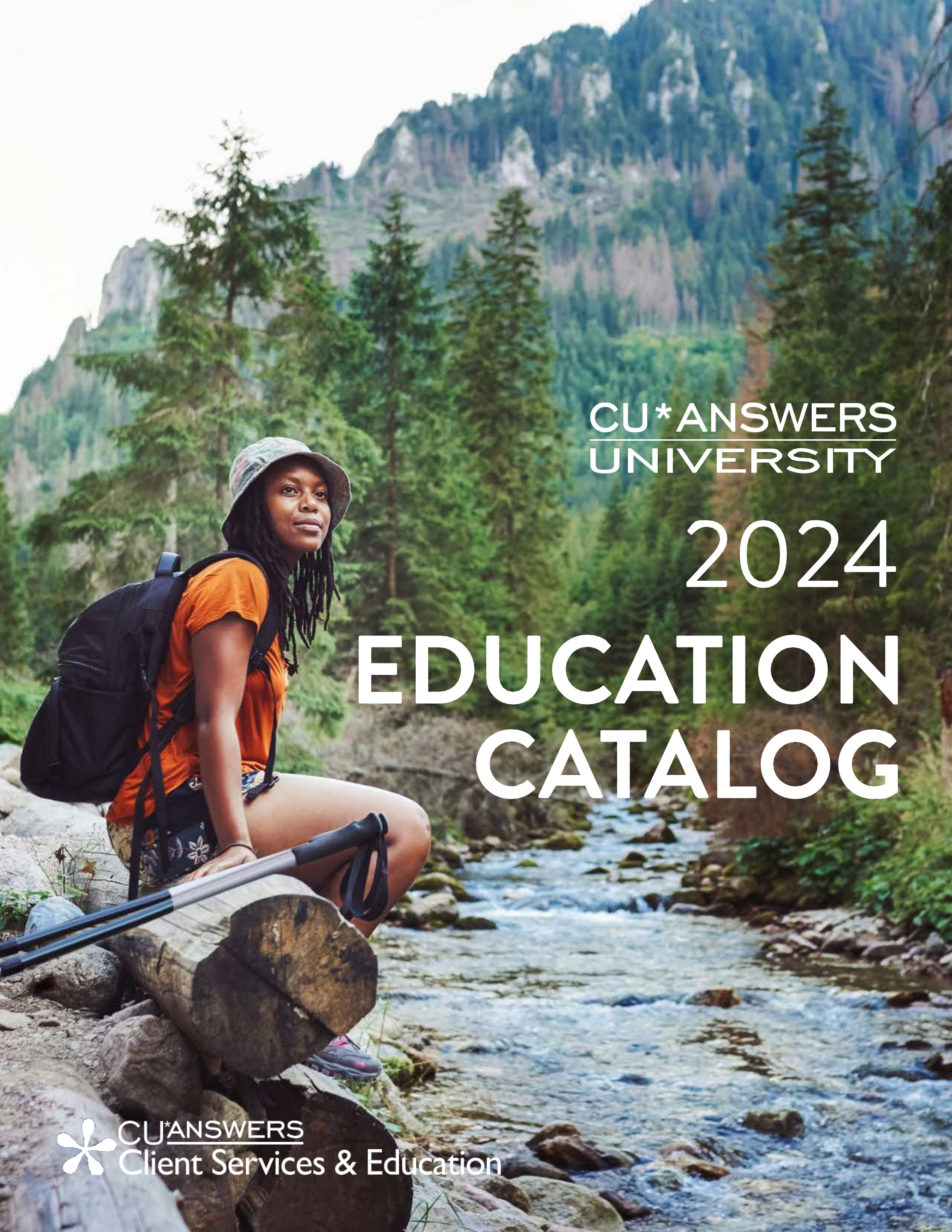


CU*ANSWERS UNIVERSITY

2024

EDUCATION CATALOG

CU*ANSWERS
Client Services & Education

A Note from the VP of Education

Dear Learners,

It is my privilege to present to you your **2024 Education Catalog**, filled with not only classroom and online learning opportunities, but also innumerable resources made available for a variety of learning styles, levels of experience, tenure, and purposes.

The Joy of Education

I started my career at CU*Answers on the Client Service and Education team, and it has been a joy to return to the team in 2023. One of my passions at CU*Answers that we share on this team are the goals of both service and education for new and seasoned users alike. Each year the team works hard to inventory our offerings to find the best fit to continue guiding users into furthering their education. We believe you'll find excellent new courses this year, as well as the common core classes that start fresh users on a strong path to excellence.

Conversations On…

As part of the larger *Conversations On…* initiative, we invite you to join our *Conversations on Education* events as they are scheduled throughout 2024. Our 2023 events focused on our Exercises for Success workbooks and contained interactive material that allowed users to follow along in the Bedrock Community Credit Union, in a collaboration with the related TLC courses and exams. Speaking of courses, watch your TLC Campus for refreshed custom online courses in the upcoming year, with a new look and upgraded functionality.

