CU*Forms

Find this booklet online: open.cuanswers.com/cubase-reference

Revised: January 23, 2025

Creating general forms and getting them signed is easier than ever with CU*Forms, accessed directly from CU*BASE.

CU*Forms is a web application that allows credit unions to build their very own membership form templates, which staff can use to prepare documents for signing. Once documents are prepared, members may sign with Topaz signature pads and/or eDOCSignature eSign. Clients have access to over 250 CU*BASE data points for general membership data like account base/number, SSN, first name, last name, and address to automatically fill forms. You can also manually upload and index forms for archival.

You can even add your own fields and signature fields, so you can have the forms signed by the member. Additionally, you can send out the forms to be signed remotely.

With an additionally configured component, you can also automate the presentation of these forms when opening accounts and printing miscellaneous account forms. Checklists, communication, and auditing tools round out "FormFLOW" in CU*Forms.

Want to order CU*Forms for your credit union? Visit our online store https://store.cuanswers.com/product/cuforms/ to get started.

CU*ANSWERS
A Credit Union Service Organization

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Getting Started

Learn More About CU*Forms

Get Started by Signing Up on the Online Store

To get started with CU*Forms, sign up via the CU*Answers online store page: https://store.cuanswers.com/product/cuforms/.

Check out the Quick-Guide Video Library

There are several video shorts to get you familiar with the features of CU*Forms on the store page. Check out the link above to learn more about CU*Forms.

On the store page, you will find the following demos:

- How to use and sign a form
- How to build a template

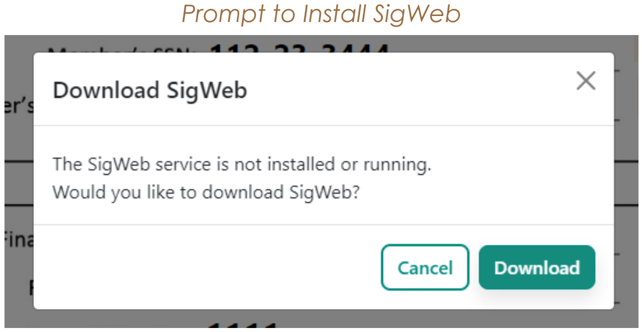
Over 150 Data Fields Populated from CU*BASE to Form Listing

CU*Forms allows you to pull data directly from CU*BASE into your form according to the pre-programmed field on the form. For example, you might pull in the member's or joint owner's address or social security number.

SigWeb Installation

You can configure forms to allow the member to sign them on a Topaz signature pad. This will require a software driver to be installed on your computer called SigWeb, a third-party application that allows the user to connect their Topaz signature pad to the form to apply signatures. If you do not have SigWeb installed when you go to sign a document, you will receive the following error message.

Prompt to Install SigWeb



Simply select the download button to download and install SigWeb. This software installation requires administrative permissions.

Access CU*Forms

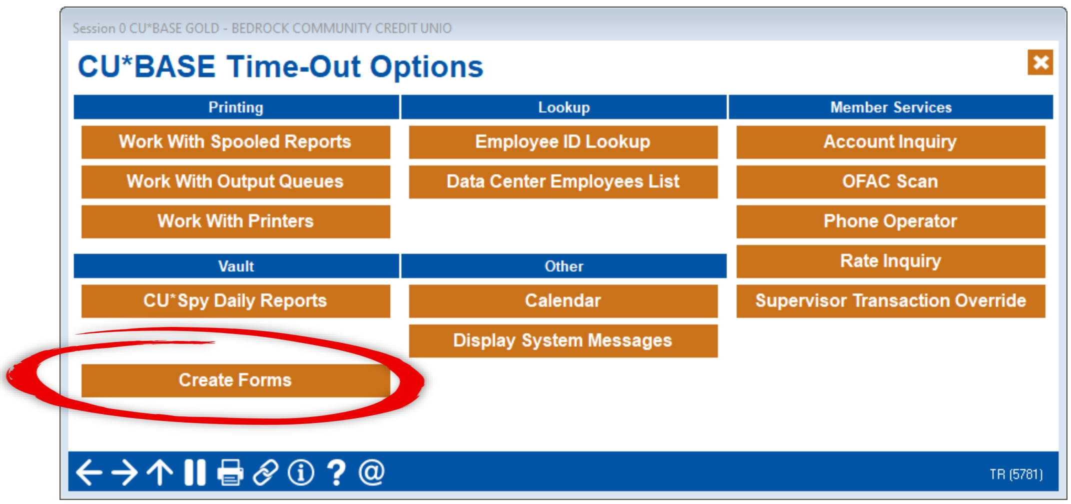
Getting into the Software

Depending on the reason you are using CU*Forms, you may access it from one of three locations.

Access CU*Forms from the Time-Out Window

One easy way to access CU*Forms is to click the *Create Forms* button on the CU*BASE Time-Out Window. Access the Time-Out Window by clicking the Escape key from the from any CU*BASE screen.

*Access CU*Forms from the Time-Out Window*

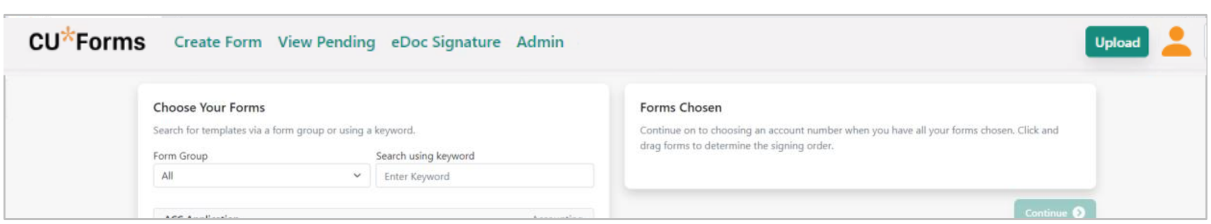


▷ If you are not set up with CU*Forms, you will be redirected to the store page to sign up for the feature.

Once you click *Create Forms*, a web browser will open allowing you to add new templates and populate existing ones. What you see on this page depends on your permissions.

▷ Below is an example of a user with all permissions granted.

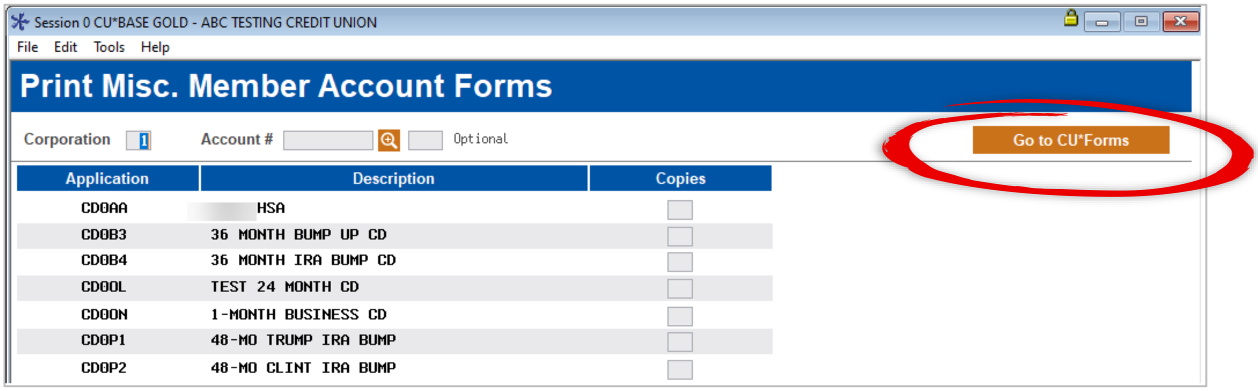
Permissions for a Admin User - All Access Granted



At the start, this page will be blank, with no forms or templates available.

Access CU*Forms When Printing Miscellaneous Account Forms

CU*Forms can also be accessed from the screen where you print miscellaneous account forms by clicking *Go to CU*Forms*. The access to CU*Forms is the same as the Time-Out Window in the previous section.

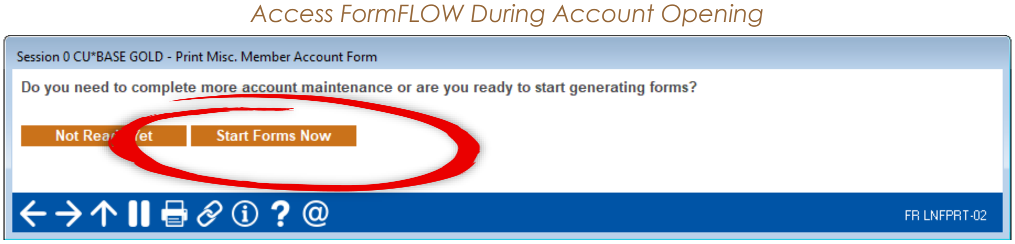


Access FormFLOW When Opening Sub Accounts

This feature requires separate activation. Contact the Imaging team for assistance.

This access point appears during the sub account opening process (via **Tool #3 *Open/Maintain Memberships/Accounts***). When it is time to print the forms for the account, CU*BASE will present the following window.

Access FormFLOW During Account Opening

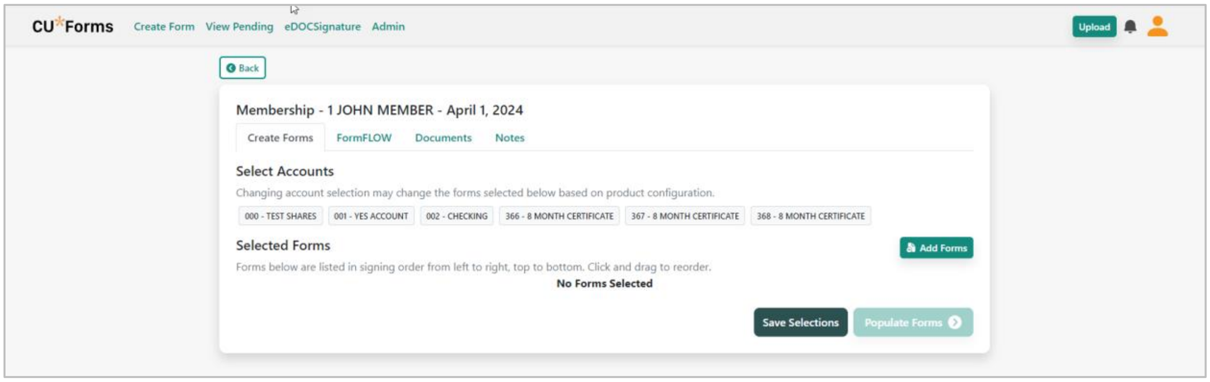


At this point, you click *Start Forms Now* to access FormFLOW, which will walk you through signing and printing all the forms associated with the sub account.

- ▷ If you need to open an additional sub account, click *Not Ready Yet* to return to the account opening process. After all accounts are opened, click *Start Forms Now*, and the forms for all sub accounts will be presented sequentially.

You then enter the FormFLOW entry tab.

FormFLOW Entry Area



▷ Refer to page 52 for step-by-step instructions for using FormFLOW during the account opening process. (This feature requires configuration, which is covered starting on page 40.)

Select Forms/Import Data

And Send to Member

This section of the booklet covers selecting a pre-programmed form in CU*Forms and importing member data. It also covers signing the form, sending it out for signature, saving, and printing the form.

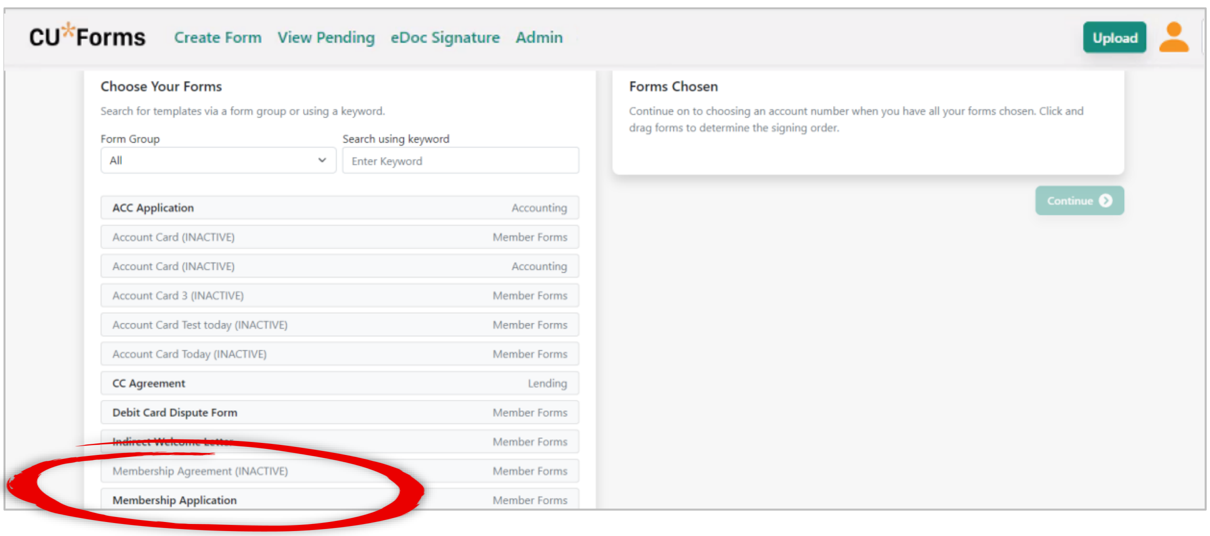
▷ For information on creating a template, refer to the next section "Building a Template" on page 16.

▷ For information on adding the form to the pending area, see page 30.

Select a Form

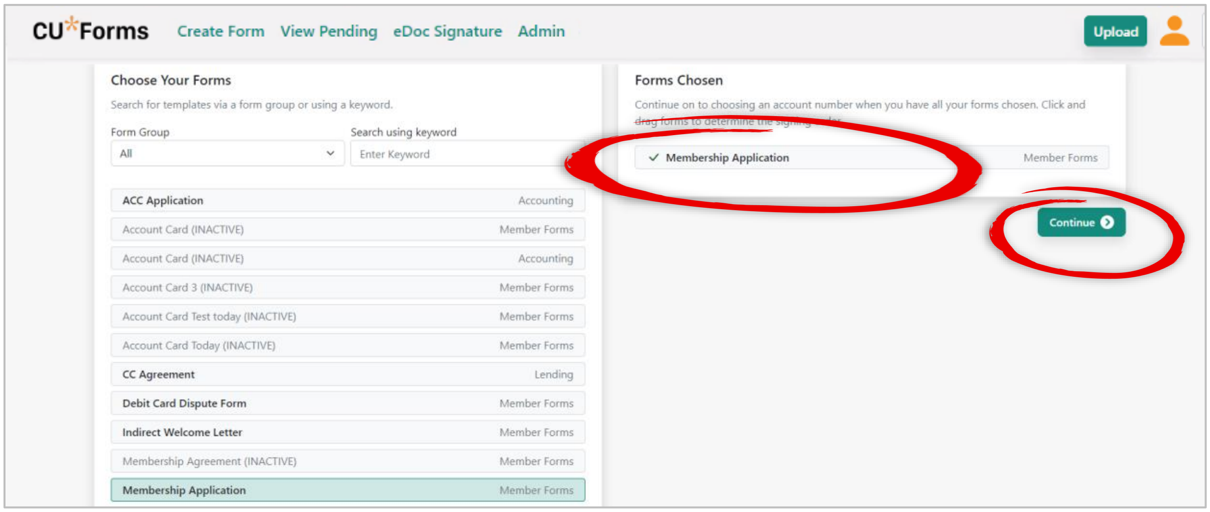
The entry screen lists the categories of forms available in CU*Forms. Any marked as Inactive are unavailable. (Inactive forms are drafts.)

Select Active Form



To select a form, click on it from the list on the left, and it will appear in the "Forms Chosen" list on the right.

Select Form



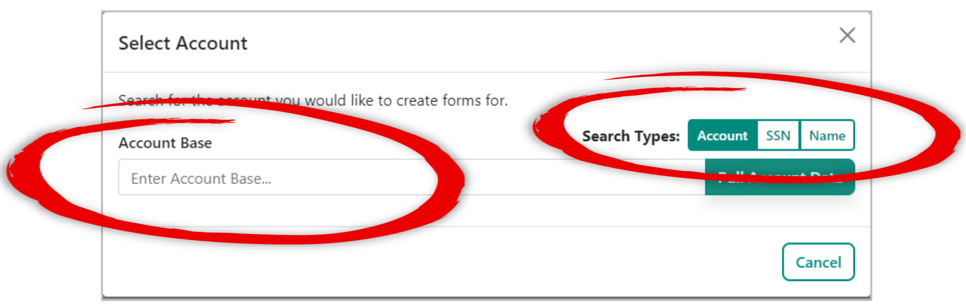
Click *Continue*.

Complete Form and Import Member Data

If the form has been programmed to accept CU*BASE data, the system will ask for the member information, so you can designate which membership's data will be populated on the form.

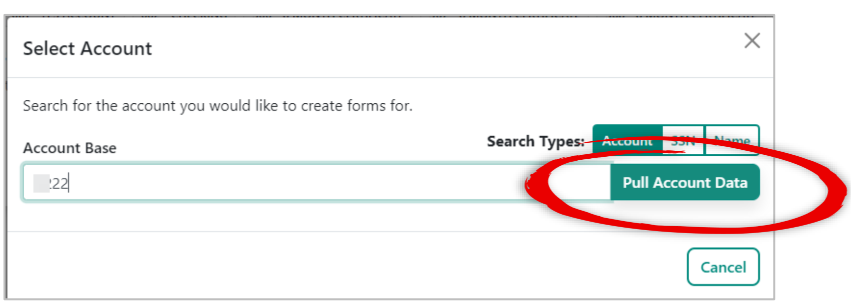
You can use any of the following by changing the *Search Types* selection: account number, social security number, or name. (If you select name, first and last name fields will appear.)

Enter Member Information to Populate Form



Enter your member data.

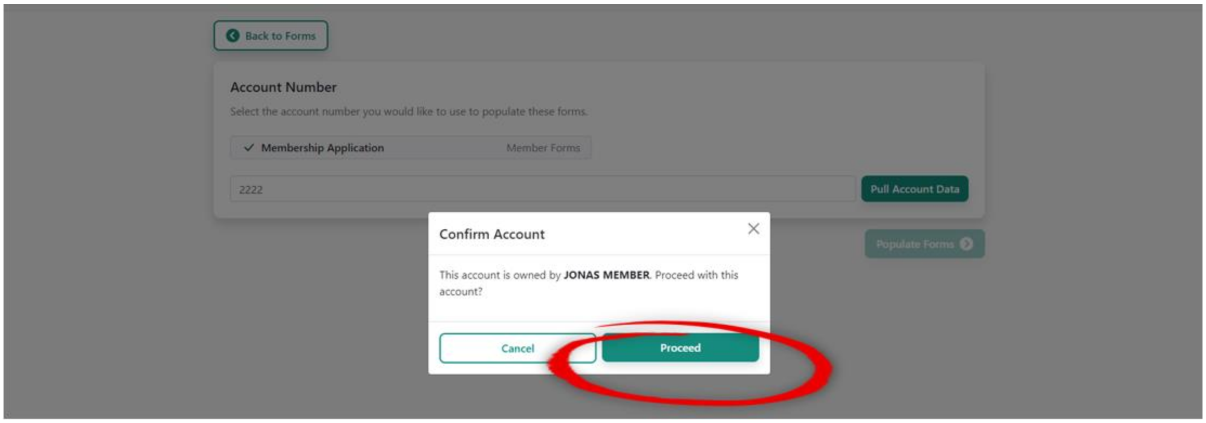
Pull Data into Form



Click *Pull Account Data*.

A confirmation window will appear showing the member.

Confirm Member

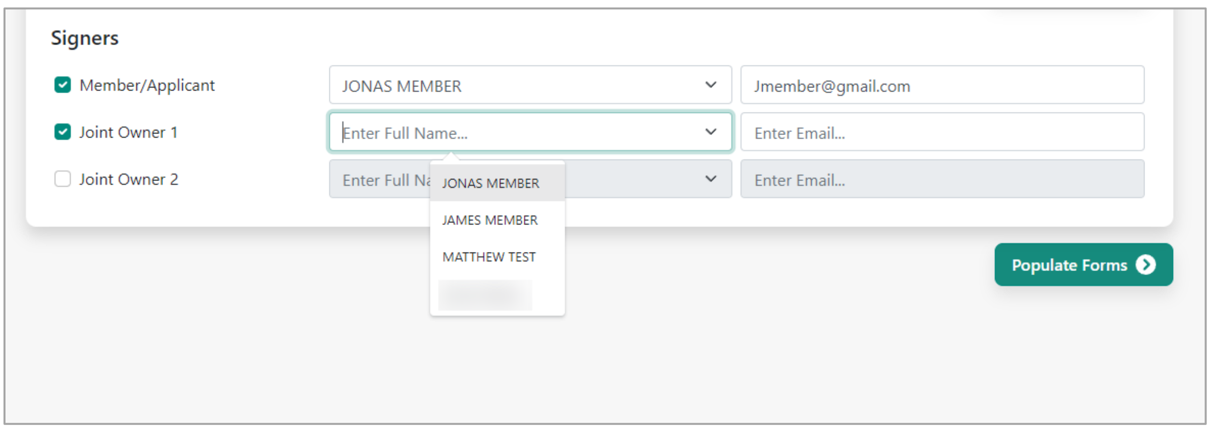


Confirm the correct member was selected by clicking *Proceed*.

A screen will appear listing the member's email address on file. This screen also allows you to elect to pull joint owner data as well. If the form is programmed to include these people's data, they will also be included in the form.

To add one or more joint owners, check the box and select the name from the drop-down menu. (The names that appear on the list are joint owners on the membership in CU*BASE.)

