuity Program.
- Better prepare their credit union in advance for the HA rollover exercise
- Report to their Board of Directors as well as IT auditors and examiners on the results of the rollover exercises
- Discover resources available on the CU*Answers web site to track the progress of the HA rollover program and systems availability

Topics

This course covers the following topics:

- The CU*Answers 'Systems Availability' web page
- Overview of the CU*Answers High Availability Program
- Purpose of the High Availability Rollover Exercise
- The value each HA rollover provides to the CUSO and to the credit union network
- Steps each credit union should take to prepare for the HA rollover exercise
- The CU*Answers HA Rollover Gap Analysis Report
- Enhancing operational resilience at the credit union through Business Continuity planning

9.65 How to Develop and Test Your Business Continuity Plan

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 cybersecurity and disaster recovery 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

9.70 Preparing for a Cybersecurity Incident Response

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 Plans with the goal of responding more quickly and effectively to the next incident that threatens to disrupt credit union operations. This course will also walk participants through a typical response and show them the steps required to detect, contain, remediate, and recover from a threat.

Additionally, participants will 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

10.01 Relationship Management: Clubs and Tiered Services Programs

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

10.02 Dividend Processing and Member Deposits

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 and 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

Kyle

Imaging Solutions

11.00 Creating and Improving Your Imaging Strategy

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 also identified and discussed.

Audience

This course is designed for those either who are without a current imaging strategy or 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

11.01 Using CU*BASE Loan Forms with Imaging Solutions

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 is 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 and is not warranted in relation to eLoan forms
- Describe how eLoan forms can make credit union lending more efficient and improve member service
- Sign into 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 who 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 receive support
- Questions and answers

11.02 Working with Your Members Remotely

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 also learn how to begin implementing eSignatures, Virtual StrongBox, and Enhanced Online Vault as well as 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

11.03 CU*BASE Data Retention Issues

1 hour | By Request | Imaging Solutions

Summary

Few issues 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

11.04 CU*Spy Online Reports and Statement Retrieval

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 a worried member, CU*Spy gives everyone access to important archived information from any connected CU*BASE terminal.

Audience

This course is designed for all credit union personnel.

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 the 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 the Find feature 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 are 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.

Heather

Managed Services

SettleMINT EFT
CU*ANSWERS Management Services

Courses at a Glance

12.00 Standard ATM and Debit Card Platform

12.01 Online Credit Cards: Loan Creation and Card Embossing

12.02 Online Credit Cards: Daily Maintenance and Reports

12.03 Online Credit Cards: On the Frontline

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

12.00 Standard ATM and Debit Card Platform

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 both powerful and intuitive. This course examines the configurations for 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
- Re-issue 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 and debit card platform
- Tools within the Online ATM/Debit/Credit Card Tools category (PLASTICS)
- PIN- and signature-based vendor configurations
- Stand-in processing, setting daily limits
- BIN setups
- General ledger account recommendations
- Secured funds hold configuration
- Cardstock options and embossing rules
- Network activity inquiry
- Understanding vendor configurations
- Best practices for servicing card programs
- Daily and monthly reports

12.01 Online Credit Cards: Loan Creation and Card Embossing

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 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

12.02 Online Credit Cards: Daily Maintenance and Reports

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
- Updating and ordering cards
- Payment change
- Fixed payments

12.03 Online Credit Cards: On the Frontline

1 hour | Scheduled | SettleMINT EFT

Summary

In this course, participants learn how to find details about credit card accounts both 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 is also geared toward staff members with 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 an adjustment has on an account
- How to ensure you are performing the adjustment to achieve the correct results

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

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 canceling payments

12.05 Online Credit Card Processing: Product Overview

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

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

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

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

1 hour | By Request | SettleMINT EFT

Summary

This course introduces participants to the Single Sign-On (SSO) 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
- Fiserv support

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

1 hour | By Request | SettleMINT EFT

Summary

This course introduces participants to the SSO 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 regarding **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 and 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