Spotlight on Online Help

Our dedication to daily, continual learning lives in our many robust online help systems. *CU*BASE Online Help and Tool Documentation*, *Show Me the Steps* (SMTS), *5300 Account Code* online help, and *OPER Online Help* provide immediate and valuable information for daily processes and tasks. Our newest member of the online help family ties it all together: *The Help Hub*. The Help Hub is a resource for resources; this landing hub is a true all-staff effort, and it continues to grow and encapsulate all our resources for users to have at their fingertips.

We look forward to another great year of learning together, sharing knowledge, and helping each other grow.

Sincerely,

Kristian J Daniel

Kristian Daniel
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.
- **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.
- **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 events descriptions.
- **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. Visit the Writing Team Store *https://store.cuanswers.com/product/sign-up-for-cubase-alerts-client-news/* 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 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

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 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. Visit the Writing Team Store *https://store.cuanswers.com/product/sign-up-for-cubase-alerts-client-news/* to be added to this list.

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.

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.

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 https://www.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*.

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

Our newest offering, The Help Hub is your resource for resources. Documentation for tools, functions, processes, and more are categorized for easy research and direction. Visit *https://help.cubase.org/hub/Content/Home.htm* to access this resource.

CU*BASE GOLD Tool Documentation and 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 *https://help.cubase.org/cubase/Welcome.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 (SMTS)
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 *https://help.cubase.org/oper/Content/Welcome.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*.

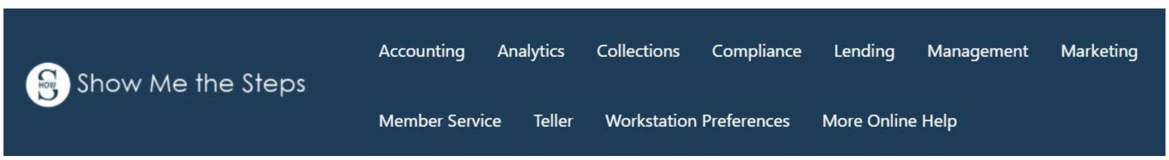
***It's Me 247* How-To Video Series**
This video series is designed for members but is also an excellent resource for new staff unfamiliar with **It's Me 247** Online Banking and the various Online Bill Pay options CU*Answers offers. These videos explain how to perform tasks both in Online Banking and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

OnDemand

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/steps/Content/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 resources/edu/bedrock-community-credit-union 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 four 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 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 20 • May 16 • Sept 11 • Dec 10	*Roundtable Recap Webinars:* • March 5 • May 30 • Sept 25 • Dec 31
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.

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.

Dates	• Summer session: June 17- June 21 • Winter session: Dec 16 - Dec 19
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	Hosted in spring and fall – please watch for email invitations announcing the dates for this event.
Location	Xtend, 2900 Charlevoix Dr SE, Suite 200, 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	Thursday, March 28, 2024, 2:00 PM ET – 4:30 PM ET
Location	In Person & Zoom, Xtend, 2900 Charlevoix Dr SE, Suite 200, Grand Rapids, MI 49546.
Registration	Please watch for an email invitation for further details.

Standard 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 and Phone Operator functions. For a complete list of courses offered in this half-day event, please refer to the Training Schedule.

Dates	• February 16 • June 10	• October 16
Location	Training will be held via webinar.	
Registration	Visit *https://www.cuanswers.com/resources/edu/courses/* to register.	

Xpress 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 and Phone Operator functions. For a complete list of courses offered in this half-day event, please refer to the Training Schedule.

Dates	• April 22 • August 26	• December 11
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.

Dates	• January 17 • March 20 • May 10	• July 12 • September 16 • November 7
Location	Training will be held via webinar.	
Registration	Visit *https://www.cuanswers.com/resources/edu/courses/* to register.	

University Week

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

Dates	• January 22-25 • April 15-19 • July 22-26 • October 7-11
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 Course Catalog | CU*Answers (cuanswers.com)

Xtend 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	Hosted in spring and fall – please watch for email invitations announcing the dates for this event.
Location	Xtend, 2900 Charlevoix Dr SE, Suite 200, 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 14.*

- Courses highlighted in green are monthly featured education events.
- University Week courses are highlighted in beige.
- Lender*VP Week courses are highlighted in blue.