Add Joint Owners by Checking the Box and Selecting from the Drop-down List

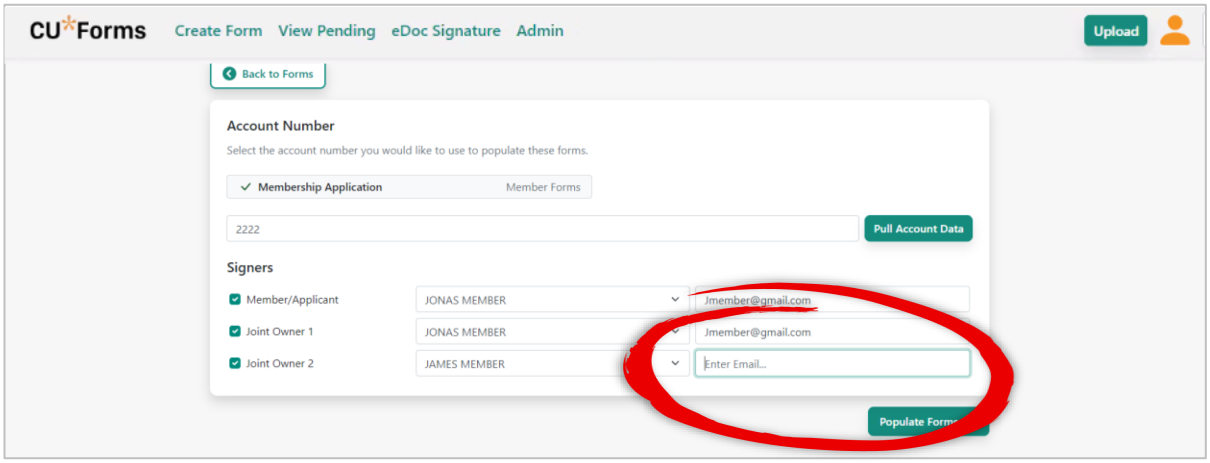


- You can also include names that are not included in CU*BASE.

You may edit the email addresses as needed.

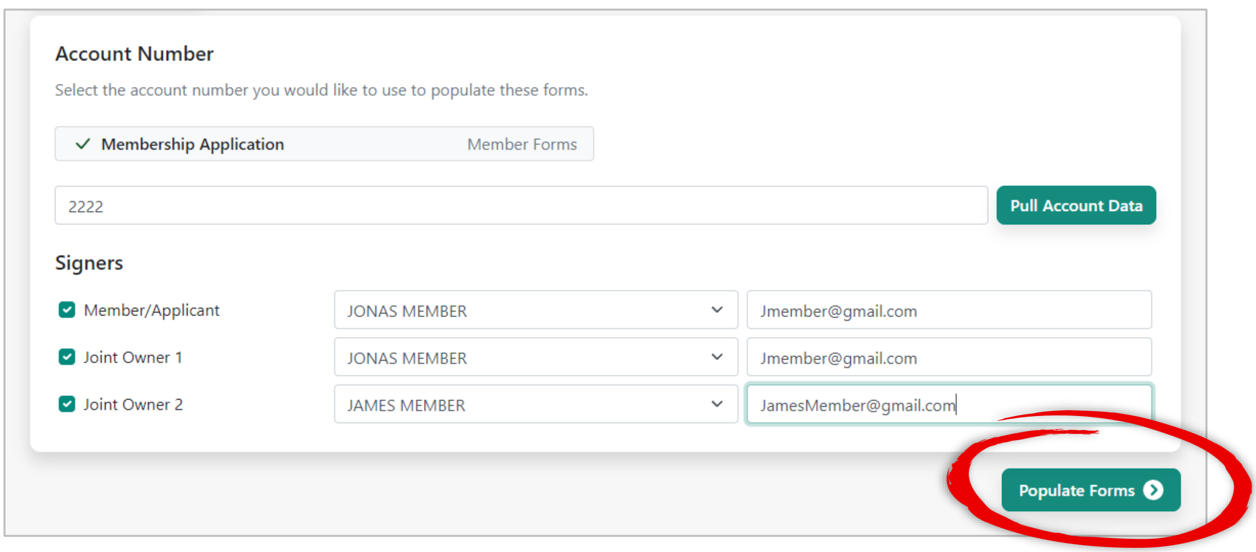
▷ IMPORTANT NOTE: This will not update the email address in CU*BASE.

Edit or Add Any Email Addresses



▷ You don't need to add an email address, but it is required to use eSign.

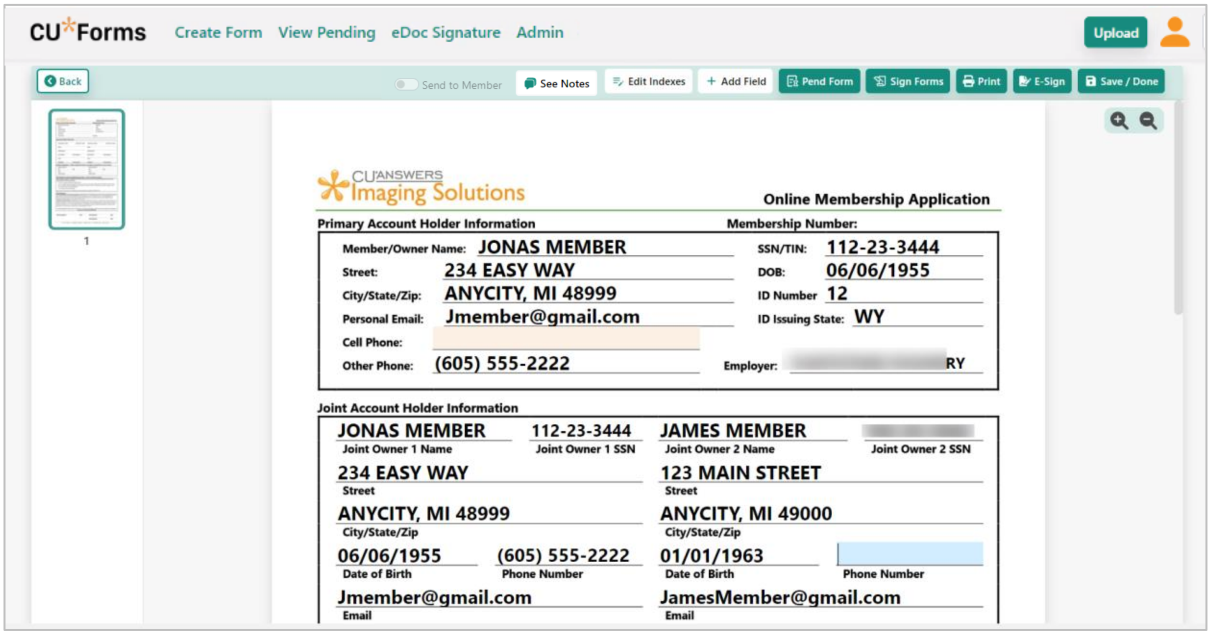
*Populate Form with Data from CU*BASE*



Now, it is time to populate the form with the data from CU*BASE. Click *Populate Forms*.

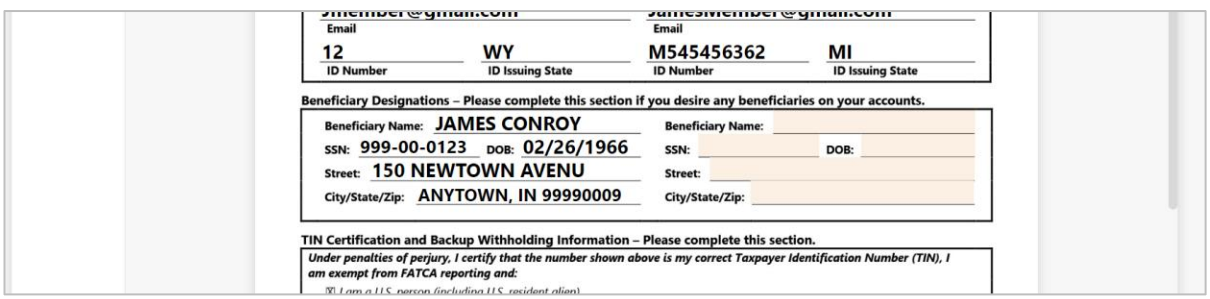
The populated data appears in the form(s) where the fields are mapped. (See next section on building the template.)

*Member and Joint Owner CU*BASE Data Populate Mapped Fields*



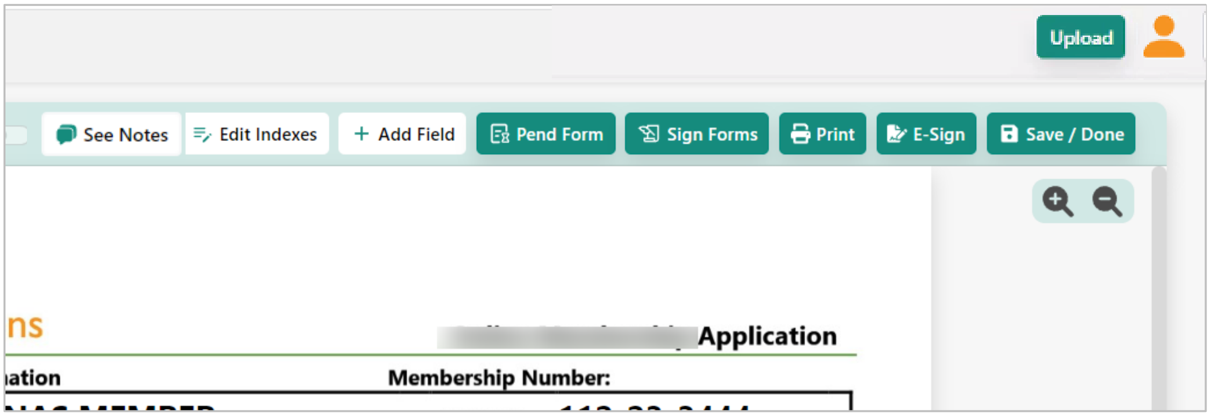
Since this form has beneficiary fields programmed, the beneficiary data is populated as well. (Learn more about programming beneficiary fields on page 25.)

Beneficiary Data Populates Beneficiary Fields



Advance through the form by clicking the Tab key. To complete the form, fill in any manual fields, such as text fields, check boxes, or signature fields.

Buttons at Top of Screen



There are several buttons in the upper right-hand corner of the form. Having members sign the form is covered below. Placing the form temporarily in the Pending area is covered on page 30.

When you have completed the form, you can also select to print and save the form. Saved forms are archived in idocVAULT.

Sign Form in Branch

You can set fields in a form to require a signature. If you advance to a signature field and have your configured signature pad ready, your member can sign the form in branch.

The member can sign on the device (such as an iPad) or by a signature pad. This selection is made at the top of the screen.

Signing Experience Selection

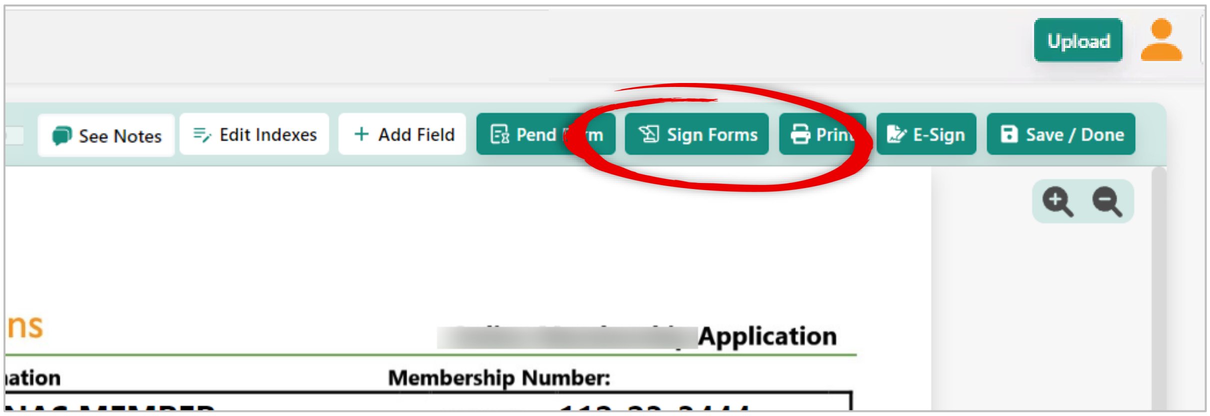
▷ NOTE: If you are using a signature pad, you must have SigWeb installed. (SigWeb is the interface between your Topaz signature pad and computer.)

Send Form for eSign

You can also advance directly to these fields by clicking *Sign Forms* at the top of the form. (See image below.)

If the form is configured for eSign, you can send the form out for remote signing and choose the form recipients from the email addresses configured when you set up the form. To start the process, click *E-Sign*.

Start Proces for eSigning

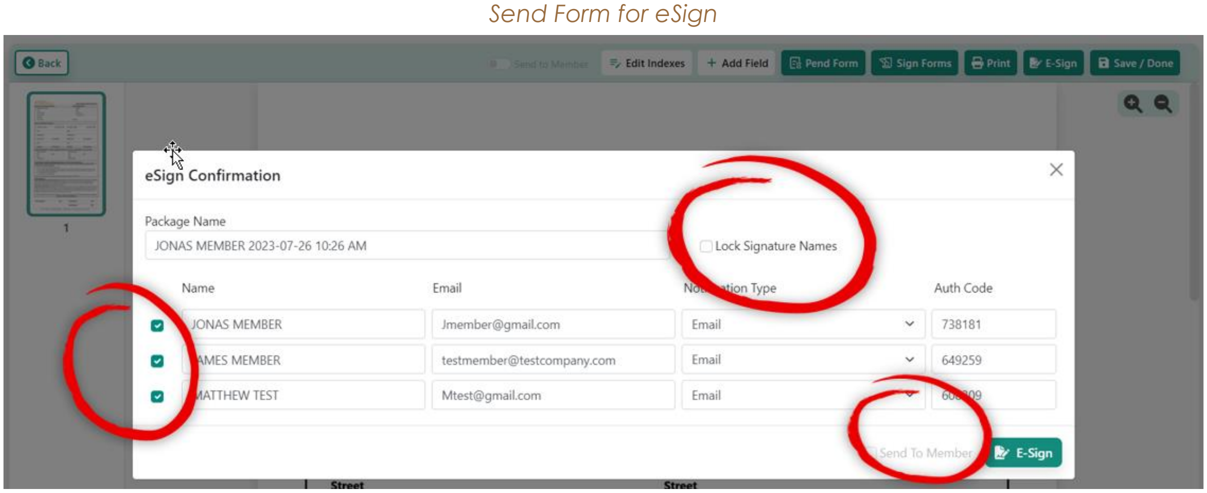


Select the form recipients by checking the boxes in front of their names.

You can also choose to select the following boxes:

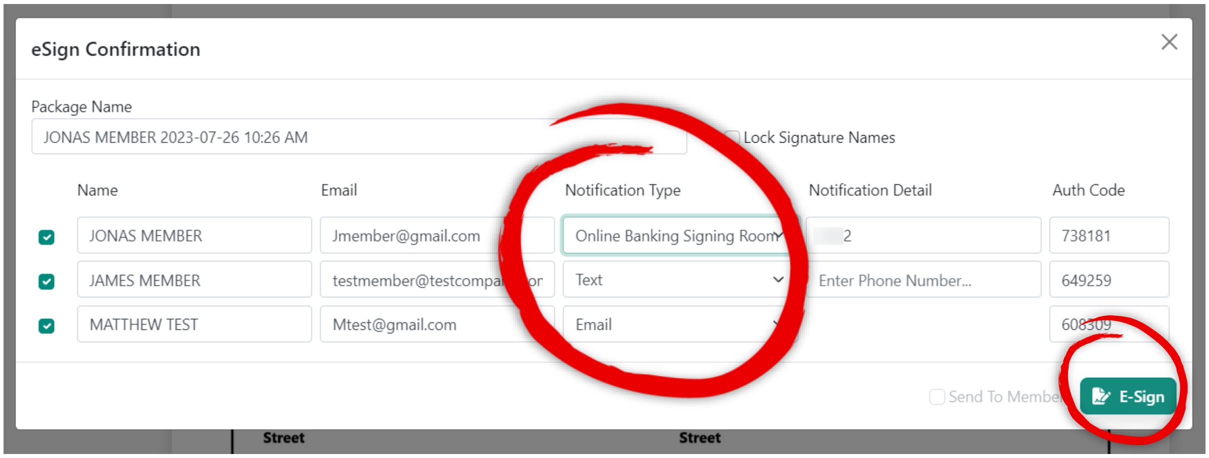
- *Lock Signature Names* forces the user to sign the name in the field stated by the credit union.
- *Send to Member* sends a copy of the form to **It's Me 247**. (NOTE: In this example, the field is greyed out, meaning it cannot be selected. If this is the case, when you click this box, you will be sent to the CU*Answers store to activate the feature.)

Send Form for eSign



Using the Notification Type field, you can elect to send the form to an **It's Me 247** Signing Room via email or text message.

eSign Notification Options



Click *eSign* to send the form to the selected persons via the delivery channel selected.

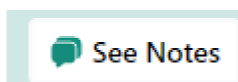
▷ Independently, you will need to provide the authorization code (listed on the eSign Confirmation screen) to the selected persons for them to access the form.

Read Notes

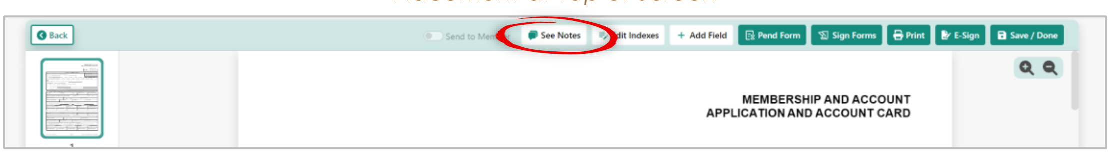
You can write notes in your templates to give helpful tips to front line staff when they are filling out the forms with the members. For information on configuring these notes, see page 18.

When filling out the form, the employee clicks *See Notes* at the top of the screen to view the notes configured for that template.

"See Notes" Button Example

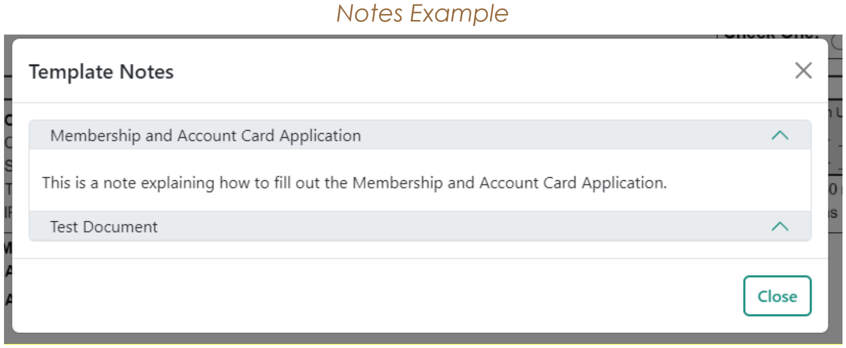


Placement at Top of Screen



Once the employee clicks the button, the note is displayed.

Notes Example



Build a Template

And Add Import Fields

Import PDF and Add Fields

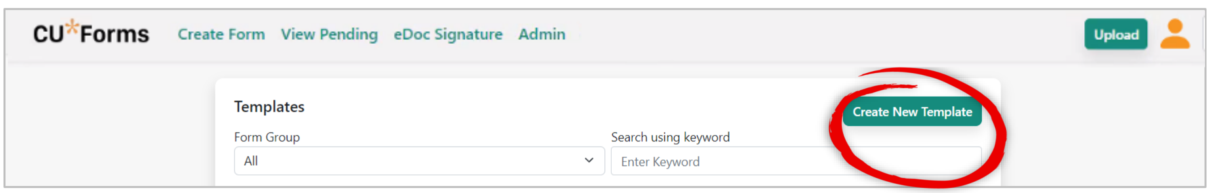
While CU*Forms allows you to enter fields on the fly, the easiest way to a professional-looking form is to create a base PDF with pre-defined fields. This can be done with a more advanced version of Adobe Acrobat or other PDF generator software.

Once you have the form fields designed on the PDF, it is time to import the PDF and assign CU*BASE fields to create a template. This template is then used to create a form, as covered in the previous section of this booklet.

Access Template Area

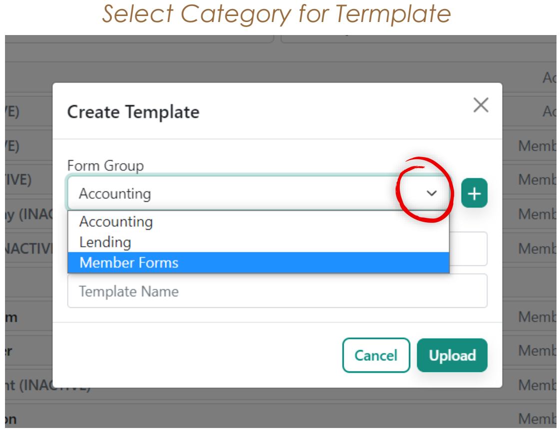
From *Admin*, select Edit *Templates*. Then, select *Create New Template*.

Build New Template



A window opens allowing you to categorize the template form, choose the file to import, and name the template.