12.09 ATM Processing

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 ATM and debit cards have had on the credit union industry
- Explain how the CU*BASE plastics file feature can communicate information to frontline 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 and MOP: Applying for Membership Online

13.03 Launching Your CU*Answers Mobile App

13.04 Deploying Your Mobile Experience Center (MXC)

13.05 CU Publisher: Launching the 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 (PIB)

13.08 CU Publisher: Launching **It's Me 247** Manager ★

13.09 CU Publisher: Launching Mobile Manager, Mobile Alerts, and CU Info ★

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

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.

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
- **It's Me 247** Text Banking
- **It's Me 247** navigation features
- Getting started with customization

13.01 Shopping the IRSC Online Store

1 hour | By Request | IRSC

Summary

This course shows participants how the IRSC can help their credit unions become Internet retailers. 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.

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 start shopping for products at the IRSC Online Store

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

13.02 MAP and MOP: Applying for Membership Online

1 hour | Scheduled | IRSC

Summary

In this course, participants learn both about the online membership application and the automated membership-opening process that allows a non-member not only to 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.

Objectives

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

- Explain the difference between Membership Application Process (MAP) and Membership Opening Process (MOP)
- Explain the risks involved in implementing an online membership application
- List the steps involved in launching a MAP and MOP site

Topics

This course covers the following topics:

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

13.03 Launching Your CU*Answers Mobile App

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 both to 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.

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

13.04 Deploying Your Mobile Experience Center (MXC)

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 unions' websites. Additionally, participants learn how to include links both 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

13.05 CU Publisher: Launching the Secure Online Form Generator/Request Center

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. Topics in this course give participants the tools they need to get started using the 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

13.06 **It's Me 247** Online Banking

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 and 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 and Loan Account Tools
- Active Beta Development
- Management Forecasting Tools and Reports
- Miscellaneous Back Office Tools

13.07 Providing Added Security in Online Banking with the Personal Internet Branch (PIB)

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

13.08 CU Publisher: Launching **It's Me 247** Manager ★

1.5 hours | Scheduled | IRSC

Summary

This course shows participants how to launch **It's Me 247** Manager, a web-based solution that allows credit unions to design their online banking navigation and branding. Learning how to upload advertisements and create a custom navigation of your credit union Online Banking is part of this course.

Topics in this course give participants the tools they need to get started using these features within CU Publisher.

Audience

This course is designed for all credit union personnel.

Objectives

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

- Use the branding option within **It's Me 247** Manager
- Configure custom advertisements within Online Banking
- Configure the custom navigation of Online Banking

Topics

This course covers the following topics:

- Updating your credit union branding within Online Banking
- Creating custom navigation of Online Banking
- Updating your credit union information
- Working within CU Publisher

13.09 CU Publisher: Launching Mobile Manager, Mobile Alerts, and CU Info ★

1.5 hours | Scheduled | IRSC

Summary

This course shows participants how to launch Mobile Manager and Mobile Alerts as well as access CU Info, a web-based solution that allows credit unions to design their mobile app and some areas of online banking. Learning how to upload advertisements and create a custom navigation of your credit union mobile app is part of this course.

Topics in this course give participants the tools they need to get started using these features within CU Publisher.

Audience

This course is designed for all credit union personnel.

Objectives

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

- Use Mobile Manager
- Configure your own Mobile Alerts
- Update your Credit Union information within CU Info

Topics

This course covers the following topics:

- Working your credit union mobile app content
- Configuring mobile alerts that display within your credit union mobile app
- Updating your credit union information
- Working within CU Publisher

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.