Date	Start Time	End Time	Course/Event Name	Format
January				
1/4	3:30 PM	4:30 PM	8.08 Internal Controls Best Practices	Webinar
1/5	9:30 AM	10:30 AM	4.10 Introduction to CU*BASE Sales and Marketing Tools	Webinar
1/8	3:00 PM	4:00 PM	8.02 Using CU*BASE Tools for Bank Secrecy Act (BSA) Compliance	Webinar
1/9	3:30 PM	4:00 PM	9.65 How to Develop and Test your Business Continuity Plan	Webinar
1/10	10:30 AM	11:30 AM	8.00 Managing Compliance Using CU*BASE	Webinar
1/11	3:00 PM	4:00 PM	9.75 Components of an Information Security Program	Webinar
1/12	3:00 PM	4:00 PM	8.07 Monitoring Abnormal Activity	Webinar
1/15	3:30 PM	4:30 PM	16.10 CU*BASE Management Tools: Leadership Dashboards	Webinar
1/16	3:00 PM	4:00 PM	12.02 Online Credit Cards: Daily Maintenance and Reports	Webinar
1/17	*1:00 PM*	*4:30 PM*	*Member Services Training Day*	*Webinar*
University Week (1/22 to 1/25)				
1/22	*10:30 AM*	*12:00 PM*	*1.01 Member Services: Account Inquiry and Phone Operator*	*Classroom & Webinar*
1/22	*3:00 PM*	*4:00 PM*	*13.05 CU Publisher: Launching the Secure Online Form Generator/Request Center*	*Classroom & Webinar*
1/23	*9:30 AM*	*10:30 AM*	*4.50 Web Accessibility and You*	*Webinar*
1/23	*3:00 PM*	*4:00 PM*	*1.20 Standard Teller Techniques*	*Classroom & Webinar*
1/24	*9:30 AM*	*10:30 AM*	*16.12 Getting Started with Unique Data Management (UDM)*	*Classroom & Webinar*
1/24	*1:00 PM*	*2:00 PM*	*5.85 Participation Loan Servicing: Understanding the Settlement Process*	*Classroom & Webinar*

Date	Start Time	End Time	Course/Event Name	Format
1/24	*4:00 PM*	*5:00 PM*	*16.13 Introduction to Visual Analytics Tools (VAT)*	*Classroom & Webinar*
1/25	*9:30 AM*	*11:00 AM*	*5.10 Lending from Request to Disbursement: Understanding the Application Process*	*Classroom & Webinar*
1/25	*12:00 PM*	*1:00 PM*	*4.12 Member Connect: Building a Communication Network within CU*BASE*	*Classroom & Webinar*
February				
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
2/5	10:00 AM	11:00 AM	4.13 Cross Sales and Sales Trackers: Offering Member Relevant Opportunities	Webinar
2/5	3:00 PM	4:00 PM	5.30 Open-End and Line-of-Credit Lending	Webinar
2/6	9:30 AM	11:00 AM	5.00 Designing CU*BASE Loan Products	Webinar
2/6	2:00 PM	3:00 PM	4.15 Member Service Trackers and Follow-Ups	Webinar
2/7	10:00 AM	11:00 AM	11.02 Working with Your Members Remotely	Webinar
2/9	3:00 PM	4:30 PM	5.40 Managing Bankruptcy	Webinar
2/12	9:30 AM	10:30 AM	1.40 Xpress Teller Techniques	Webinar
2/12	3:30 PM	4:15 PM	12.01 Online Credit Cards: Loan Creation and Card Embossing	Webinar
2/13	3:30 PM	4:30 PM	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*	*Standard Teller Training Day*	*Webinar*
2/22	3:30 PM	4:30 PM	2.00 CU*BASE Employee Security	Webinar
2/28	3:00 PM	4:00 PM	16.14 Analytics Booth – What Every User Should Know	Webinar
March				
3/4	9:30 AM	10:30 AM	13.09 CU Publisher – Launching Mobile Manager, Mobile Alerts, and CU Info	Webinar
3/4	11:00 AM	12:00 PM	13.08 CU Publisher: Launching **It's Me 247** Manager	Webinar
3/5	10:00 AM	11:00 AM	12.03 Online Credit Cards: On the Front Line	Webinar

Date	Start Time	End Time	Course/Event Name	Format
3/5	11:30 AM	12:30 PM	12.02 Online Credit Cards: Daily Maintenance and Reports	Webinar
3/6	3:00 PM	4:30 PM	4.16 Next Suggest Product: Targeted Sales Prompts	Webinar
3/7	3:30 PM	4:30 PM	4.20 Wrap Up Codes: Improving Your Member Phone Interactions	Webinar
3/8	9:30 AM	11:00 AM	5.11 CU*BASE Mortgage Processing	Webinar
3/8	2:00 PM	3:00 PM	13.03 Launching Your CU*Answers Mobile App	Webinar
3/11	3:30 PM	5:00 PM	5.10 Lending from Request to Disbursement: Understanding the Application Process	Webinar
3/12	3:30 PM	5:00 PM	5.12 CU*BASE Escrow Processing	Webinar
3/14	3:30 PM	4:30 PM	4.40 CU*Statements	Webinar
3/15	9:30 AM	11:00 AM	1.01 Member Services: Account Inquiry and Phone Operator	Webinar
3/18	3:30 PM	5:00 PM	5.20 Organizing a Loan Department and Servicing Loans on CU*BASE	Webinar
3/19	3:30 PM	4:30 PM	8.07 Monitoring Abnormal Activity	Webinar
3/20	*1:00 PM*	*4:30 PM*	*Member Service Training Day*	*Webinar*
3/26	3:00 PM	4:00 PM	8.00 Managing Compliance Using CU*BASE	Webinar
3/27	11:00 AM	12:00 PM	4.50 Web Accessibility and You	Webinar
April				
4/2	3:30 PM	4:30 PM	4.12 Member Connect: Building a Communication Network within CU*BASE	Webinar
4/3	9:30 AM	10:30 AM	8.08 Internal Controls Best Practices	Webinar
4/4	4:00 PM	4:30 PM	9.65 How to Develop and Test your Business Continuity Plan	Webinar
4/5	10:00 AM	11:00 AM	11.02 Working with Your Members Remotely	Webinar
4/5	3:00 PM	4:00 PM	16.08 Microsoft Excel for Credit Unions	Webinar
4/8	3:00 PM	4:30 PM	5.50 Interactive Online Collections	Webinar
4/9	3:00 PM	4:00 PM	5.70 Centralized Underwriting: Inquiry for Loans in Process	Webinar
4/10	3:00 PM	4:00 PM	5.86 Secondary Market Loan Servicing: Understanding the Settlement Process	Webinar
4/11	3:30 PM	4:30 PM	4.15 Member Services Trackers, Leads, and Follow-ups	Webinar