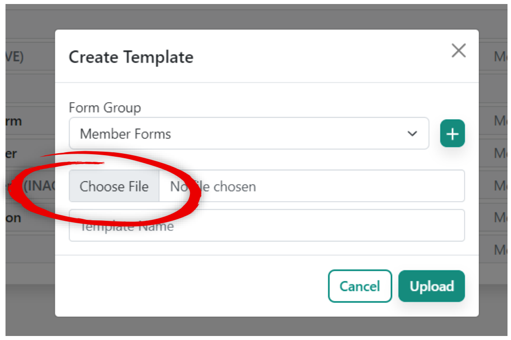
Select Category for Template



Import PDF with Defined Fields

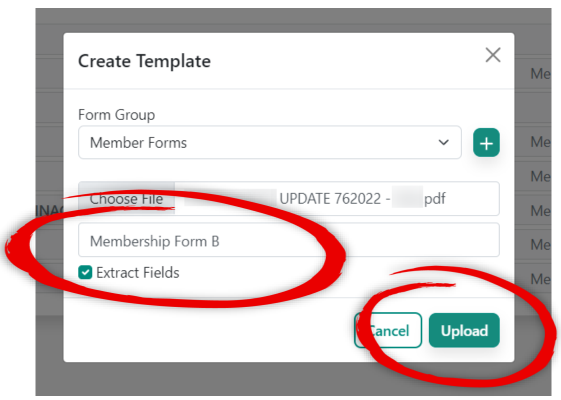
While it is not required, importing a form with defined fields is recommended. At this point, choose the PDF by clicking *Choose File* and browsing to find it.

Search Computer to Upload PDF



You can then rename your template to be something meaningful for use with other employees at your credit union.

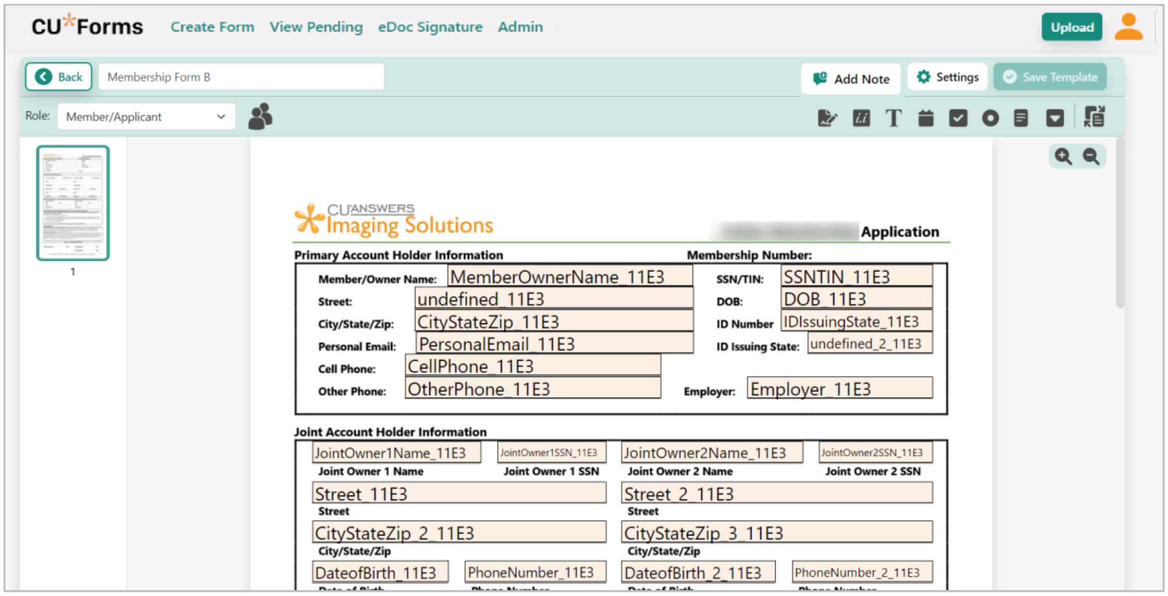
Rename Template



Leave *Extract Fields* checked. Then, click *Upload*.

The PDF will be pulled into the CU*Forms interface with each field assigned a field name. The next step is to map these defaulted fields to CU*BASE pre-defined fields.

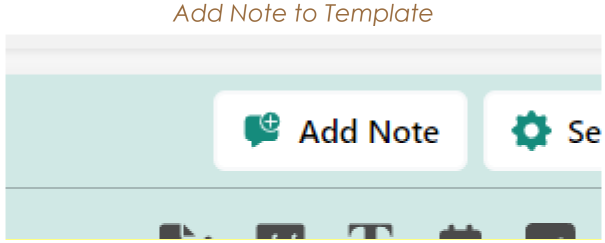
Template Uploads with Default Field Names



Add Note to Forms

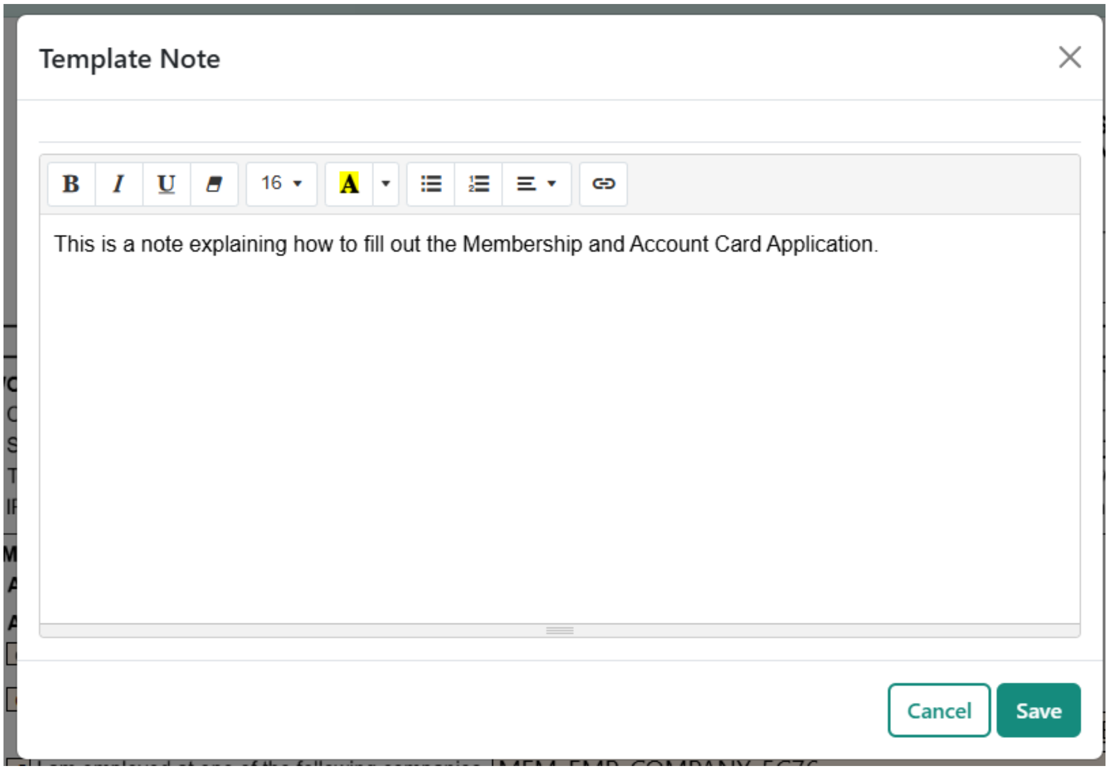
You can also add notes to forms so that front line staff have directions on how to complete the forms. To do this, click the *Add Note* button in the upper right corner of the screen.

Add Note to Template



A window will appear allowing you to enter the note. This note can be viewed when the form is filled in. For information on reading a note, see page 15.

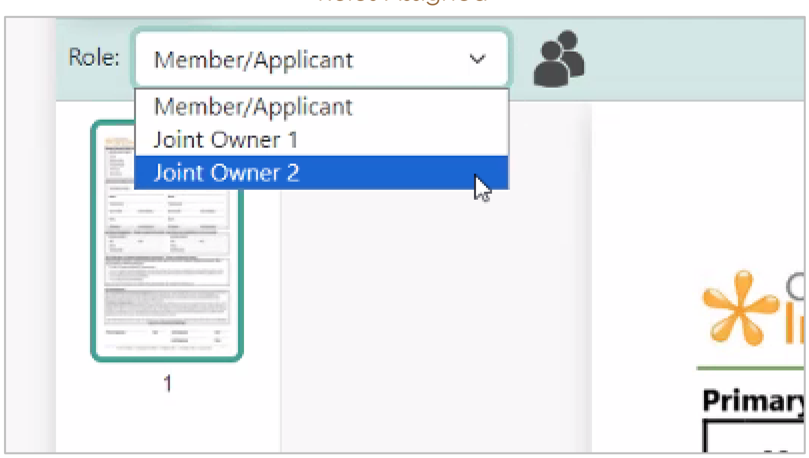
Compose Note



Member and Joint Owner

For CU*BASE pre-defined fields, assigning a member or joint owner is a two-step process. First, you must define that there are roles on the form. Here you can see that the roles are already assigned on this form.

Roles Assigned



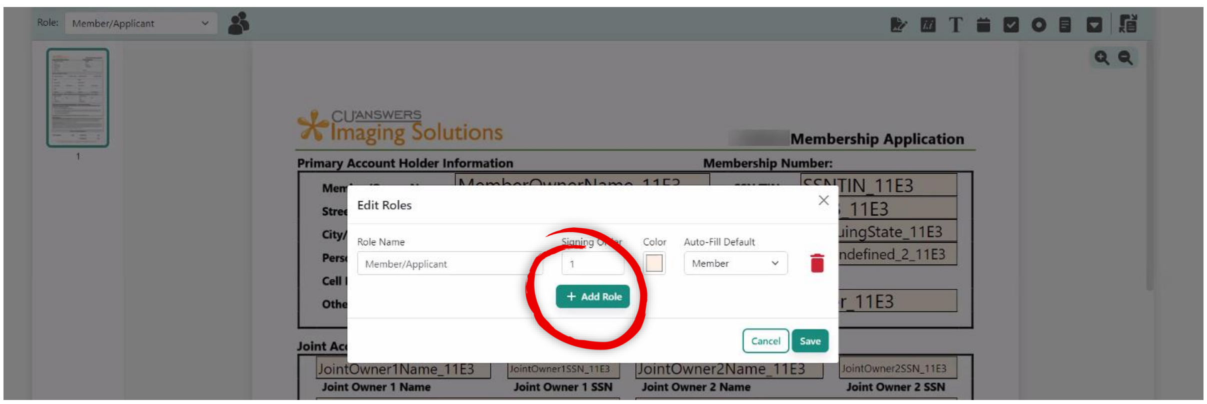
Assign Roles to Template

Roles indicate whether member or joint owner data will be populated. To assign roles, click the people icon in the upper left corner of the template screen.

Add Roles to Template

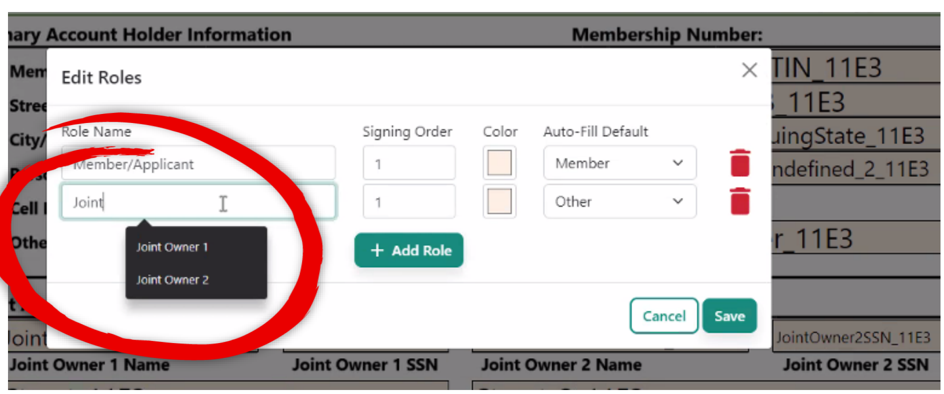
A window will appear allowing you to assign the roles. *Member/Applicant* is listed by default. To add joint owners to this form, click *Add Role*.

Member/Applicant is Default Role



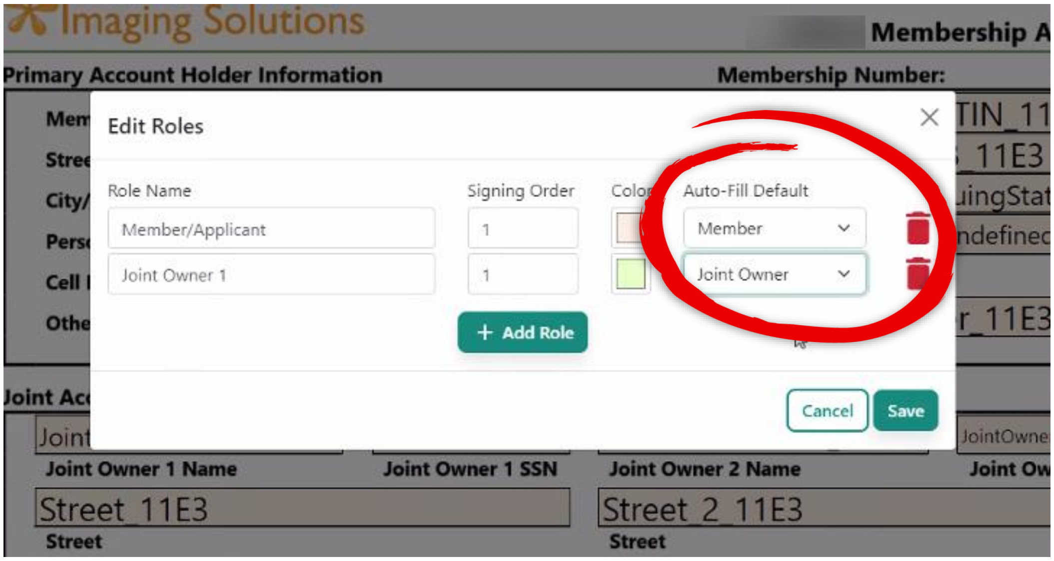
Enter a new role name.

Add Joint Owner Role



Set the *Auto-Fill Default* to *Joint Owner*.

Add Joint Owner Role

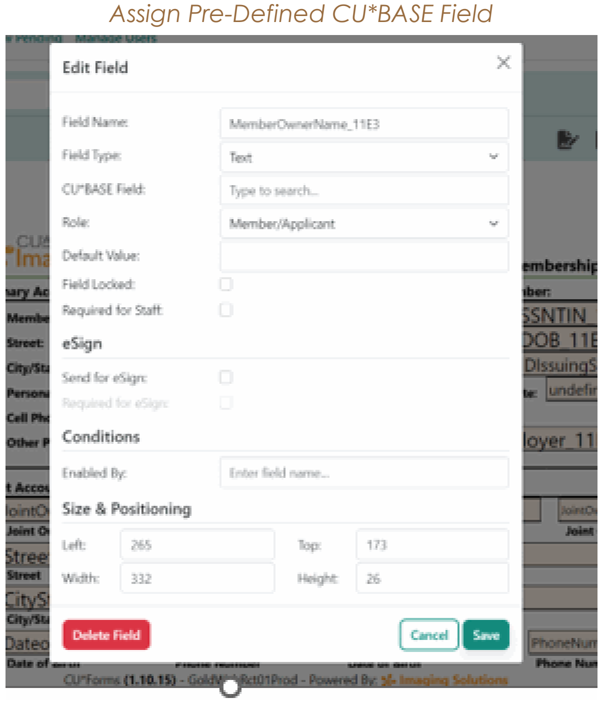


Add additional Joint Owner roles in this manner and then click *Save*.

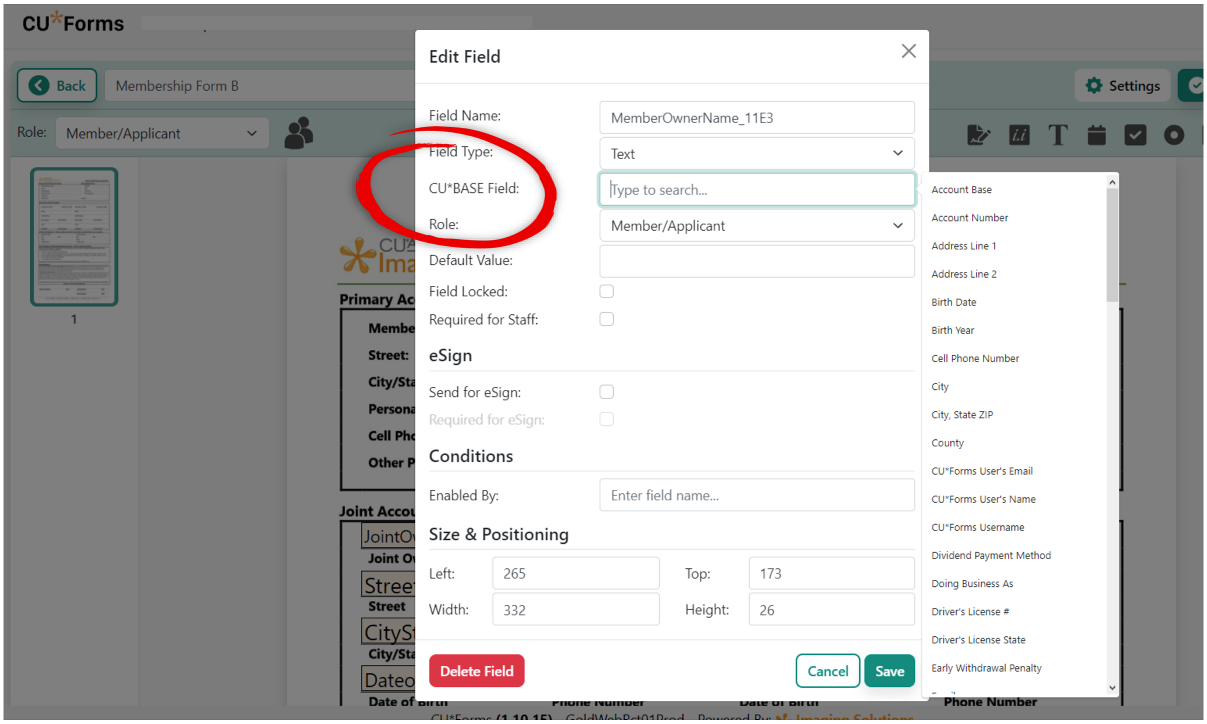
Assign Pre-Defined CU*BASE Fields

Next, indicate what data to populate when the employee clicks the *Populate forms* button. **Double-click** on each field to reveal the pre-defined listing of over 150 CU*BASE fields that can be mapped to your template.

*Assign Pre-Defined CU*BASE Field*

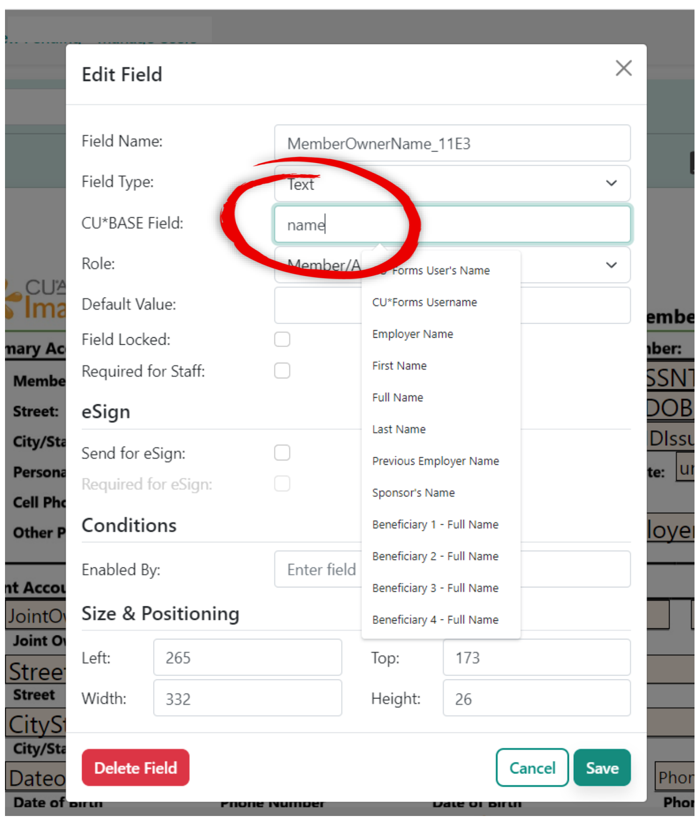


*Click CU*BASE Field to Reveal Listing*



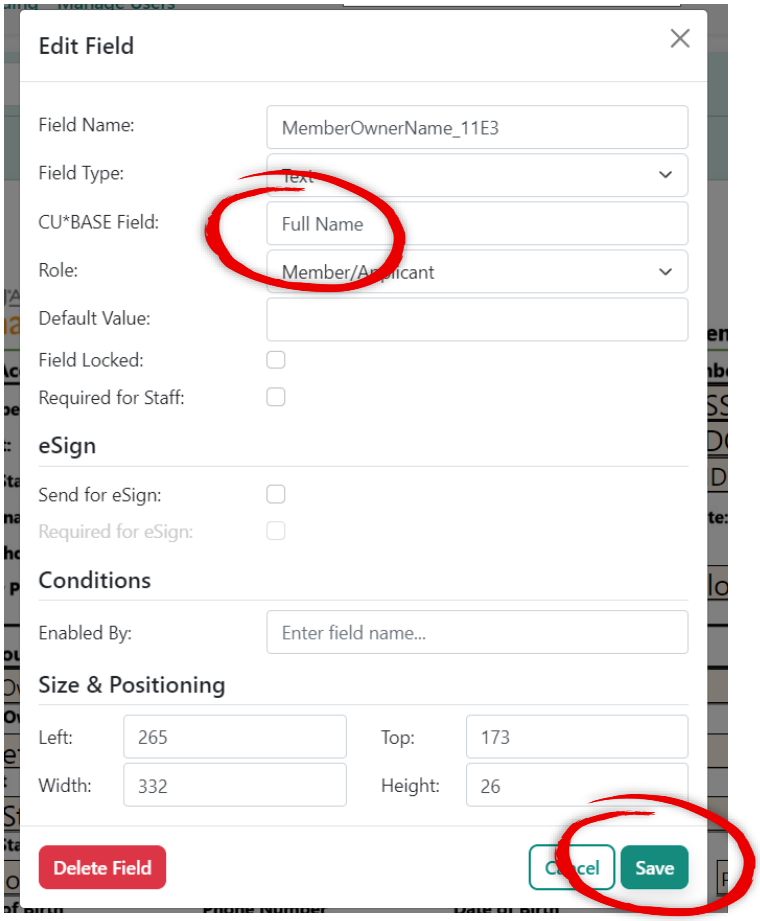
Then, shorten the list of available fields to select by typing to search (or scrolling through the list).