Amber

ORD

Organizational Resource Development
Building Teams

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

15.01 Providing First-Class Customer Service to Members

1 hour Scheduled ORD

Summary

Many say 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 both for 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

15.02 Interviewing Skills with a Credit Union Slant

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 to ask and avoid during interviews

Topics

This course covers the following topics:

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

15.03 Leadership Essentials for New Supervisors

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 also different priorities. 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 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

15.04 The Art of Coaching

1 hour Scheduled ORD

Summary

One of the most difficult challenges a supervisor faces is knowing how to coach effectively an employee who is not performing up to expectations. Helping the employee understand the reason for the coaching and addressing the issue both 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

15.05 Conflict Resolution in the Workplace

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 those in a leadership or supervisory role who may need to act as a mediator may benefit particularly.

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

Annalyn

Asterisk Intelligence

Taught by the Asterisk Intelligence team, courses in this category help credit union staff get the most out of CU*BASE data both by introducing them to the many different data warehouses CU*Answers offers and 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 16 for details.

Courses at a Glance

16.00 Data Warehouse Tools and 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 and Inquiries

16.05 Report Builder (Query) 2: Building Custom Reports

16.06 Report Builder (Query) 3: Database Files and 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)

16.00 Data Warehouse Tools and Strategies

1 hour | By Request | Asterisk Intelligence

Summary

This course introduces participants to the many different data warehouses CU*Answers offers. It shows participants how to gain optimal results both 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

16.01 Educating Your Board with Data

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 both how to access credit union financial data and review effectively 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 reviewing data effectively
- Educate credit union employees on organizing data to be digested easily 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

16.02 Introduction to Analytics Booth

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 updated on the latest information about their individual credit unions. 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 both for new and long-time users of Analytics Booth.

Objectives

By the completion of this course, participants will be able to complete the following tasks as related 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

16.03 Expanding the Audience on Data with Analytics Booth

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, this 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 complete the following tasks as related 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

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

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 also both 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

16.05 Report Builder (Query) 2: Building Custom Reports

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 will 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 and 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

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

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 and 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 both well-versed in Report Builder (Query) and 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

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

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 of moving files from CU*BASE to their personal computers.

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

16.08 Microsoft Excel for Credit Unions

1 hour | Scheduled | Asterisk Intelligence

Summary

Microsoft Excel is one of the most important analytical tools in the financial industry. Nearly all credit union staff members 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 compiles, manipulates, or analyzes 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
- Sub-totals
- Calculated fields
- Tables and named ranges
- Simple formulas
- Sum
- Average
- Count
- The IF function
- Incorporating multiple conditions within formulas
- Visual representations of data

16.09 Data Mining: Know Your Member Analysis Tools

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 both is easy and beneficial strategically.

This course show participants how to link products to member needs by using CU*BASE marketing and member analysis tools. Participants will 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.

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

16.10 CU*BASE Management Tools: Leadership Dashboards

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 businesses. Through the investigation of multiple CU*BASE tools, participants will 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 also be helpful for all credit union leaders.

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:
    - NCUA 5300 Call Report Tools
    - Configuration Functions
    - Collections Tools
    - General Ledger Inquiry and Posting Tools
    - Teller and Cash Analysis Tools
    - Lending and Loan Account Tools
    - Know Your Member Analysis Tools
    - Mgmt. Analysis Dashboards and Inquiries
    - Active Beta Development
    - Management Forecasting Tools and Reports
    - Marketing Processing and Analysis Tools
    - File Maintenance Tools and Monitoring

16.11 Hot Topics in Database Management

1 hour | By Request | Asterisk Intelligence

Summary

This course highlights the latest database management tools and solutions 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 most relevant at the time of teaching, exact coverage may include but is not limited to the following:

- Current database management tool set
- Procedures to begin using database management tool set
- 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/UDM)
- Data Exchange (DEX) automated data extraction
- SnapShot library and data time slices

16.12 Getting Started with Unique Data Management (UDM)

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 both 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 all other credit union staff members 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 tool set 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

16.13 Introduction to Visual Analytics Tools (VAT)

1 hour | Scheduled | Asterisk Intelligence

Summary

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

Audience

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

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