Date	Start Time	End Time	Course/Event Name	Format
University Week (4/15 to 4/19)				
4/15	*3:30 PM*	*4:30 PM*	*13.05 CU Publisher: Launching the Secure Online Form Generator/Request Center*	*Classroom & Webinar*
4/16	*2:30 PM*	*3:30 PM*	*16.12 Getting Started with Unique Data Management (UDM)*	*Classroom & Webinar*
4/17	*9:30 AM*	*10:15 AM*	*12.01 Online Credit Cards: Loan Creation and Card Embossing*	*Classroom & Webinar*
4/18	*9:30 AM*	*10:30 AM*	*4.20 Wrap Up Codes: Improving Your Member Phone Interactions*	*Webinar*
4/22	*1:00 PM*	*5:00 PM*	*Xpress Teller Training Day*	*Webinar*
4/23	3:30 PM	4:30 PM	4.40 CU*Statements	Webinar
4/24	3:00 PM	4:00 PM	1.20 Standard Teller Techniques	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
5/3	10:00 AM	11:00 AM	16.12 Getting Started with Unique Data Management (UDM)	Webinar
5/3	3:30 PM	4:30 PM	16.14 Analytics Booth – What Every User Should Know	Webinar
5/6	3:30 PM	4:30 PM	13.02 MAP/MOP – Applying for Membership Online	Webinar
5/9	10:00 AM	11:00 AM	4.20 Wrap-Up Codes: Improving Your Member Phone Interactions	Webinar
5/9	3:30 PM	4:30 PM	8.09 Vendor Management 101	Webinar
5/10	*1:00 PM*	*4:30 PM*	*Member Services Training Day*	*Webinar*
5/14	9:30 AM	10:30 AM	4.13 Cross Sales and Sales Trackers: Offering Member Relevant Opportunities	Webinar
5/14	3:30 PM	4:00 PM	9.70 Preparing for a Cybersecurity Incident Response	Webinar
5/16	3:30 PM	4:30 PM	4.15 Member Service Trackers, Leads and Follow-ups	Webinar
5/17	9:30 AM	10:30 AM	4.10 Introduction to CU*BASE Sales and Marketing Tools	Webinar
5/21	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
5/29	3:00 PM	3:30 PM	Analytics Booth – What Every User Should Know	Webinar

Date	Start Time	End Time	Course/Event Name	Format
June				
6/3	3:30 PM	4:30 PM	1.40 Xpress Teller Techniques	Webinar
6/4	9:30 AM	10:30 AM	4.50 Web Accessibility and You	Webinar
6/5	3:30 PM	4:30 PM	1.30 Head Teller Vault and Change Fund Management	Webinar
6/6	9:30 AM	11:00 AM	1.01 Member Services: Account Inquiry and Phone Operator	Webinar
6/6	3:30 PM	4:30 PM	2.00 CU*BASE Employee Security	Webinar
6/7	10:00 AM	11:00 AM	13.09 CU Publisher: Launching Mobile Manager, Mobile Alerts, and CU Info	Webinar
6/7	1:30 PM	2:30 PM	13.08 CU Publisher: Launching **It's Me 247** Manager	Webinar
6/10	10:00 AM	11:00 AM	8.02 Using CU*BASE Tools for Bank Secrecy Act (BSA) Compliance	Webinar
6/10	*1:00 PM*	*5:00 PM*	*Standard Teller Training Day*	*Webinar*
6/11	2:00 PM	3:30 PM	4.16 Next Suggested Product: Targeted Sales Prompts	Webinar
6/12	3:30 PM	4:30 PM	8.00 Managing Compliance Using CU*BASE	Webinar
Lender*VP Week (6/17 to 6/21)				
6/17	*9:30 AM*	*11:00 AM*	*5.00 Designing CU*BASE Loan Products*	*Webinar*
6/17	*11:30 AM*	*1:00 PM*	*5.10 Lending from Request to Disbursement: Understanding the Application Process*	*Webinar*
6/17	*2:30 PM*	*4:00 PM*	*5.11 CU*BASE Mortgage Processing*	*Webinar*
6/18	*9:30 AM*	*11:00 AM*	*5.12 CU*BASE Escrow Processing*	*Webinar*
6/18	*11:30 AM*	*12:30 PM*	*5.30 Open-End and Line-of-Credit Lending*	*Webinar*
6/18	*2:30 PM*	*4:00 PM*	*5.20 Organizing a Loan Department and Servicing Loans on CU*BASE*	*Webinar*
6/19	*9:30 AM*	*11:00 AM*	*5.40 Managing Bankruptcy*	*Webinar*
6/19	*11:30 AM*	*12:00 PM*	*5.70 Centralized Underwriting: Inquiry for Loans in Process*	*Webinar*
6/19	*2:30 PM*	*4:00 PM*	*5.50 Interactive Online Collections*	*Webinar*
6/20	*11:00 AM*	*12:00 PM*	*5.76 Managing Delivery Channels*	*Webinar*
6/27	*2:30 PM*	*4:00 PM*	*5.79 Real Estate Solutions*	*Webinar*