Shorten Field Listing



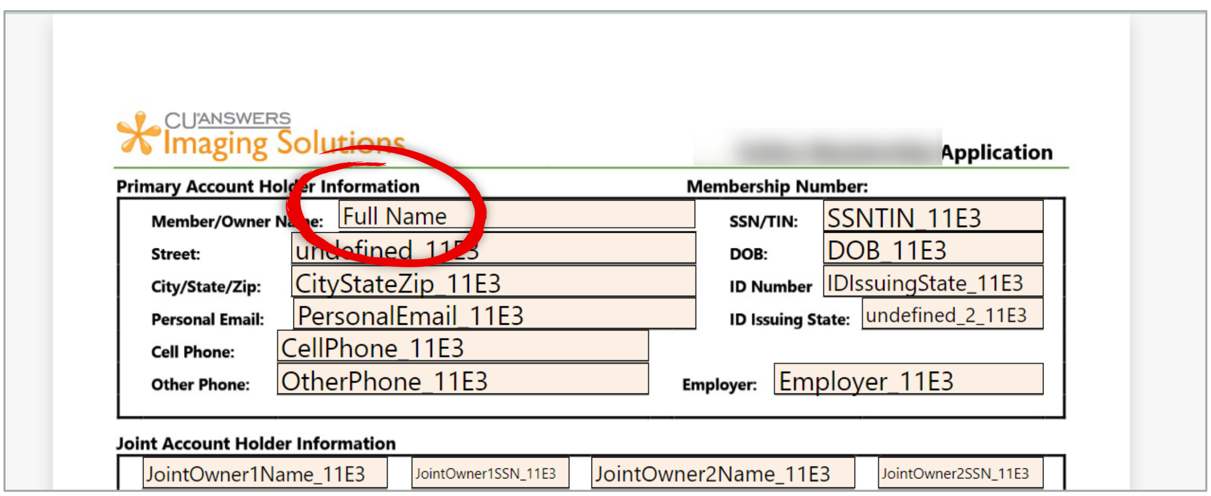
Select the desired field from the list.

Select Field



Click *Save*, and the field name will be updated.

*Field Mapped to CU*BASE Field*



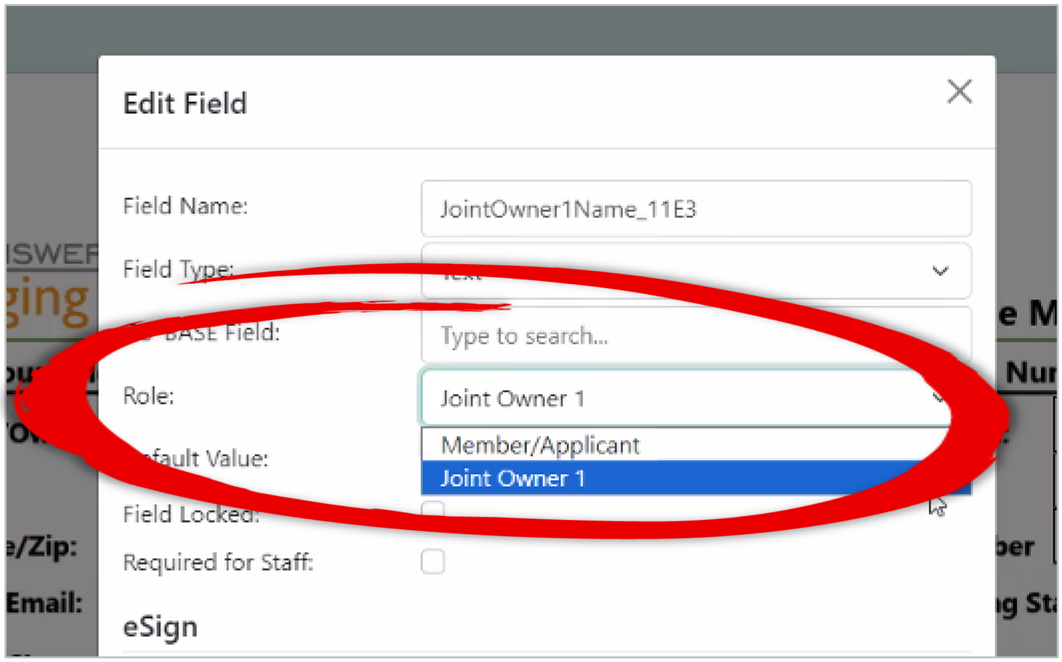
Continue this process until you have mapped all the needed fields.

Add Joint Owner Fields to Template

Since we added a joint owner role to the template, we can add pre-defined CU*BASE fields that will pre-fill joint owner data.

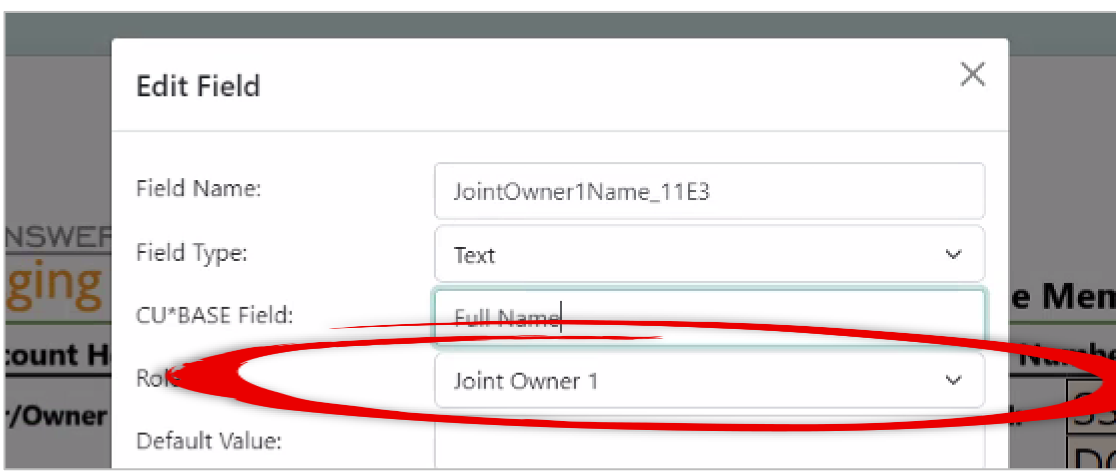
On the *Edit Field* screen, select the *Role* from the drop-down menu.

Select Role for Field



Then, when you select a CU*BASE field, the joint owner data will autofill when the form is created.

Joint Owner Field Populate

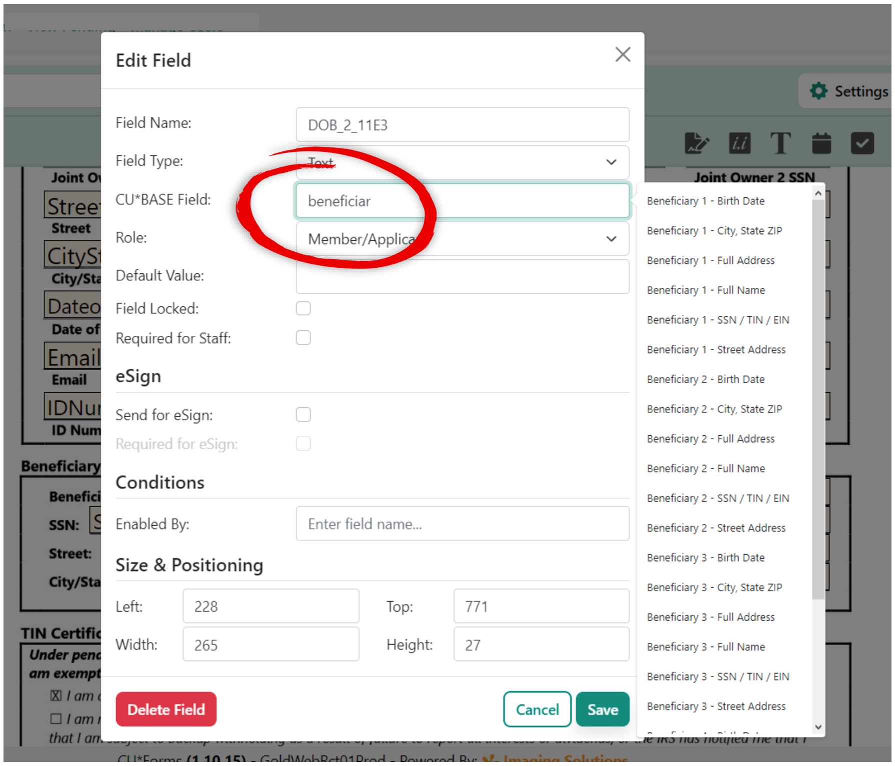


Assign Beneficiary Fields

Beneficiary data is automatically populated in the form if a beneficiary field is mapped and a beneficiary exists on the membership.

Type keyword "beneficiary" (or a part of the word) in *CU*BASE Field* to present these fields for selection.

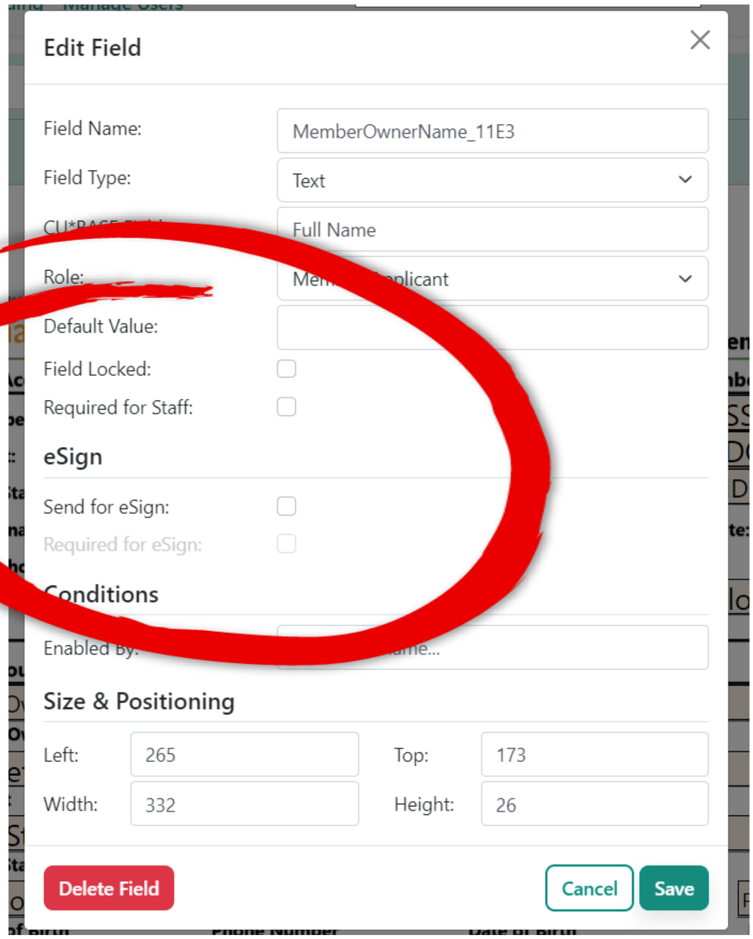
Assign Beneficiary Fields



Other Field Options

On the *Edit Field* screen, you can define additional field attributes.

Other Field Attributes



The following field-level settings can be granted.

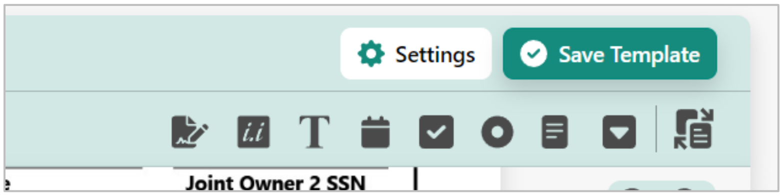
Field Settings

Field	*Description*
Default value	This value is auto filled in this field each time the form is created. For example, use this with your credit union name.
Required for staff	A credit union employee must fill in this field.
Field locked	The value in this field is locked and cannot be changed.
Send for eSign	This field will be sent to a member to fill in with eSign.
Required for eSign	This field is required when the form is sent for eSign. For example, use this with a signature field.

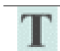
Adding Manual Fields

You can also manually add a variety of commonly used fields, including assigning a signature field, check box, text field, and more. Click on the corresponding icon on the toolbar to add this type of field.

Manual Field Options



Manual Field Options

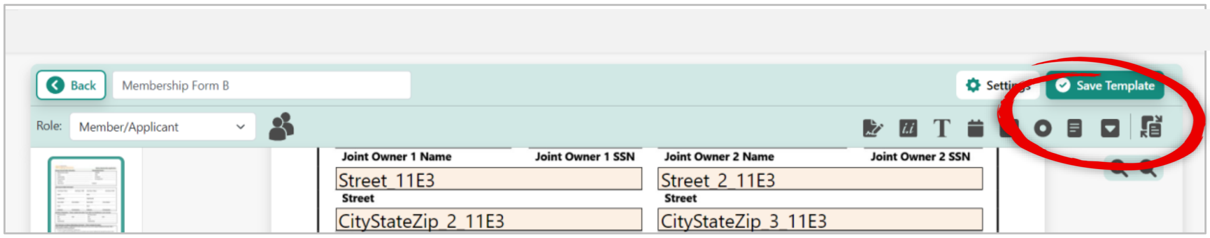
Field	*Description*
	Add signature field.
	Add initials field.
	Add text box.
	Add date field.
	Add checkbox.
	Add radio button.
	Add memo field (for longer text, such as a paragraph).
	Add a drop-down menu. (An area will appear to allow you to enter the options.)
	Replace form. This allows you to replace the template in the background. Use this when your company changes your logo, for example.

Save Template

This section covers saving the completed template, so all users can use it to create forms.

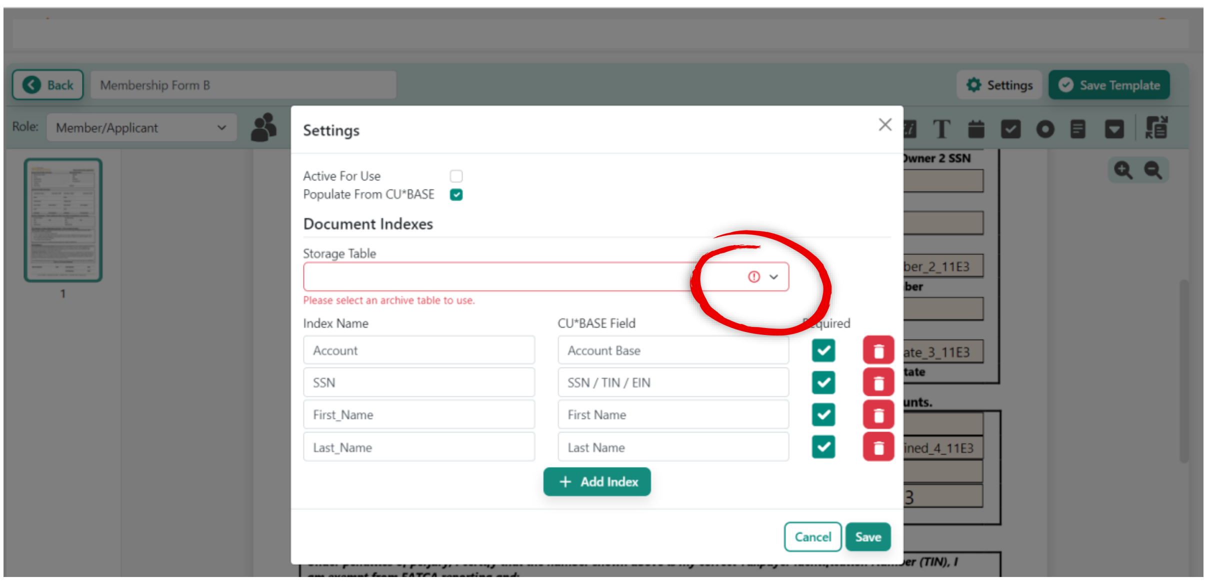
When you have completed mapping and configuring the fields on the template, click *Save Template*.

Save Template



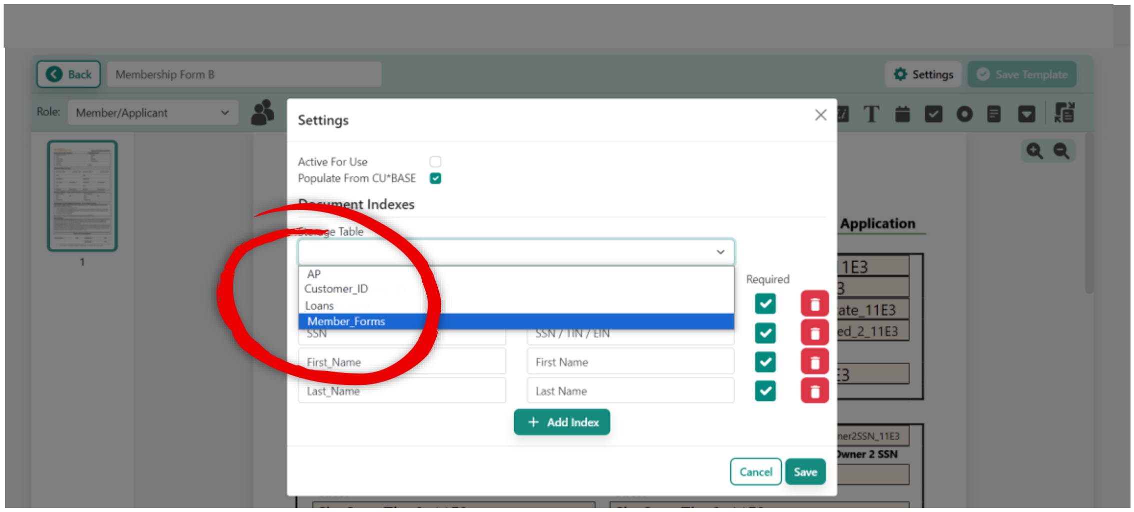
You will then be asked the Storage Table to which you want to save your template.

Settings for Saving



Select the appropriate category from the drop-down menu.

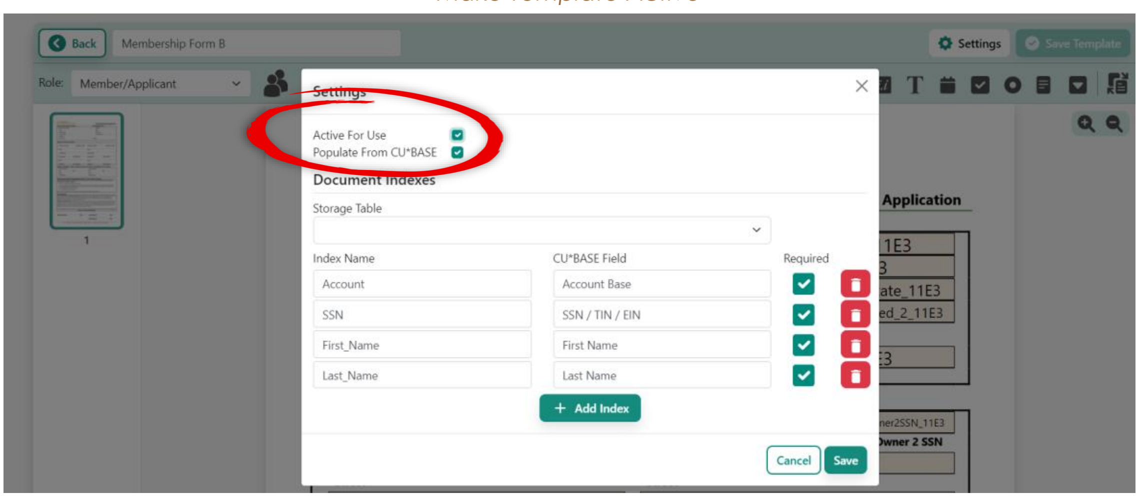
Select Storage Table



Check *Active for Use* when you are done creating the template.

▷ IMPORTANT NOTE: If you do not mark it as *Active for Use*, the form will display as inactive. It will remain a draft and be available only for other users with *Edit Template* permissions. This can be helpful, however, for testing the form.

Make Template Active



Then, click Save. The button will then read *Template Saved*.

When you select *Create Forms* and are prompted to create new forms, the form template will be available for use.

The Pending Area

Temporarily Holding Forms

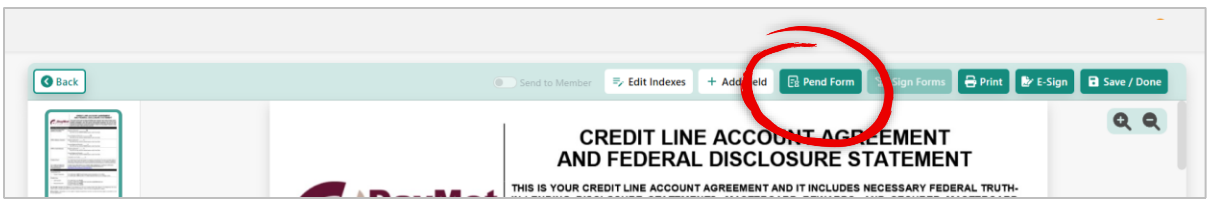
You can temporarily save an incomplete form to the pending area, for example, if you are waiting for a member to sign the form in branch,

- ▷ All users have access to add forms to the pending area and to view and retrieve pending items. Only users with Manage Pending permissions can create and delete the folders in the pending area.