Date	Start Time	End Time	Course/Event Name	Format
July				
7/9	10:00 AM	11:00 AM	13.02 MAP/MOP – Applying for Membership Online	Webinar
7/11	10:30 AM	11:30 AM	16.08 Microsoft Excel for Credit Unions	Webinar
7/12	*1:00 PM*	*4:30 PM*	*Member Services Training Day*	*Webinar*
University Week (7/22 to 7/26)				
7/22	*9:30 AM*	*10:30 AM*	*16.12 Getting Started with Unique Data Management (UDM)*	*Classroom & Webinar*
7/22	*11:00 AM*	*12:00 PM*	*4.50 Web Accessibility and You*	*Webinar*
7/23	*2:30 PM*	*3:00 PM*	*9.65 How to Develop and Test your Business Continuity Plan*	*Classroom & Webinar*
7/23	*3:30 PM*	*4:30 PM*	*12.02 Online Credit Cards: Daily Maintenance/Reports*	*Classroom & Webinar*
7/24	*10:30 AM*	*11:30 AM*	*8.07 Monitoring Abnormal Activity*	*Classroom & Webinar*
7/24	*2:00 PM*	*3:00 PM*	*5.86 Secondary Market Loan Servicing: Understanding the Settlement Process*	*Webinar*
7/24	*3:30 PM*	*4:30 PM*	*13.05 CU Publisher: Launching the Secure Online Form Generator/Request Center*	*Classroom & Webinar*
7/25	*10:00 AM*	*11:00 AM*	*13.03 Launching Your CU*Answers Mobile App*	*Webinar*
August				
8/2	3:00 PM	4:00 PM	8.09 Vendor Management 101	Webinar
8/6	9:30 AM	10:30 AM	11.02 Working with Your Members Remotely	Webinar
8/13	3:30 PM	4:30 PM	9.75 Components of an Information Security Program	Webinar
8/15	9:30 AM	10:30 AM	16.13 Introduction to Visual Analytics Tools (VAT)	Webinar
8/20	3:30 PM	4:30 PM	8.08 Internal Controls Best Practices	Webinar
8/21	3:15 PM	4:00 PM	12.01 Online Credit Cards: Loan Creation and Card Embossing	Webinar
8/22	3:30 PM	4:30 PM	12.03 Online Credit Cards: On the Front Line	Webinar
8/26	*1:00 PM*	*5:00 PM*	*Xpress Teller Training Day*	*Webinar*
8/27	3:00 PM	4:00 PM	4.50 Web Accessibility and You	Webinar
8/28	3:00 PM	3:30 PM	Analytics Booth – What Every User Should Know	Webinar

Date	Start Time	End Time	Course/Event Name	Format
September				
9/3	3:00 PM	4:00 PM	8.07 Monitoring Abnormal Activity	Webinar
9/4	3:00 PM	4:30 PM	5.10 Lending from Request to Disbursement: Understanding the Application Process	Webinar
9/5	3:30 PM	4:30 PM	13.02 MAP/MOP – Applying for Membership Online	Webinar
9/6	10:30 AM	11:30 AM	4.15 Member Service Trackers and Follow-Ups	Webinar
9/9	10:00 AM	10:30 AM	9.60 Unpacking the CU*Answers High-Availability (HA) Rollover Exercise	Webinar
9/10	3:30 PM	4:30 PM	4.40 CU*Statements	Webinar
9/12	9:30 AM	10:00 AM	9.70 Preparing for a Cybersecurity Incident Response	Webinar
9/13	3:30 PM	4:30 PM	5.85 Participation Loan Servicing: Understanding the Settlement Process	Webinar
9/16	*1:00 PM*	*4:30 PM*	*Member Services Training Day*	*Webinar*
9/17	3:30 PM	4:30 PM	4.12 Member Connect: Building a Communication Network within CU*BASE	Webinar
9/19	3:30 PM	4:30 PM	1.40 Xpress Teller Techniques	Webinar
9/23	3:00 PM	4:30 PM	5.11 CU*BASE Mortgage Processing	Webinar
9/24	10:00 AM	11:00 AM	13.09 CU Publisher: Launching Mobile Manager, Mobile Alerts, and CU Info	Webinar
9/26	10:00 AM	11:00 AM	13.08 CU Publisher: Launching **It's Me 247** Manager	Webinar
October				
10/2	9:30 AM	10:30 AM	13.03 Launching Your CU*Answers Mobile App	Webinar
10/2	*3:00 PM*	*4:30 PM*	5.00 Designing CU*BASE Loan Products	Webinar
University Week (10/7 to 10/11)				
10/7	*1:30 PM*	*2:30 PM*	*8.02 Using CU*BASE Tools for Bank Secrecy Act (BSA) Compliance*	*Webinar*
10/7	*3:00 PM*	*4:00 PM*	*12.03 Online Credit Cards: On the Front Line*	*Classroom & Webinar*
10/8	*9:30 AM*	*10:30 AM*	*1.20 Standard Teller Techniques*	*Classroom & Webinar*
10/8	*1:30 PM*	*2:30 PM*	*16.12 Getting Started with Unique Date Management (UDM)*	*Classroom & Webinar*
10/8	*3:30 PM*	*4:30 PM*	*4.40 CU*Statements*	*Classroom & Webinar*

Date	Start Time	End Time	Course/Event Name	Format
10/9	*9:30 AM*	*10:00 AM*	*9.60 Unpacking the CU*Answers High-Availability (HA) Rollover Exercise*	*Webinar*
10/9	*1:00 PM*	*2:00 PM*	*16.08 Microsoft Excel for Credit Unions*	*Classroom & Webinar*
10/9	*2:30 PM*	*3:30 PM*	*13.05 CU Publisher: Launching the Secure Online Form Generator/Request Center*	*Classroom & Webinar*
10/10	*9:30 AM*	*10:30 AM*	*8.08 Internal Controls Best Practices*	*Classroom & Webinar*
10/10	*2:00 PM*	*3:30 PM*	*4.16 Next Suggested Product: Targeted Sales Prompts*	*Classroom & Webinar*
10/14	9:30 AM	11:00 AM	5.40 Managing Bankruptcy	Webinar
10/14	3:00 PM	4:00 PM	4.20 Wrap-Up Codes: Improving Your Member Phone Interactions	Webinar
10/15	10:15 AM	11:00 AM	12.01 Online Credit Cards: Loan Creation and Card Embossing	Webinar
10/16	*1:00 PM*	*5:00 PM*	*Standard Teller Training Day*	*Webinar*
10/22	3:30 PM	4:30 PM	2.00 CU*BASE Employee Security	Webinar
10/23	3:30 PM	4:30 PM	16.10 CU*BASE Management Tools: Leadership Dashboards	Webinar
10/24	10:00 AM	11:00 AM	4.15 Member Service Trackers, Leads and Follow-ups	Webinar
10/29	3:30 PM	4:30 PM	4.20 Wrap Up Codes: Improving Your Member Phone Interactions	Webinar
November				
11/4	3:30 PM	4:30 PM	16.12 Getting Started with Unique Data Management (UDM)	Webinar
11/5	3:00 PM	4:00 PM	11.02 Working with Your Members Remotely	Webinar
11/6	3:30 PM	4:30 PM	8.07 Monitoring Abnormal Activity	Webinar
11/7	*1:00 PM*	*4:30 PM*	*Member Services Training Day*	*Webinar*
11/8	*9:30 AM*	*10:30 AM*	*12.02 Online Credit Cards: Daily Maintenance and Reports*	*Webinar*
11/11	*3:30 PM*	*4:30 PM*	*8.09 Vendor Management 101*	*Webinar*
11/13	*3:00 PM*	*4:30 PM*	*1.01 Member Services: Account Inquiry and Phone Operator*	*Webinar*
11/14	10:00 AM	11:00 AM	*8.00 Managing Compliance Using CU*BASE*	*Webinar*
11/19	4:00 PM	5:00 PM	9.75 Components of an Information Security Program	Webinar
11/20	3:30 PM	4:00 PM	9.65 How to Develop and Test your Business Continuity Plan	Webinar