Add Form to Pending Area

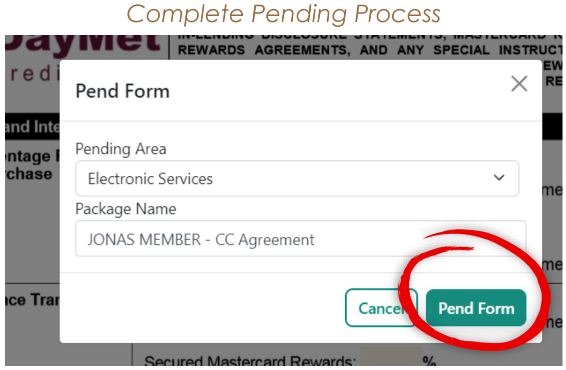
To begin the process of adding a form to the Pending area, click *Pend Form* from the form creation screen.

Begin Pending Form Process



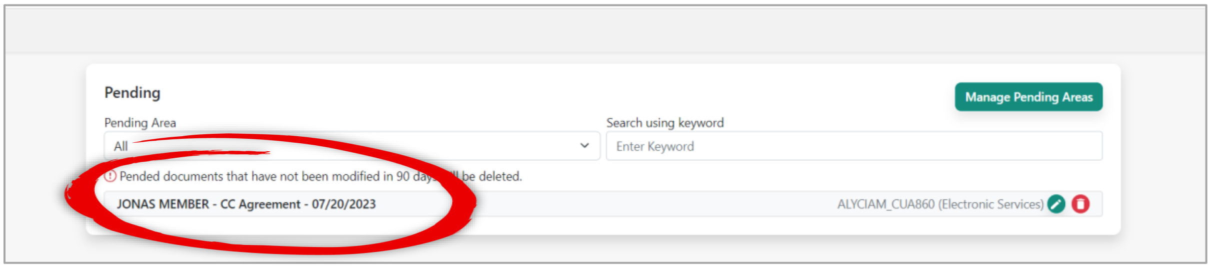
Select the sub folder where you want to save the form. Click *Pend Form* again to complete the process.

Complete Pending Process



The pending form can then be viewed under the View Pending tab.

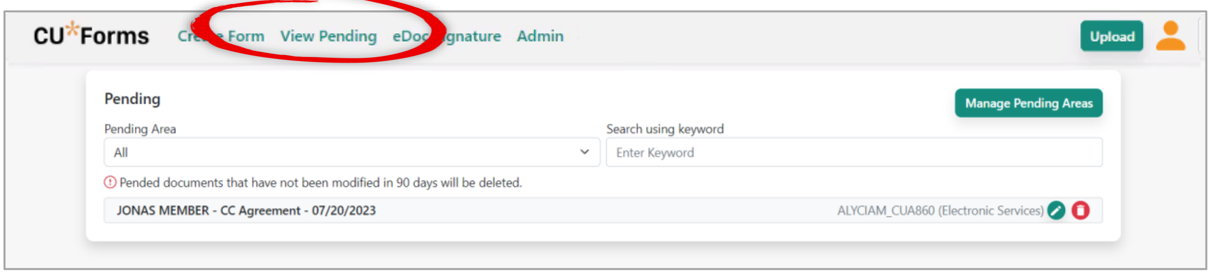
Pending Form Saved in Pending Area



Retrieve Pending Forms

To retrieve a form saved in the Pending area, click *View Pending*.

Retrieve Form Saved in Pending Area

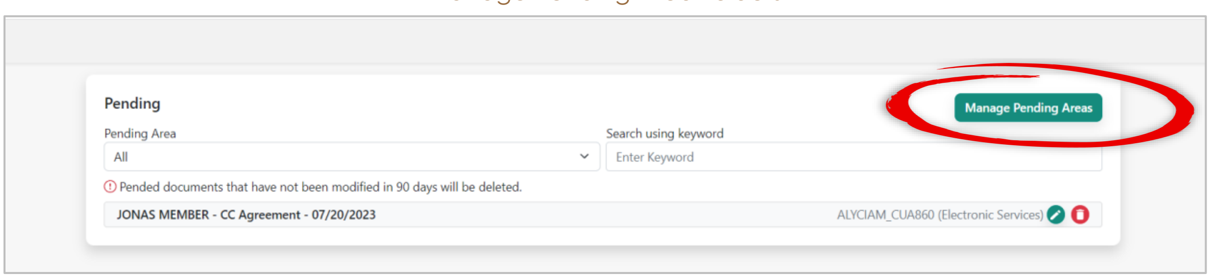


Simply select the form from the list. It will open in CU*Forms, ready for the form to be completed.

Add Additional Pending Folders and Delete Folders

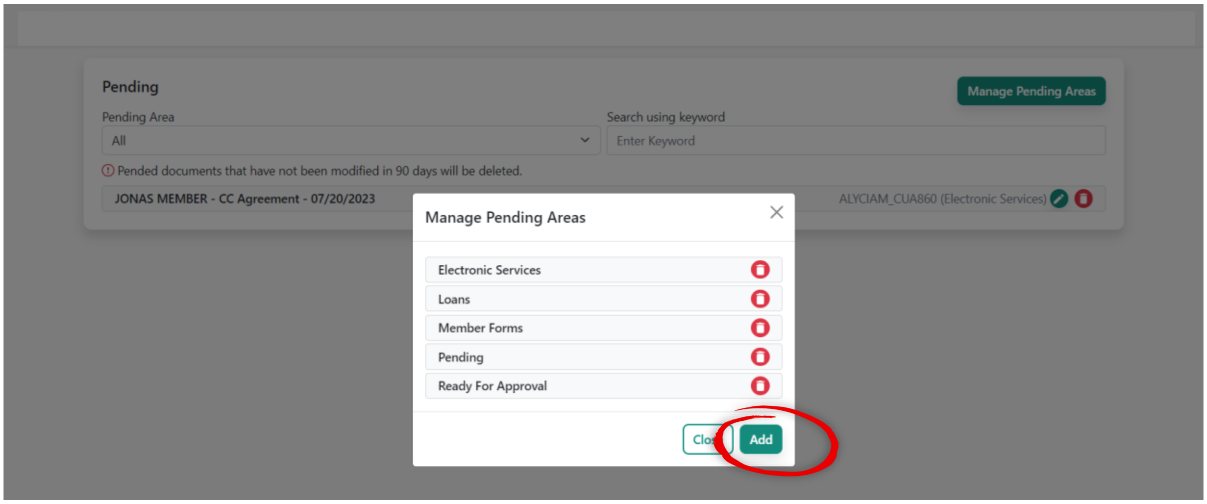
To manage the folders where you save pending items, access the pending area.

Manage Pending Area Folders



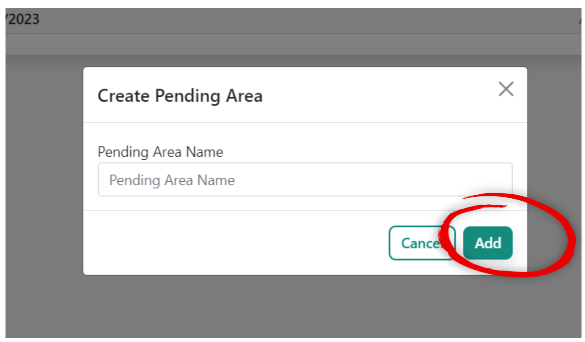
From the Pending area, click *Manage Pending Areas*.

View Pending Area Sub-folder Structure



To add an additional folder and create a new pending area, click *Add*. Then, name the new folder in the space provided and click *Add*.

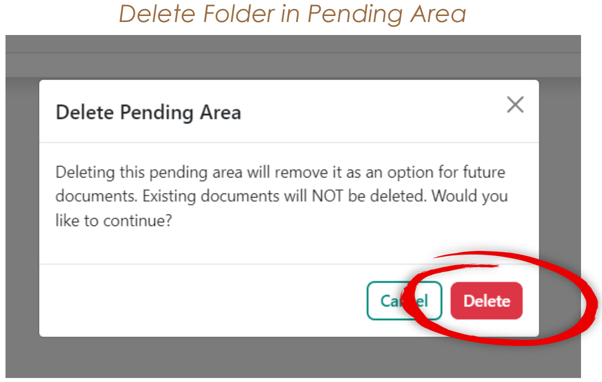
Add New Sub Folder in Pending Area



To delete a folder from the pending area, click the trash can icon next to the folder. Then, click *Delete* on the confirmation window.

The existing documents in the folder will not be deleted but will be kept in the master pending area folder.

Delete Folder in Pending Area



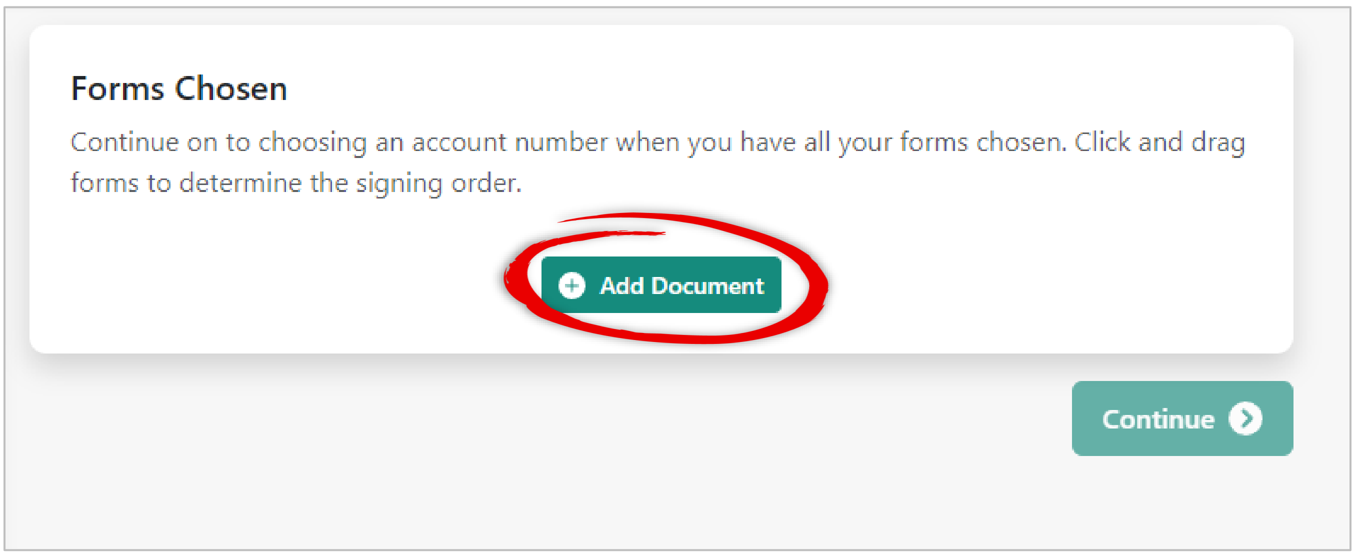
Upload General Form for eSign

Uploading Document to Send to Member for eSignature

If needed, CU*Forms allows you to upload single documents for one-off situations where you might need a signature. (This might be for a disclosure that you need the member to initial, for example.)

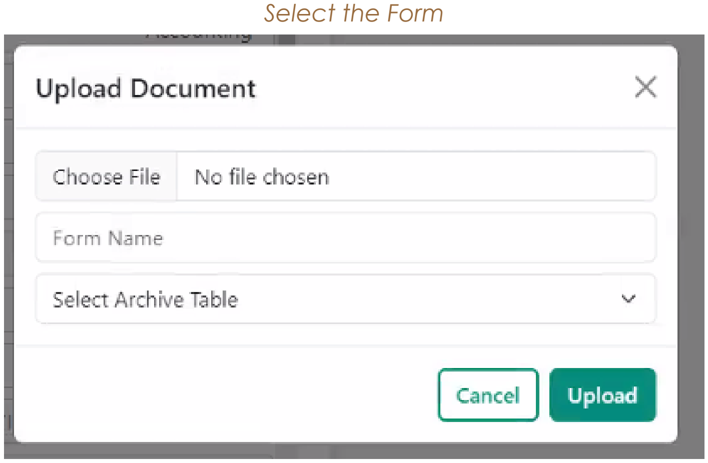
On the main create forms screen on the right panel, click *Add Document*.

Select to Add Document



The window appears that allows you to select the form from your computer.

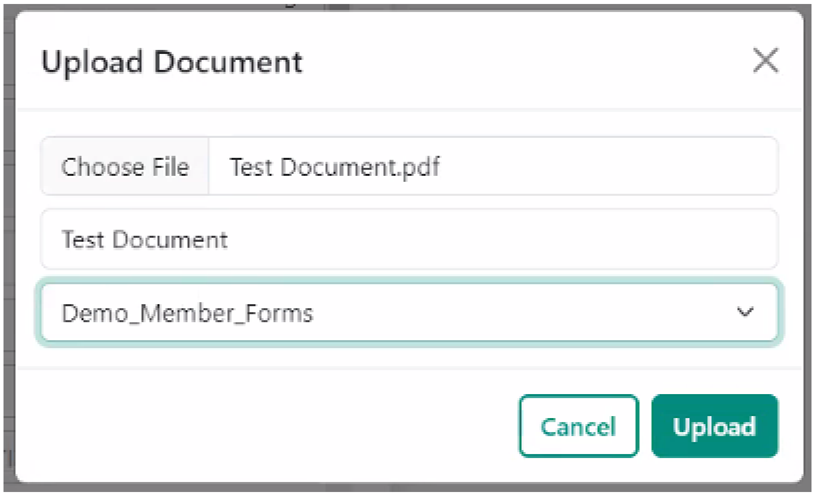
Select the Form



From the window above, select the form and the archive table.

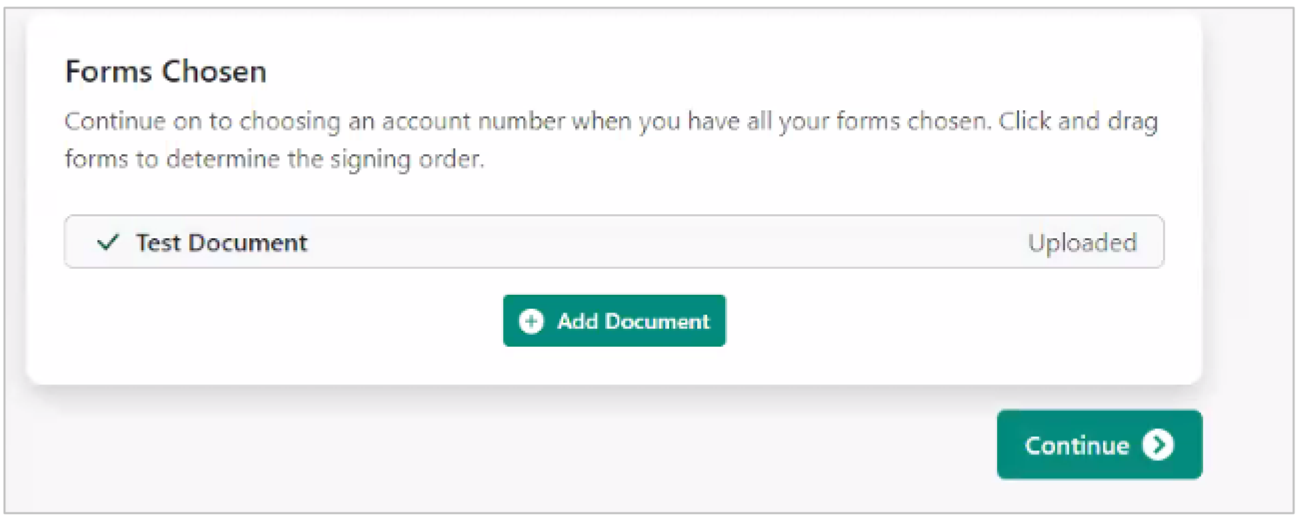
Below we see the form and archive table are selected.

Form and Archive Table Selected



Next, click *Upload*. The form will appear in the list.

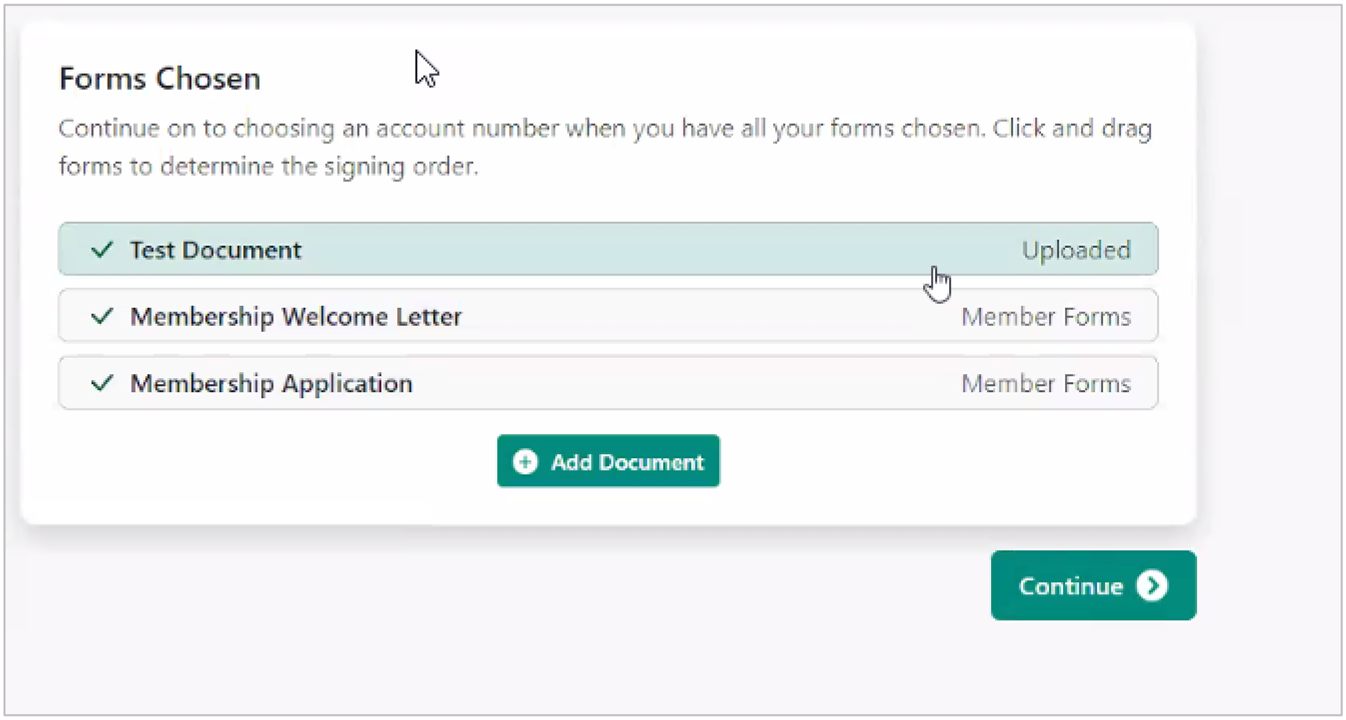
Form Appears on List



Adding Additional Forms

At this point, you can also add additional forms, as shown in the image below. This way you can also select forms that are already programmed for CU*Forms. If you need to add another form, click *Add Document*.

Multiple Forms Selected for Package

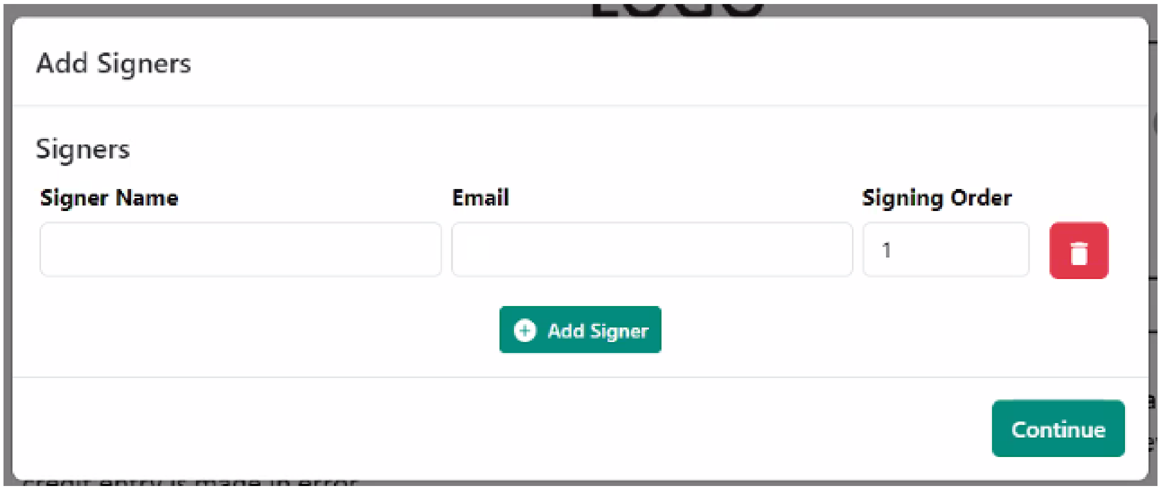


When you are finished adding forms, click *Continue*.