Date	Start Time	End Time	Course/Event Name	Format
December				
12/3	3:30 PM	4:30 PM	4.12 Member Connect: Building a Communication Network within CU*BASE	Webinar
12/10	3:00 PM	4:00 PM	8.02 Using CU*BASE Tools for Bank Secrecy Act (BSA) Compliance	Webinar
12/11	*1:00 PM*	*5:00 PM*	*Xpress Teller Training Day*	*Webinar*
Lender*VP Week (12/16 to 12/19)				
12/16	*9:30 AM*	*11:00 AM*	*5.00 Designing CU*BASE Loan Products*	*Webinar*
12/16	*11:30 AM*	*1:00 PM*	*5.10 Lending from Request to Disbursement: Understanding the Application Process*	*Webinar*
12/16	*2:30 PM*	*4:00 PM*	*5.11 CU*BASE Mortgage Processing*	*Webinar*
12/17	*9:30 AM*	*11:00 AM*	*5.12 CU*BASE Escrow Processing*	*Webinar*
12/17	*11:30 AM*	*12:30 PM*	*5.30 Open-End and Line-of-Credit Lending*	*Webinar*
12/17	*2:30 PM*	*4:00 PM*	*5.20 Organizing a Loan Department and Servicing Loans on CU*BASE*	*Webinar*
12/18	*9:30 AM*	*11:00 AM*	*5.40 Managing Bankruptcy*	*Webinar*
12/18	*11:30 AM*	*12:30 PM*	*5.70 Centralized Underwriting: Inquiry for Loans in Process*	*Webinar*
12/18	*2:30 PM*	*4:00 PM*	*5.50 Interactive Online Collections*	*Webinar*
12/19	*11:00 AM*	*12:00 PM*	*5.76 Managing Delivery Channels*	*Webinar*
12/19	*2:30 PM*	*4:00 PM*	*5.79 Real Estate Solutions*	*Webinar*
12/23	10:30 AM	11:30 AM	5.86 Secondary-Market Loan Servicing: Understanding the Settlement Process	Webinar
12/23	2:00 PM	3:00 PM	16.13 Introduction to Visual Analytics Tools (VAT)	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:

Client Services and Education

Taught by the Client Services & Education team, courses in the Teller/Member Service category are geared toward all credit union staff and cover a variety of teller and member service topics, such as the basics of how to use CU*BASE as well as CU*BASE share, Share Drafts, certificate, IRA, and loan products.

Courses at a Glance

1.01	Member Services: Account Inquiry and Phone Operator
1.20	Standard Teller Techniques
1.30	Head Teller Vault/Change Fund Management
1.40	Xpress Teller Techniques
2.00	CU*BASE Employee Security
3.95	Year-End Planning for All Credit Unions
4.40	CU*Statements
4.50	Web Accessibility and You

1.01 Member Services: Account Inquiry and Phone Operator

1.5 hours | Client Services and Education

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 Standard Teller Techniques

1 hour | Client Services and Education

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
- 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
- Understanding the teller's role in the credit union communication chain
- Online CTR forms

1.30 Head Teller Vault/Change Fund Management

1 hour | Client Services and Education

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 Xpress Teller Techniques

1 hour | Client Services and Education

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.

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
- 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
- Understanding the teller's role in the credit union communication chain
- Online CTR form

2.00 CU*BASE Employee Security

1 hour — Client Services and Education

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

3.95 Year-End Planning for All Credit Unions

1 hour | Client Services and Education

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

4.40 CU*Statements

1 hour | Client Services and Education

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 | 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

Sales and Marketing

Taught by the Xtend Communications & Data Analytics team, courses in this category introduce credit union staff to Sales and Marketing tools within CU*BASE that support member communications, service and sales tracking, and more. These courses include CU*BASE tools such as Member Connect, the Tracker system for member services and sales, Cross sales and sales tracking, Next Suggested Product, and Wrap Up Codes.

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 Member Relevant Opportunities
4.15	Member Service Trackers, Leads, and Follow-ups
4.16	Next Suggested Product: Targeted Sales Prompts
4.20	Wrap Up Codes: Improving Your Member Phone Interactions

4.10 Introduction to CU*BASE Sales & Marketing Strategies

1 hour | 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 locate and use CU*BASE Dashboards that effectively support marketing strategies
- Explain how to use the List Generator tool to create marketing lists for various marketing channels
- Explain how to connect the lists created in other CU*BASE tools such as List Generator and Dashboards within CU*BASE marketing tools

Topics

This course covers the following topics:

- How to identify marketing opportunities in CU*BASE analytical tools
- How to obtain a target audience via CU*BASE Dashboard exports
- How to create a target audience list via the List Generator tool for multiple marketing channels
- How to append member email addresses to Dashboard exports
- How to locate CU*BASE Dashboards and Marketing Tools

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

1 hour 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 even statement insert configurations.

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

4.13 Cross Sales & Sales Trackers: Offering Members Relevant Opportunities

1.5 hours | 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. A pre-requisite understanding the tracker system for member service usage may be beneficial.

Objectives

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

- Explain how CU*BASE Sales Trackers complement the overall member relationship, and the difference between service trackers and sales
- Explain the difference between cross-sales need groups and tasks within the Sales Tracker system
- Utilize cross-sales tools to track sales opportunities for specific members
- 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
- Understanding how to pull supervisory reports and/or sales tracker analysis details.

4.15 Member Service Trackers, Leads, and Follow-Ups

1 hour | Sales & Marketing

Summary

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

Audience

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

Objectives

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

- Explain the structure and configuration options of the CU*BASE Tracker system
- Identify best practices for documenting Tracker entries
- Use Sales and Service Trackers to assign internal follow-ups, either to self or referral to another individual or department.

Topics

This course covers the following topics:

- Understanding the variety of uses for and benefits of Trackers
- Configuring Tracker types and memo codes
- Working Trackers from Account Inquiry
- Working Trackers from a follow-up
- Scheduling a follow-up
- Activity tracking and supervisory reports

4.16 Next Suggested Product – Targeted Sales Prompts

1.5 hours | 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 opportunities or news that is most relevant to each individual member.

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

Note: Implementation of a Next Suggested Product routine works best with existing knowledge of Trackers and the Sales Tracker system.

Audience

This class is designed for credit union 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

4.20 Wrap Up Codes: Improving Your Member Phone Interactions

1 hour | Sales & Marketing

Summary

Uncover the reasons your members call and dive deep into better understanding the members that 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 every single phone interaction.

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 be able to:

- Discuss the purpose and function of CU*BASE Wrap Up Codes
- Explore how Wrap Up Codes enhance knowledge of your membership and improve operations
- Investigate the use of 1-Click Trackers

Topics

This course covers the following topics:

- 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***

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

3.15	Advanced General Ledger
3.20	Balancing Made Easy
3.40	Credit Union Financials: Configuration, Printing, and Other Options

3.15 Advanced General Ledger

1 hour | Earnings Edge

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?

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	Earnings Edge

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

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

1.5 hours Earnings Edge

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

Lender*VP

Taught by the Sales & Services 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
5.76	Managing Delivery Channels
5.79	Real Estate Solutions
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 | 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 | 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 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 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)

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

1.5 hours | 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 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 | 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 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 | 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

5.76 Managing Delivery Channels

1 hour | 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 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

5.85 Participation Loan Servicing: Understanding the Settlement Process

1 hour | 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 | 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

Enterprise Risk Management

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

Courses at a Glance

8.00	Managing Compliance Using CU*BASE
8.02	Using CU*BASE Tools for Bank Secrecy Act (BSA) Compliance
8.07	Monitoring Abnormal Activity
8.08	Internal Controls Best Practices
8.09	Vendor Management 101

8.00 Managing Compliance Using CU*BASE

1 hour | 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 | 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

8.07 Monitoring Abnormal Activity

1 hour | 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 | 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 | 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.

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 | 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 | 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 | 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 | 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

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

11.02	Working with Your Members Remotely

11.02 Working with Your Members Remotely

1 hour | 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

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.

Courses at a Glance

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

12.01 Online Credit Cards: Loan Creation and Card Embossing

45 minutes | 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 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 | 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

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.

Courses at a Glance

13.02	MAP and MOP: Applying for Membership Online
13.03	Launching Your CU*Answers Mobile App
13.05	CU Publisher: Launching the Secure Online Form Generator/Request Center
13.08	CU Publisher: Launching **It's Me 247** Manager ★
13.09	CU Publisher: Launching Mobile Manager, Mobile Alerts, and CU Info ★

13.02 MAP and MOP: Applying for Membership Online

1 hour 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
- License Verification Process

13.03 Launching Your CU*Answers Mobile App

1 hour 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

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

1 hour 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

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

1.5 hours | 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 | 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

Human Resources

HUMAN RESOURCES
SUCCESS THROUGH PEOPLE

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

Courses at a Glance

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

Special Note

Formerly known as the Organizational Resource Development (ORD) team, our rebranded Human Resources team are hard at work refreshing and revamping the above listed courses during the 2024 education year. Please pardon our dust!

15.01 Providing First-Class Customer Service to Members

1 hour HR

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 HR

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 HR

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 HR

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 HR

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

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

16.04	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
16.08	Microsoft Excel for Credit Unions
16.10	CU*BASE Management Tools: Leadership Dashboards
16.12	Getting Started with Unique Data Management (UDM)
16.13	Introduction to Visual Analytics Tools (VAT)
16.14	Analytics Booth – What Every User Should Know

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

1.5 hours | 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 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 | 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

16.08 Microsoft Excel for Credit Unions

1 hour | 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

16.10 CU*BASE Management Tools: Leadership Dashboards

1 hour | 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

16.12 Getting Started with Unique Data Management (UDM)

1 hour | 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 | 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

16.14 Analytics Booth – What Every User Should Know

1 hour | Asterisk Intelligence

Summary

Analytics Booth provides credit union executives and managers an opportunity to showcase the things you are doing right! Credit unions boast that processes that use spreadsheets, like Excel, can be optimized through the application of Analytics Booth. Analytics Booth can be used to solve issues across a myriad of different complexities, like sinking revenues, inefficient method of capturing and sharing information, fraud reporting, poor KPI management, measuring campaign effectiveness and more.

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:

- A thorough understanding of how to use Analytics Booth for their business.
- Learned about how to receive information on demand using Trends, Alerts and Dashboards
- Identify the dependencies between CU*BASE and Analytics Booth. In addition, understand how they are different.

Topics Covered

This course covers the following topics:

- What is Analytics Booth
- Trends, Alerts and Dashboards
- The CU*BASE Component
- Making Analytics Booth Uniquely Yours