Adding Signer Information and Signer Fields

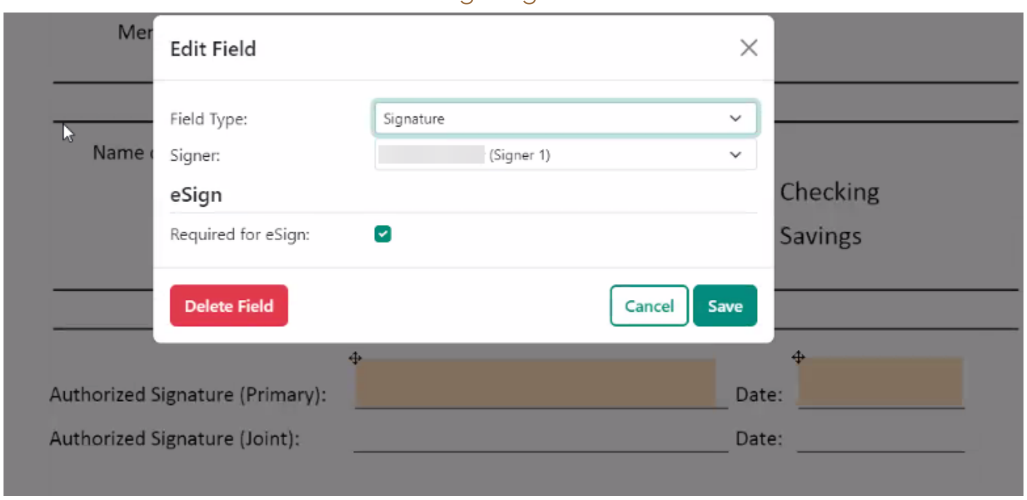
If you do not add additional forms and a signer is not identified, you will be prompted to add one. Then, click *Continue*.

Adding Signers

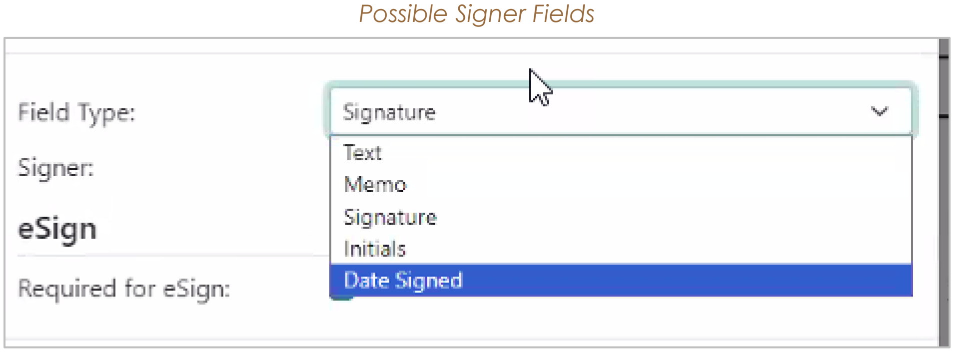


Then, click *Add Field* to add signer fields. Below is an example of a signature field and the possible types of signer fields you can add.

Adding a Signer Field



Possible Signer Fields



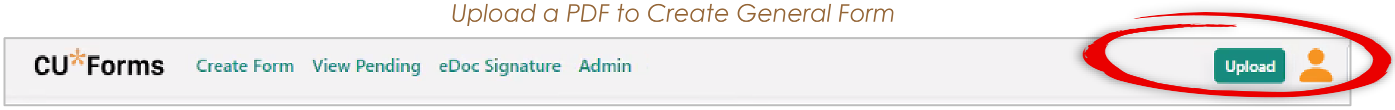
Upload General Form for Archive

Archive General Form to Membership

You can also archive a general form to a membership without importing CU*BASE data. To do this, click the *Upload* button to the right of the top navigation bar.

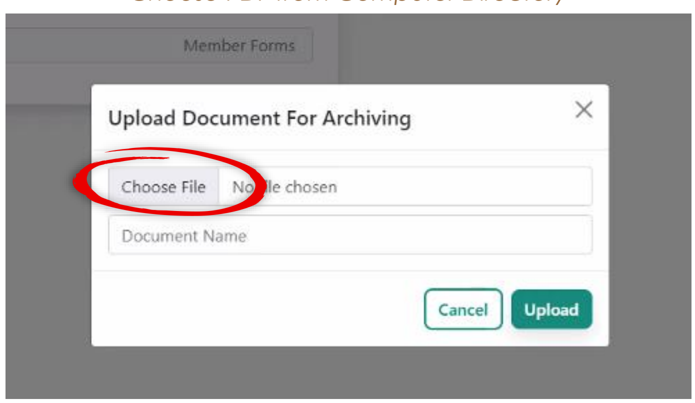
- ▷ This procedure allows you to upload a document to the vault but does not allow you to send it to members for eSignature. That was covered in the previous section.

Upload a PDF to Create General Form



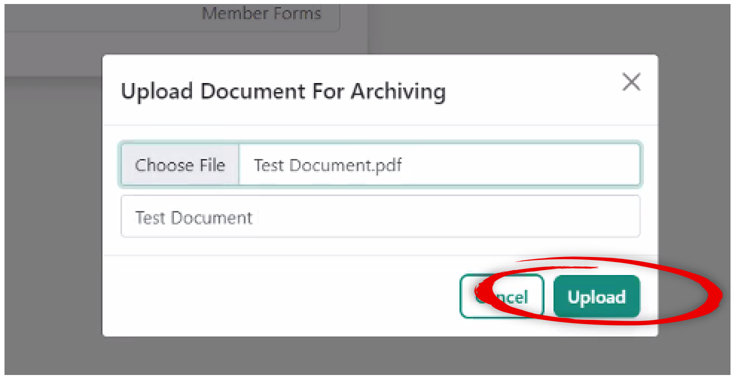
A window will appear allowing you to upload the PDF form.

Choose PDF from Computer Directory



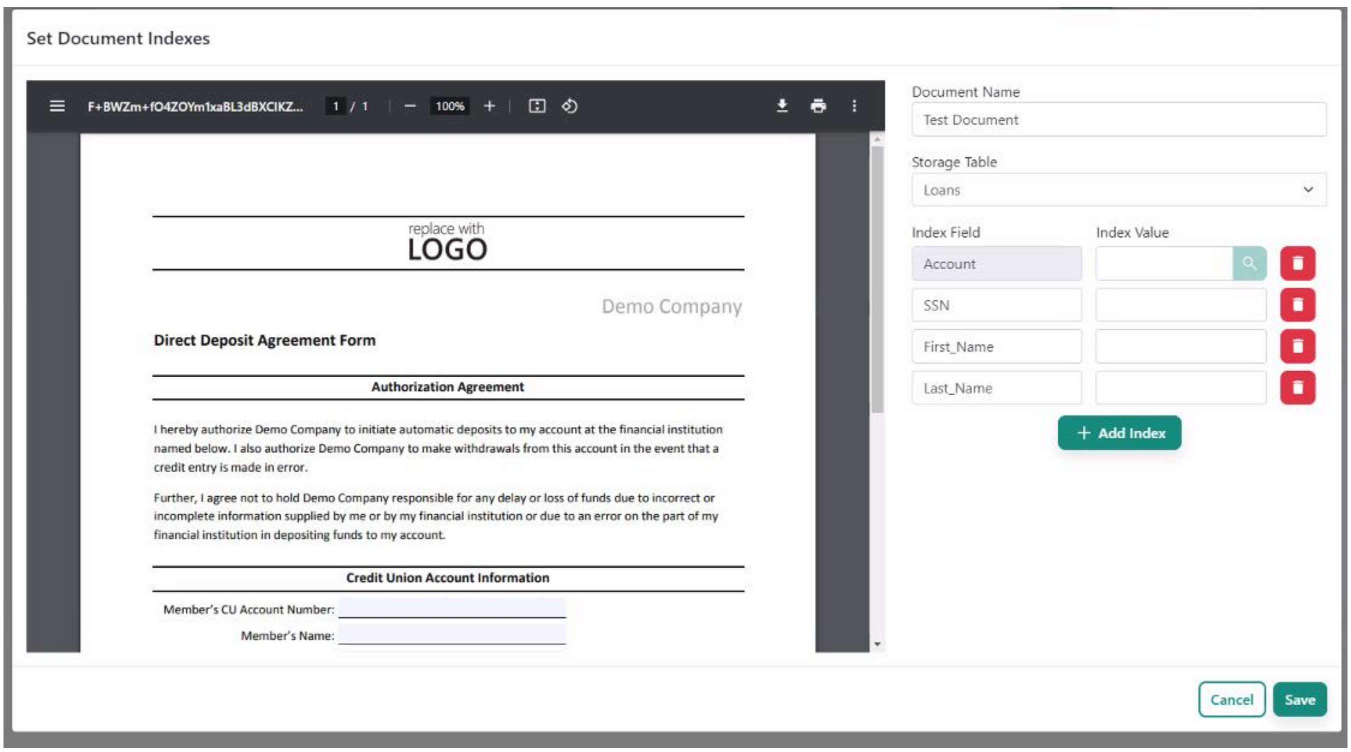
Click *Choose File*. Navigate to the file on your computer and select it. The file name will then appear in the CU*Forms window.

Final Upload of the PDF Form

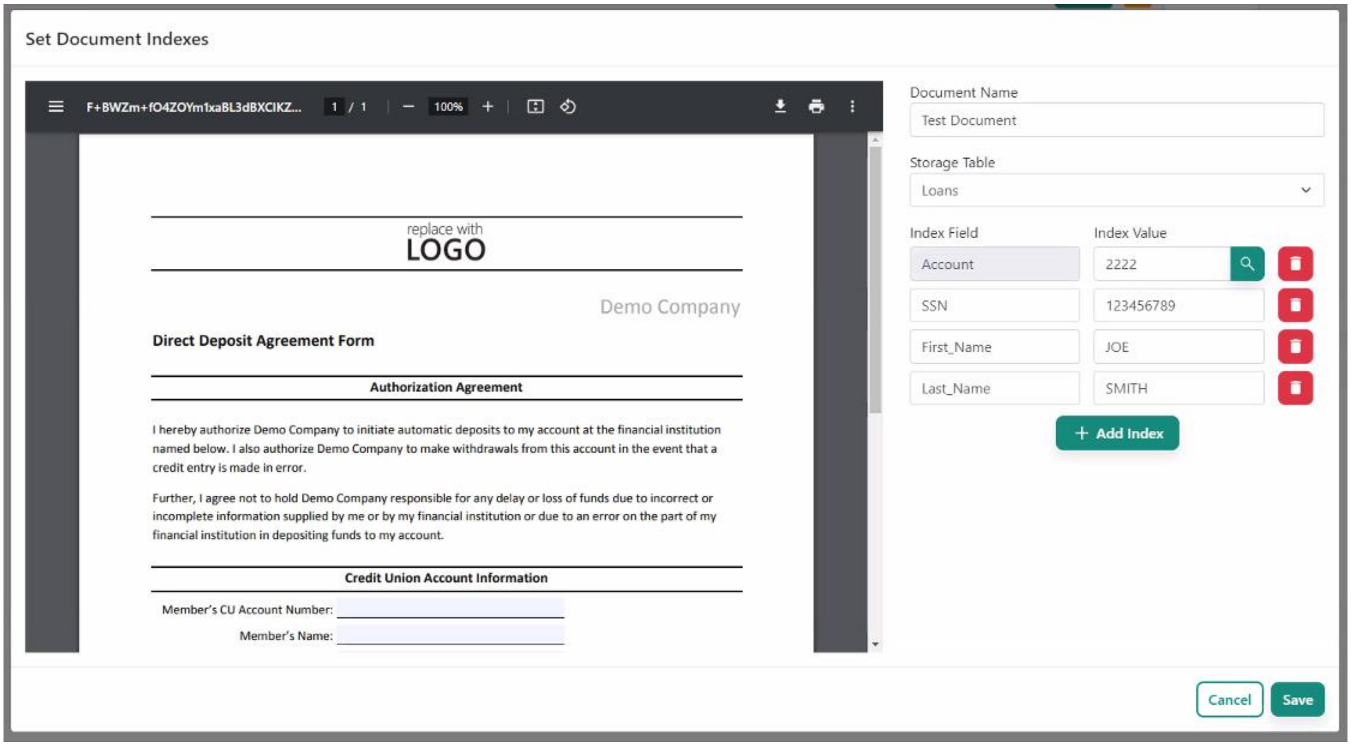


Click *Upload*. The fields will appear allowing you set the document's field indexes.

Form Ready to Index



Enter Index Values for Archive



Once the indexes are filled in, click *Save*. The form will be archived.

FormFLOW Configuration

Configure Forms for Processes and Auditing

This feature requires separate activation. Contact the Imaging team for assistance.

FormFLOW allows you to set up forms and process checklists for any type of forms.

- ▷ FormFLOW can be used with account opening. It is encouraged that you connect the forms to your product and create the checklists before working in this manner.

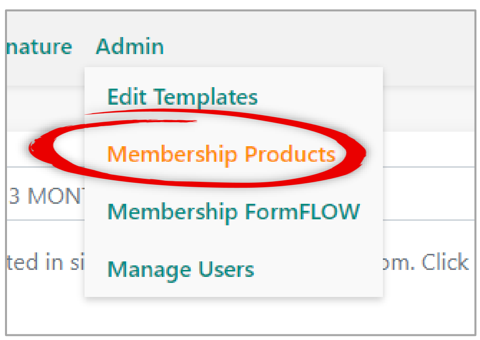
Administrator access is required for these two steps.

Configure Products for FormFLOW

This step attaches existing forms to your credit union products. (See page 16 for creating the forms.) When the frontline staff opens a sub account, the appropriate forms are presented by FormFLOW for completion.

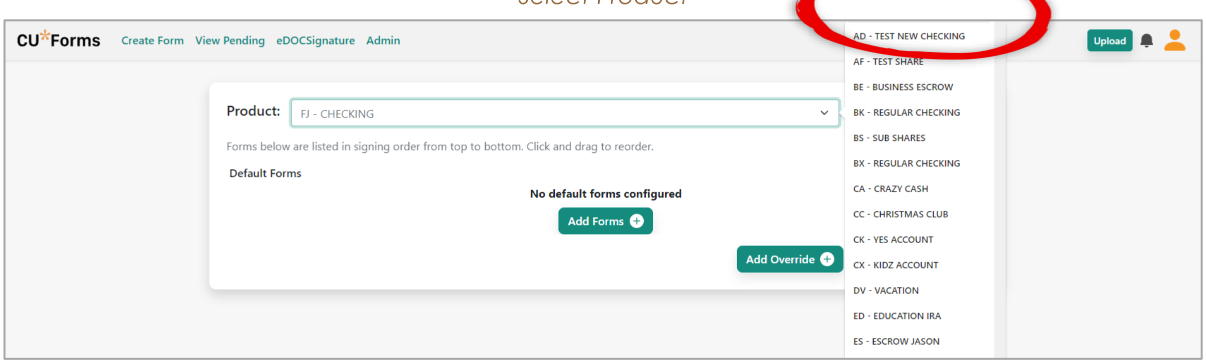
To begin the process of matching the product to the forms, select *Membership Products* under the Admin tab.

Enter Membership Products from Admin



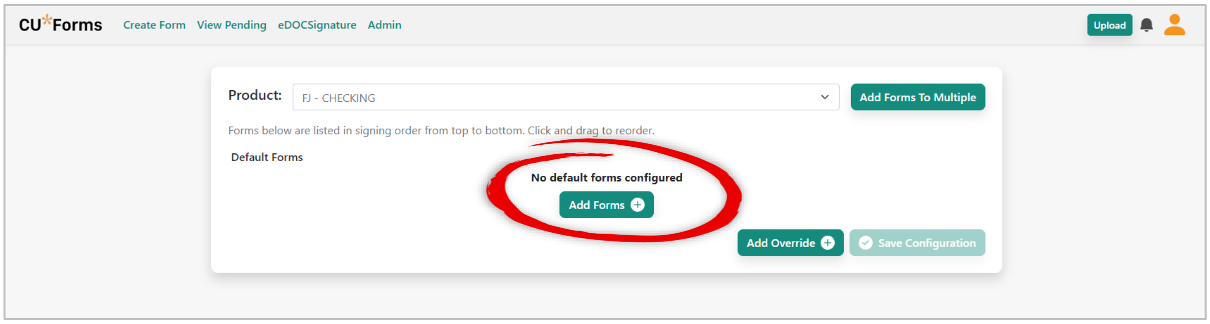
Next, select the product from the drop-down menu next to *Product.*

Select Product



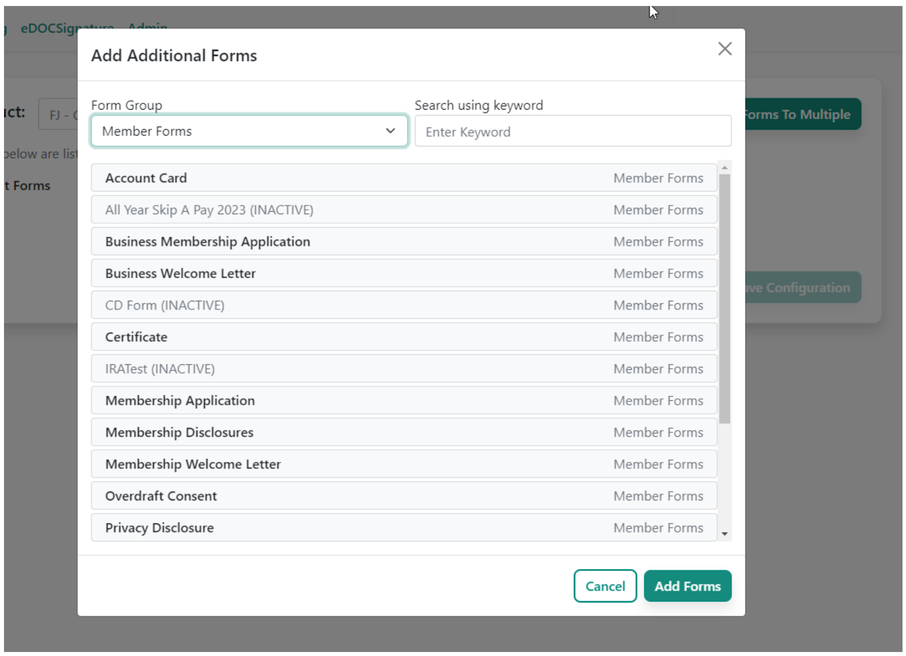
As you can see, the *Default Forms* are blank at entry, and there are no forms attached to the product. Click *Add Forms* to add them.

Add Forms to Product



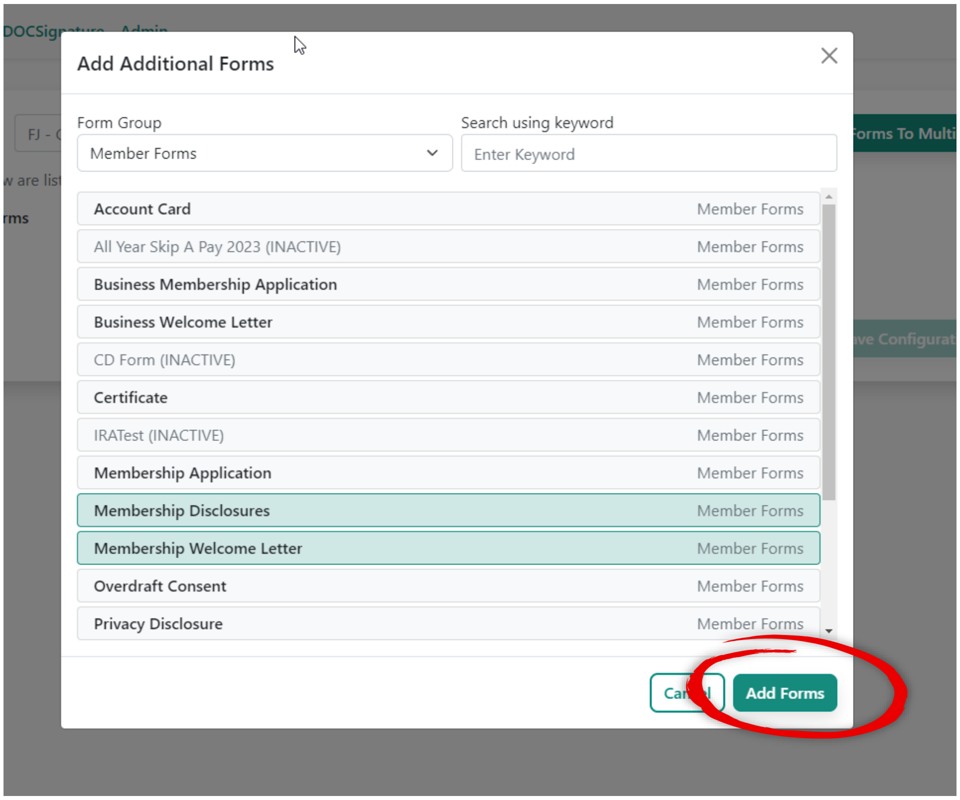
Here we have already narrowed down the forms by selecting *Member Forms* from the *Form Group* drop-down menu.

Forms Ready for Selection



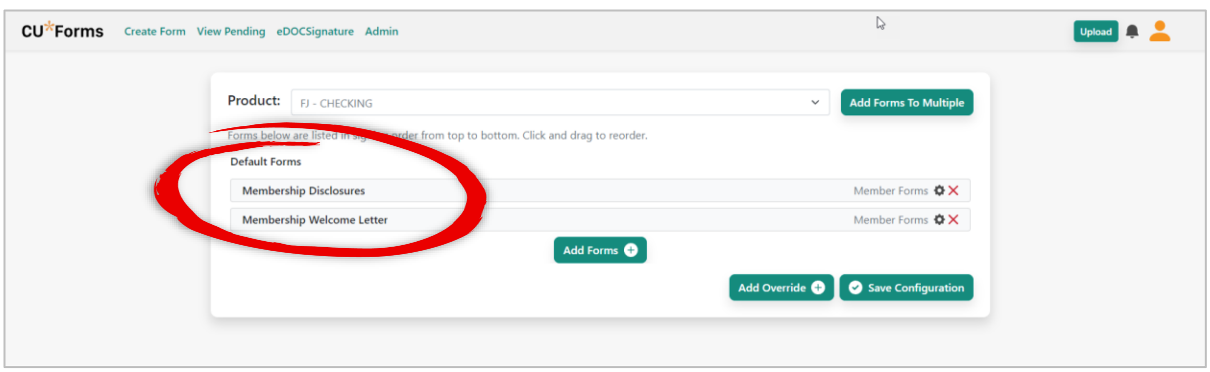
Select the forms you wish to attach to the product and click *Add Forms*.

Select Forms From Listing (Sublist Selected)



The forms are now added to the product and will be presented during account opening.

Forms Attached to Product



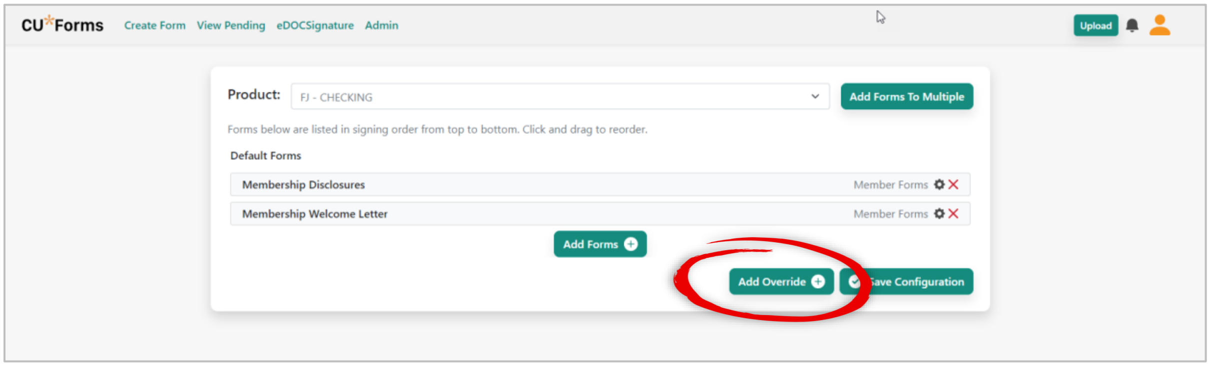
- ▷ If you need to remove any form, click the red X to the right of the form.

Add Membership Designation Override

You can also create an override, so a different form is presented for a membership of a specific membership designation, for example a business account. Membership Designations are configured in **Tool #523 *Member Designation Configuration***.

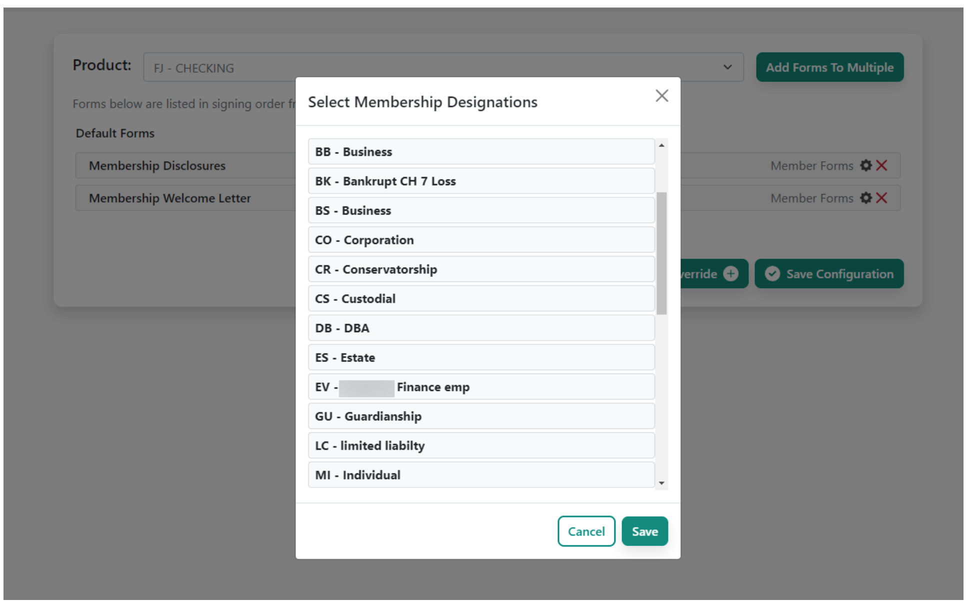
To present a separate set of forms based on a Membership Designation, click *Add Override*.

Presenting a Different Form for Special Membership Designation



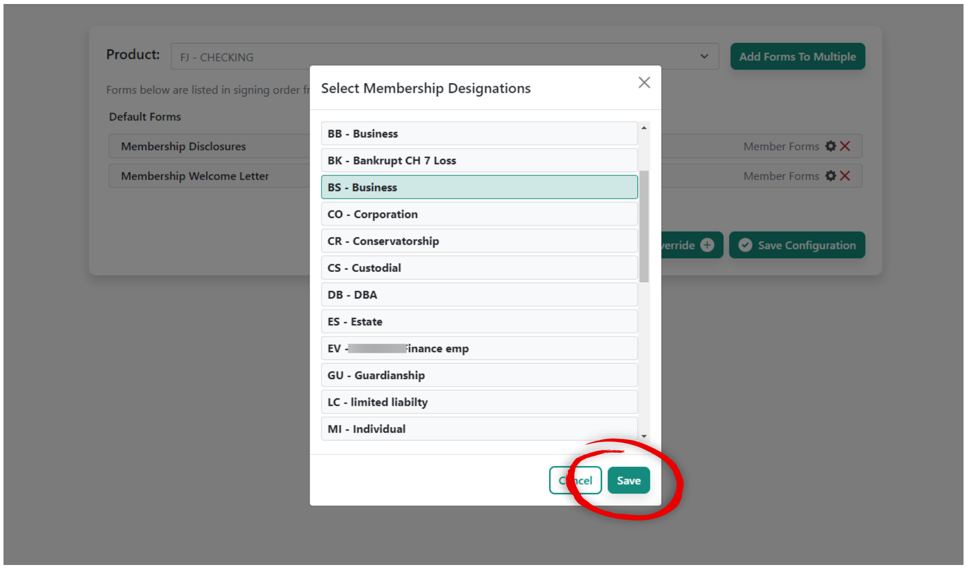
CU*Forms presents your configured Membership Designations.

Configured Memberhip Designations



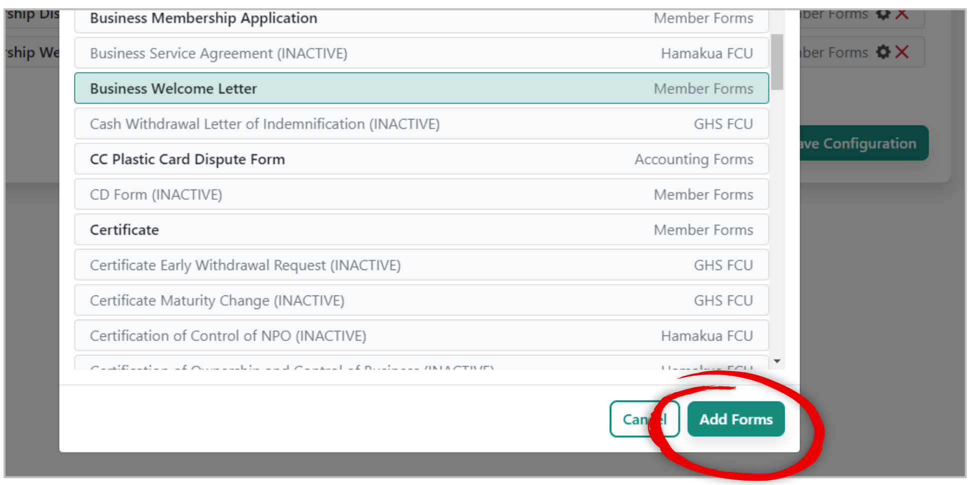
Select the appropriate Membership Designation from the list and *Save*.

Save Selected Designation(s)



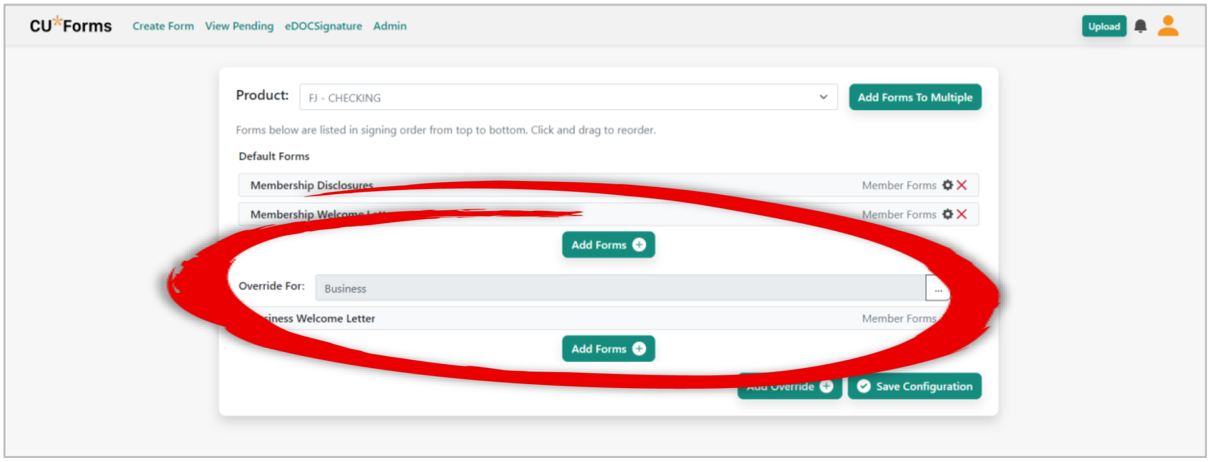
Then, pick the alternate forms for this Membership Designation and click *Add Forms*.

Select Alternative Forms for Membership Designation



The alternate forms will be shown below.

Override Form Added



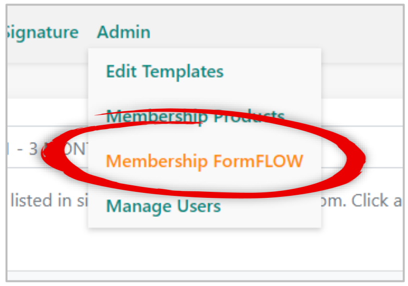
From here, you can also add additonal forms as needed by clicking *Add Form*. When finished, select *Save Configuration*.

Configure Audit Component

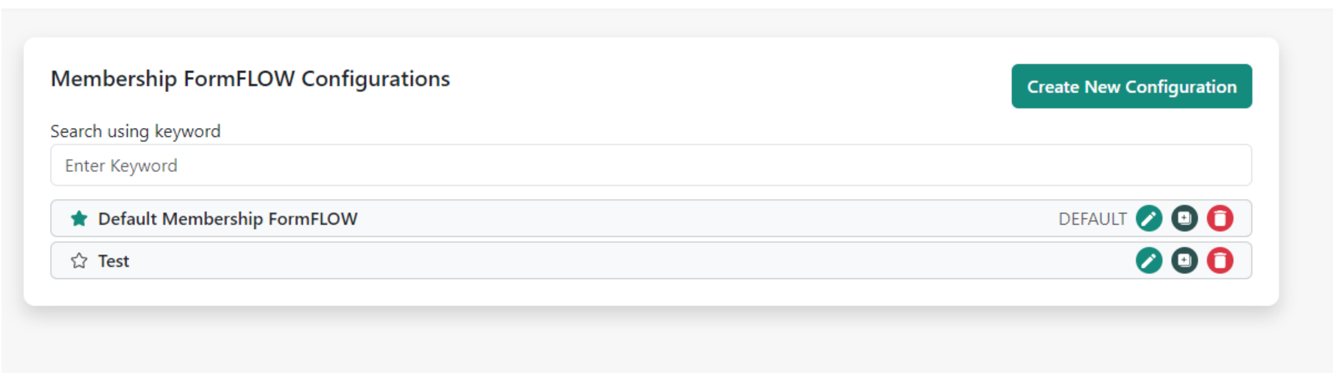
What makes FormFLOW so much more exciting is that it not only presents the appropriate forms at account opening but also provides an auditing feature.

To set up the auditing feature, you will need to configure checklists. To access this section of FormFLOW, select *Membership FormFLOW* from the Admin tab.

Access Membership FormFLOW from Admin

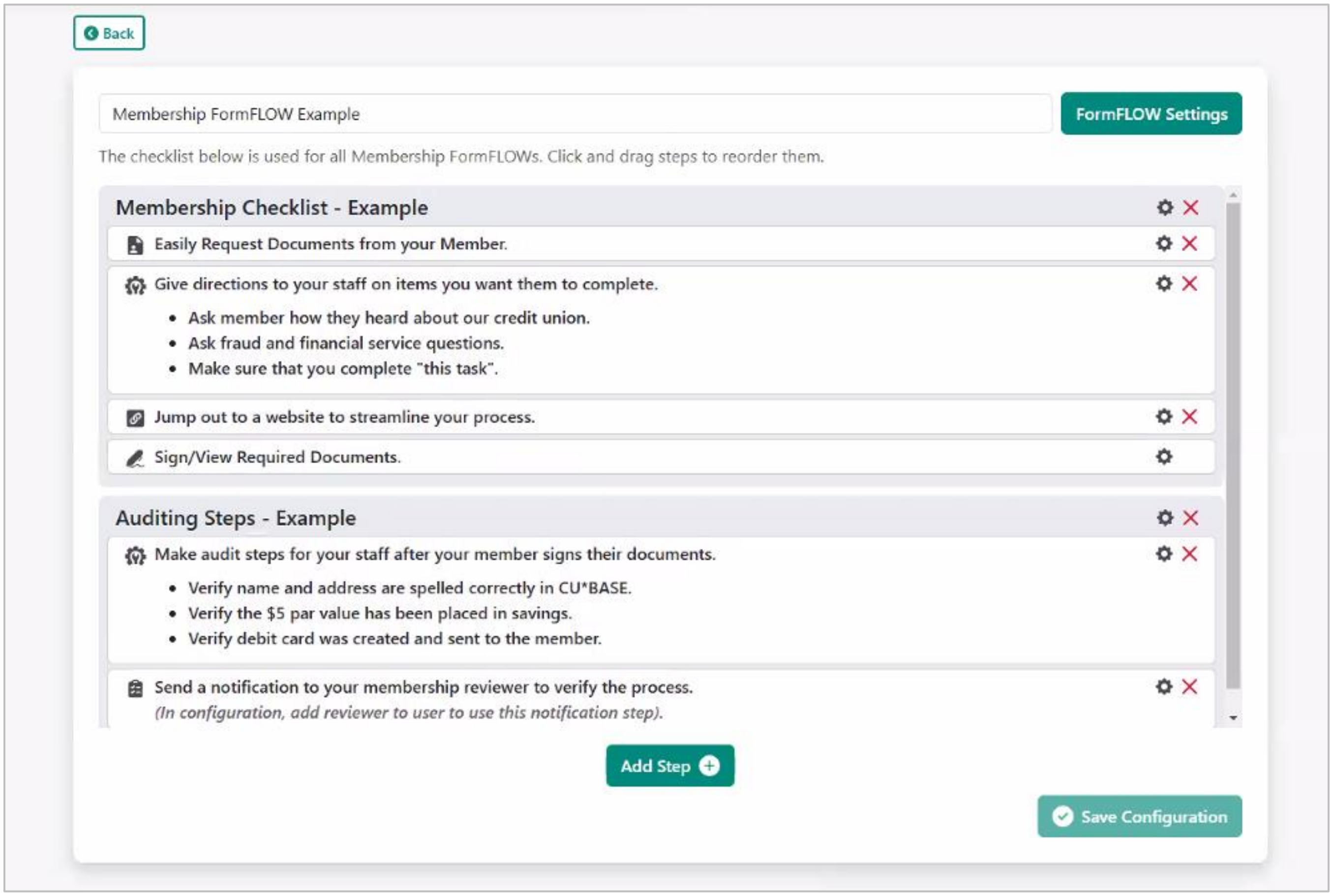


At this point, you can use your default FormFLOW or a new one. A new one might be used for another type of membership, such as a trust that needs a different checklist.



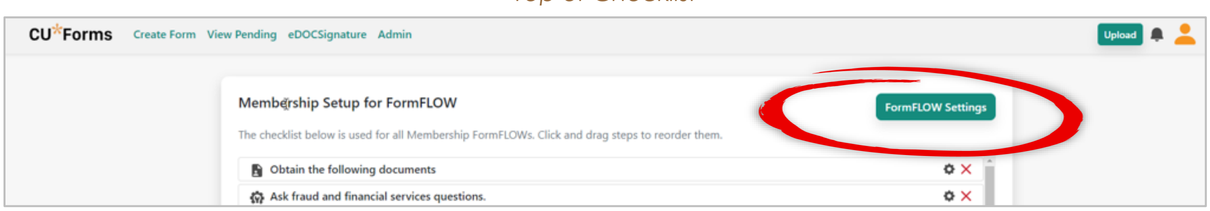
This is what your checklist will look like as a default.

Example of Membership FormFLOW



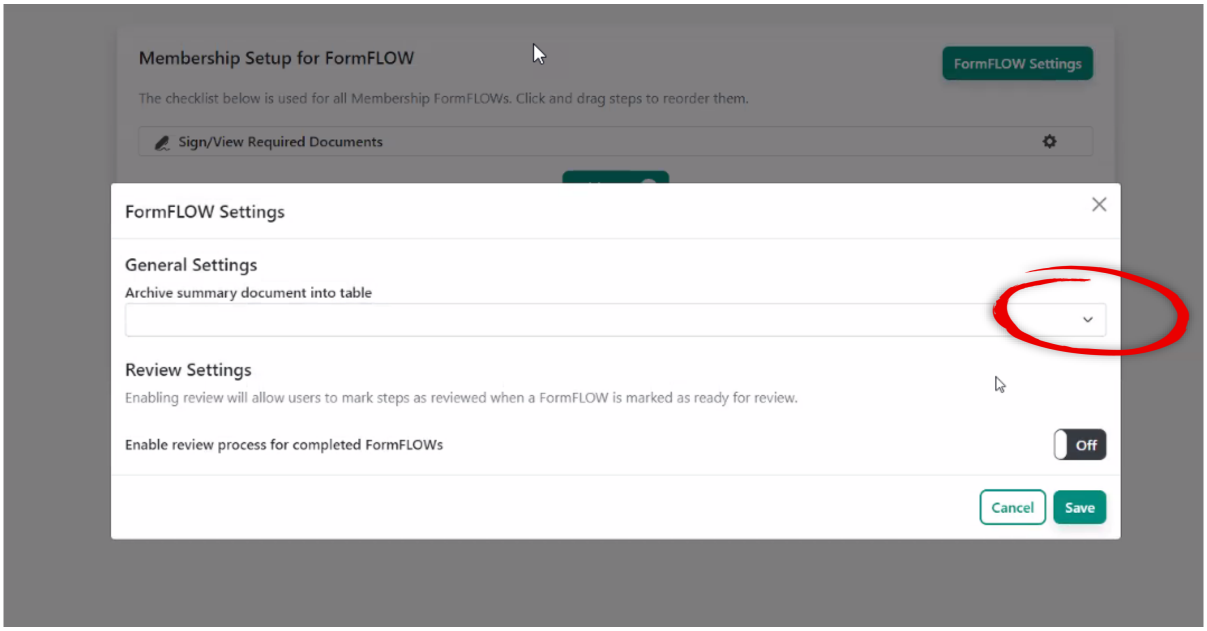
Below is an example of a completed checklist. To archive the checklist after the checklist is completed, click *FormFLOW Settings*. This will determine where your checklist document is saved and also allows you to send a notification to others to review and audit it.

Top of Checklist



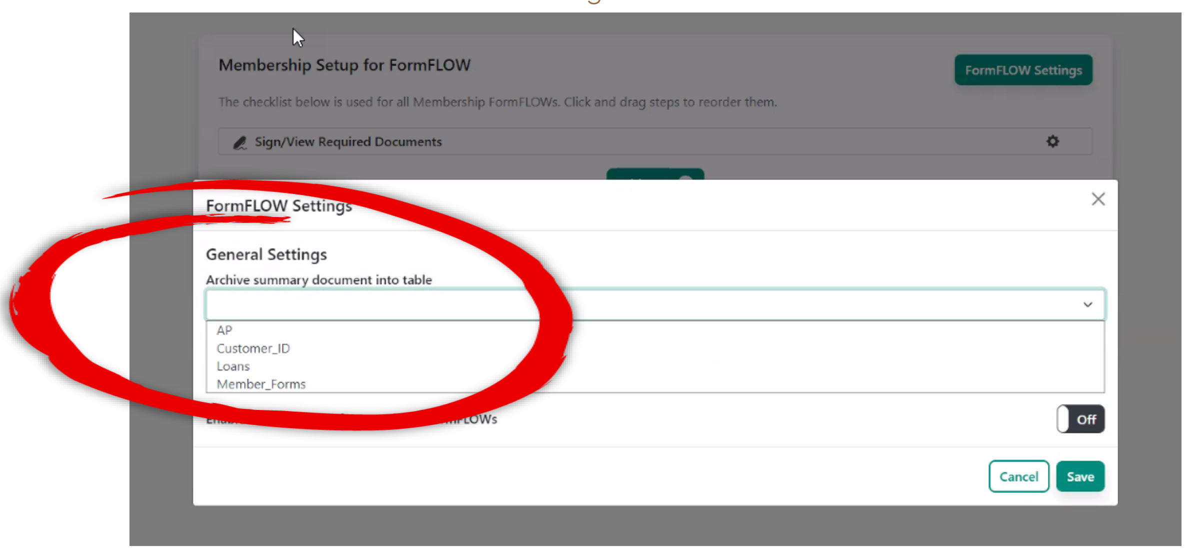
From here, you will enter the screen where you can configure the archive settings. First, select the table into which you want to archive the summary document.

Configuring the Archive Settings



A drop-down window will appear allowing you to select the table.

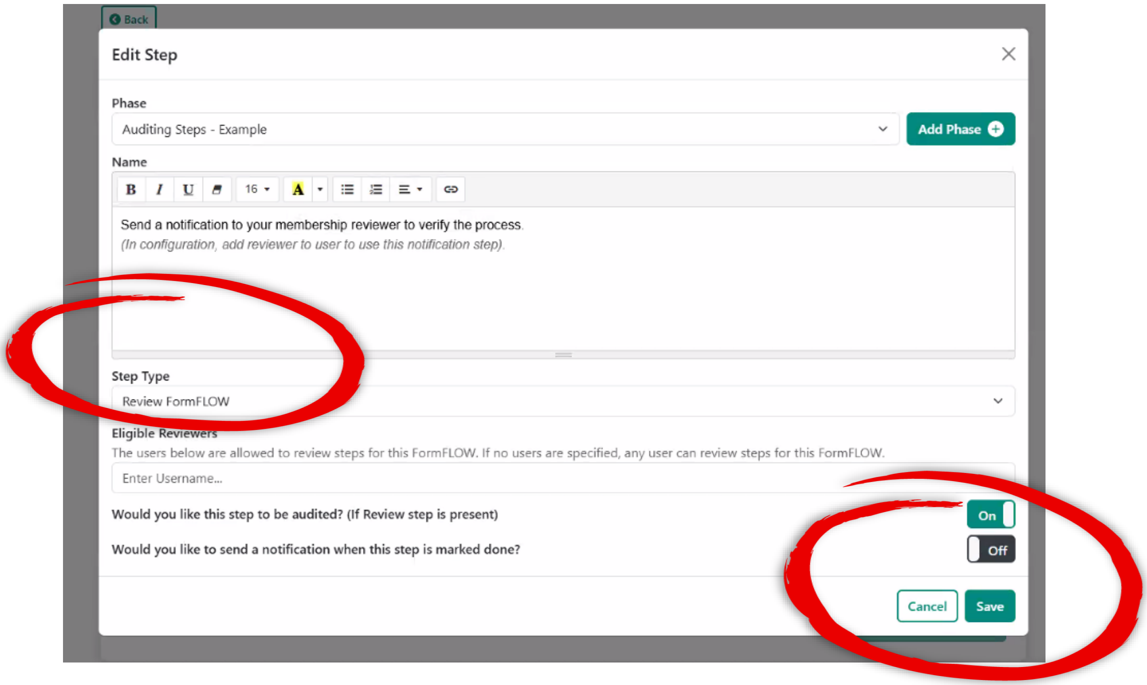
Selecting the Archive Table



Then, you can turn on the settings that allow you to configure any persons who should be notified and the message they will receive. You can also set the step to require an additional task to be reviewed in an auditing function.

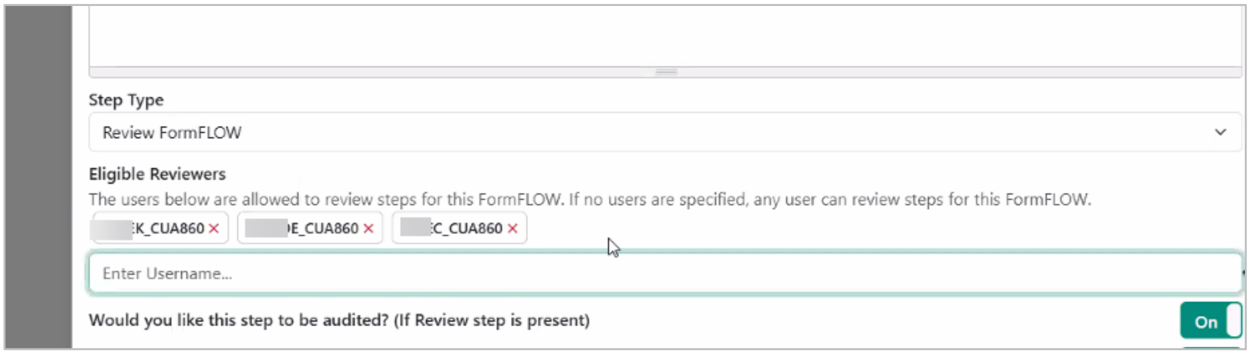
To add reviewers, select the step type *Review FormFLOW*. (See example below.)

Configure FormFLOW Audit Settings (with Reviewers Added)



Add the reviewers.

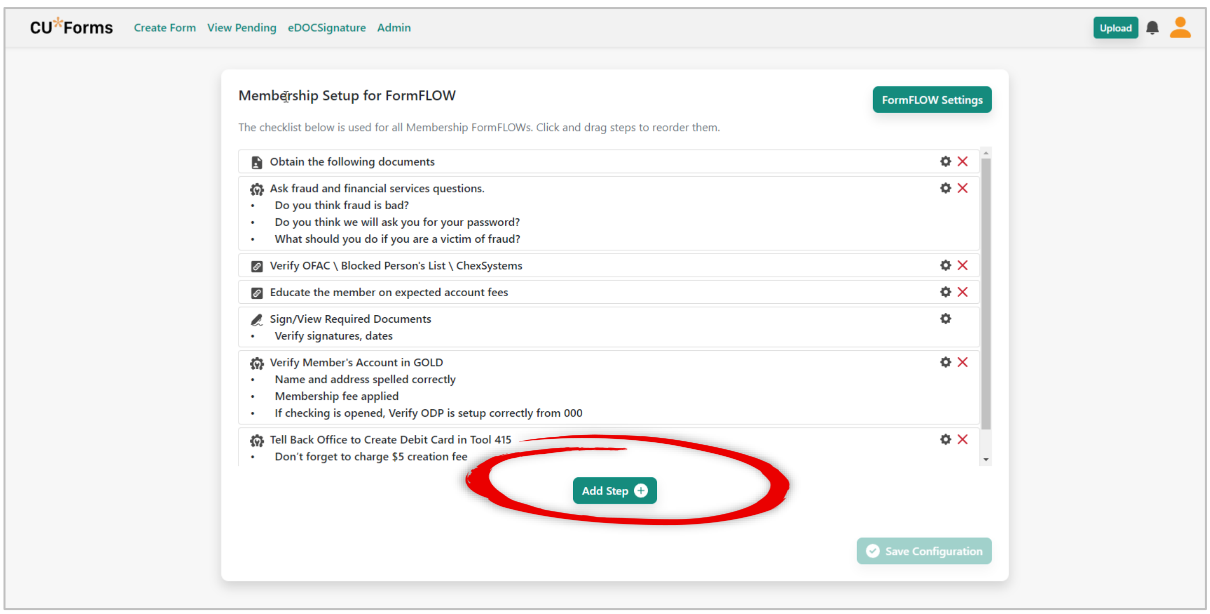
Reviewers Added



Click *Save*. See page 56 for what the reviewer will see.

You will then return to the checklist to complete adding the steps.

Example of Checklist

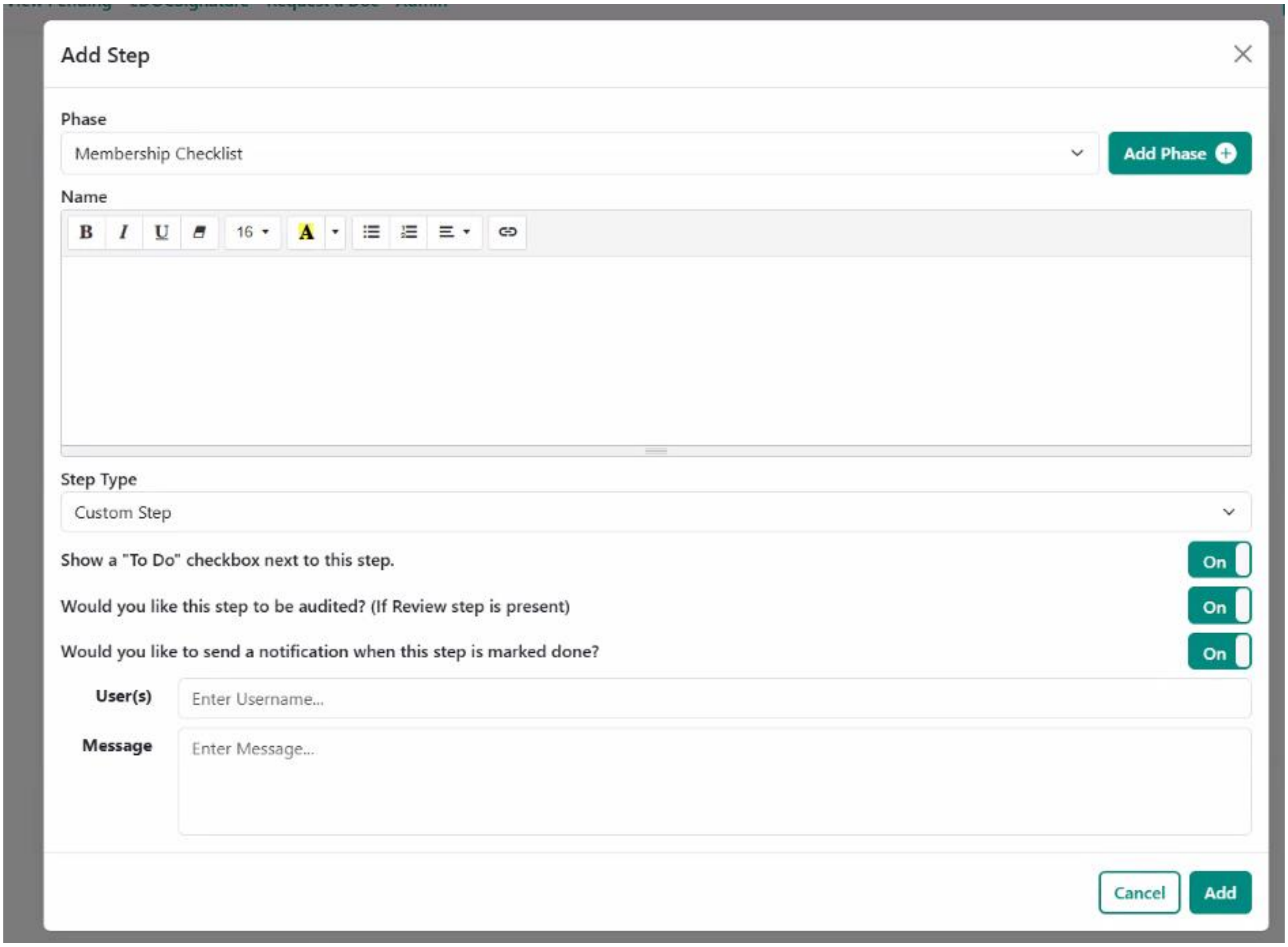


- By default, the *Sign/View Required Documents* is added to all checklists. This gives easy access to sign the forms when filling out the checklist.
- Steps can be reordered by clicking and dragging them up and down on the list.
- Working the checklist is covered starting on page 52.

To add an additional step, click *Add Step*. *(See previous image.)*

A popup window will allow you to define the step. It is blank upon entry, as shown below.

Add Step Window (Blank)



- ▷ From the *Phase* drop-down window, indicate which section of the checklist this step belongs to.
- ▷ Then, describe the step in the *Name* field.
- ▷ Next, select an option from the *Step Type* drop-down menu to indicate what kind of task you are adding. You can add a custom step, request/upload a document, or link to any external website.
- ▷ You can notify users when the step is completed. Add their usernames in the *User(s)* field.
- ▷ Compose the notification they will receive in the *Message* field.

Then, click *Add* to add the step. The step will be added the checklist.

- ▷ As covered earlier, you can click and drag these steps to rearrange the order.

To finalize the checklist, click *Save Configuration*. The button will grey out, indicating the checklist is saved.

Use FormFLOW with Account Opening

Use Configured Forms, Checklists, and Auditing Features

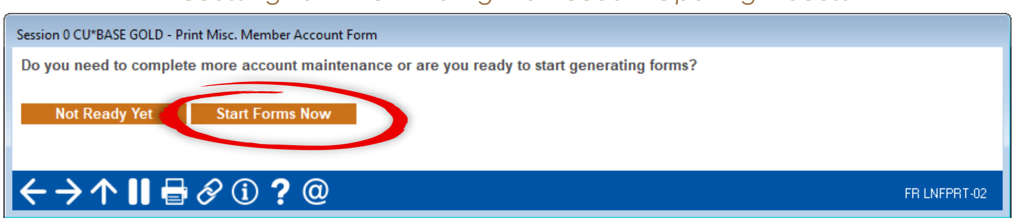
Once you have assigned forms to your products and set up your checklists, your frontline staff can use FormFLOW when opening new suffixes.

▷ See page 40 for connecting forms to your configured products. See page 46 for how to set up your FormFLOW checklists.

Access FormFLOW from Account Opening

As covered in the access section of this booklet on page 6, FormFLOW for account opening is accessed when you click *Start Forms Now* when opening a sub account.

Accessing FormFLOW During the Account Opening Process

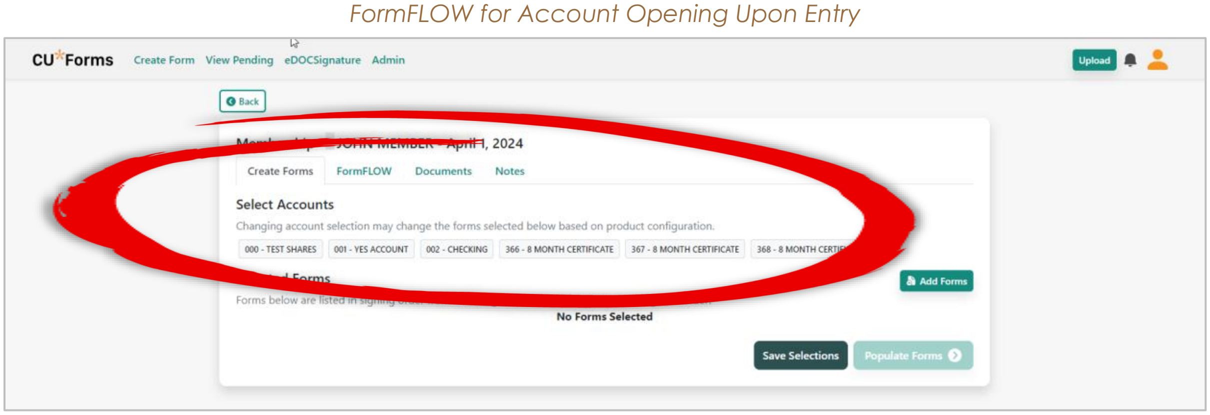


Select Accounts to Reveal Forms

This will then walk you through collecting the data, auditing, signing, and printing of all the forms associated with the sub account.

FormFLOW defaults to the *Create Forms* tab and lists of all the member's sub accounts. Select accounts for which you want to process forms.

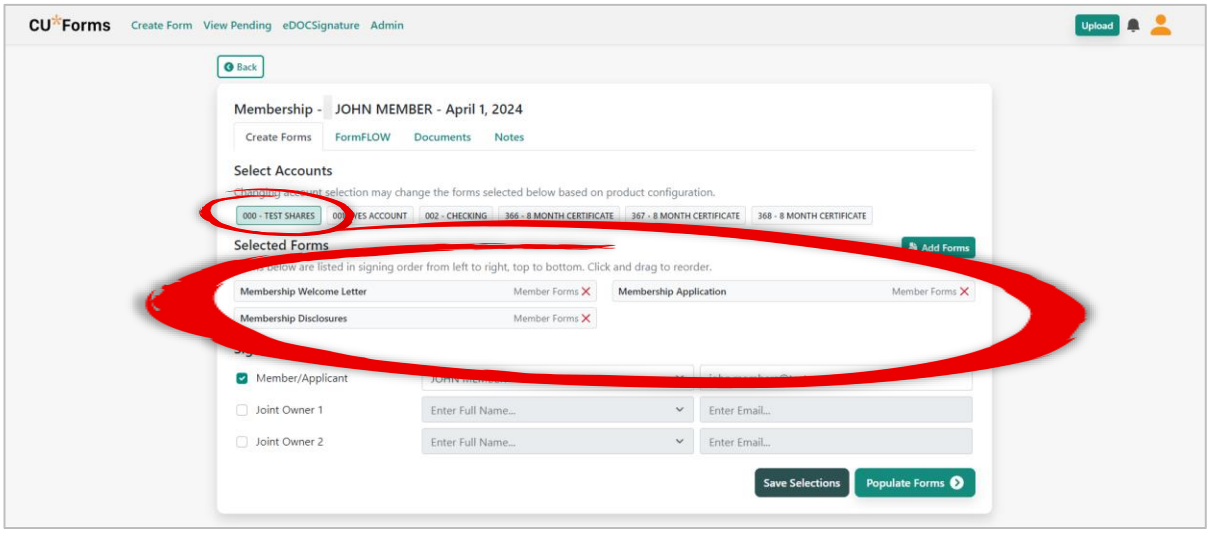
FormFLOW for Account Opening Upon Entry



Selecting accounts will populate the required forms and additional required fields below.

- ▷ In this example, we clicked the *Test Share* sub account, which presented the already configured Membership Welcome Letter, Membership Application, and Membership Disclosure.

Select Sub Account to Reveal Associated Forms

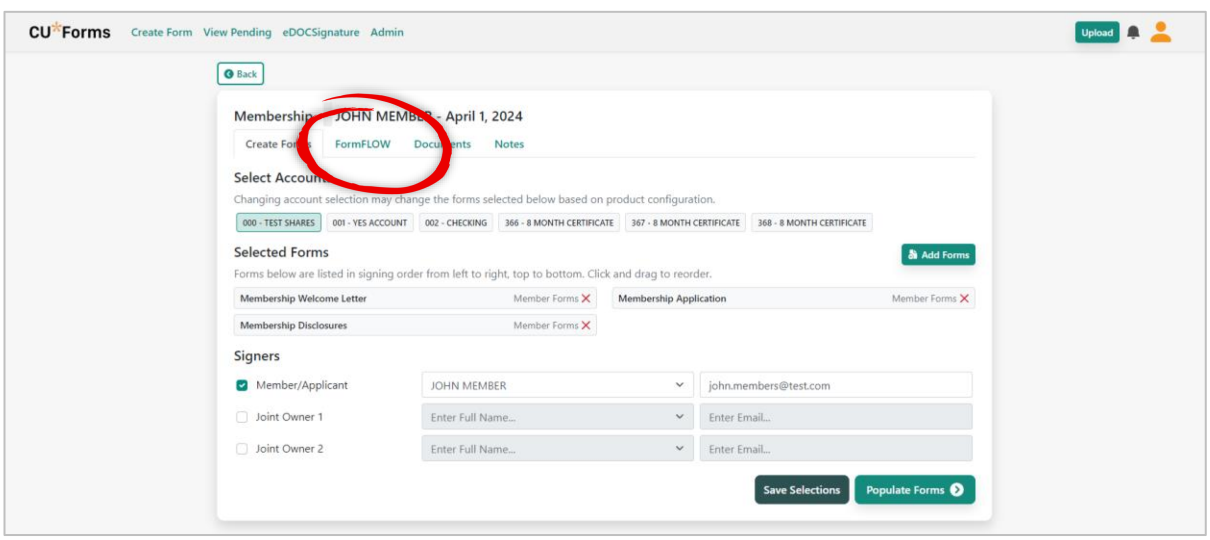


The fields to enter joint owner information are provided below the forms listing.

- ▷ NOTE: Any information entered in these fields will not be sent back to the CU*BASE. This data set is only used when filling in the forms.

Next, click the *FormFLOW* tab. This will advance you to the auditing checklist you have configured in the previous step.

Enter Checklist

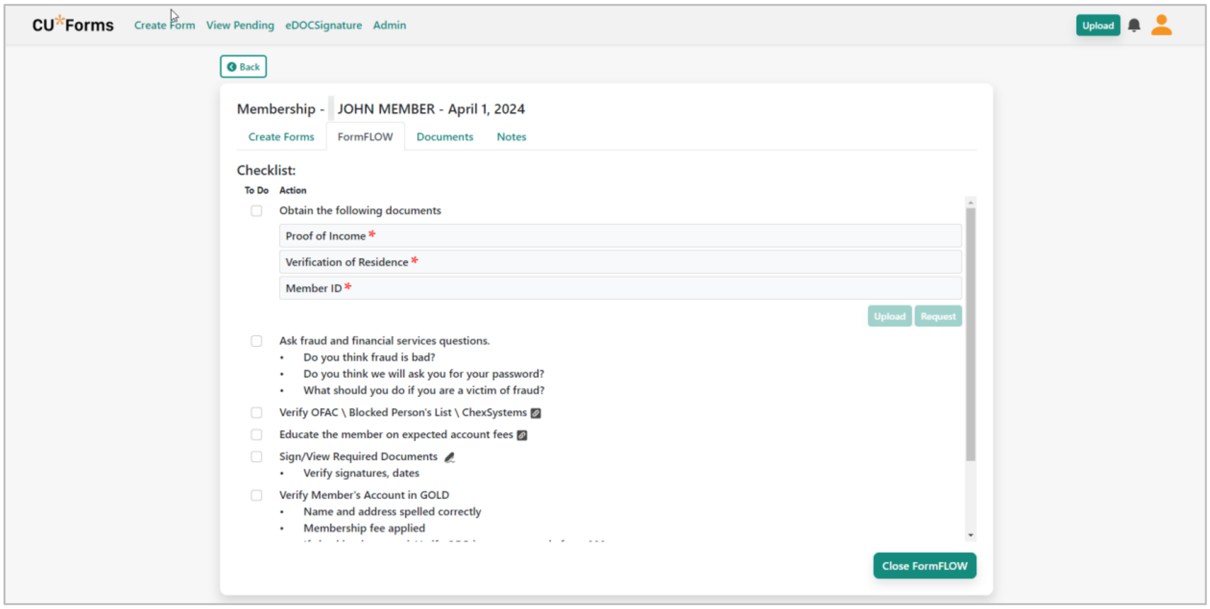


Work FormFLOW Checklist

Below is an example of a completed auditing checklist.

- ▷ The process to configure these checklists is covered on page 54.

Auditing Checklist for FormFLOW Example



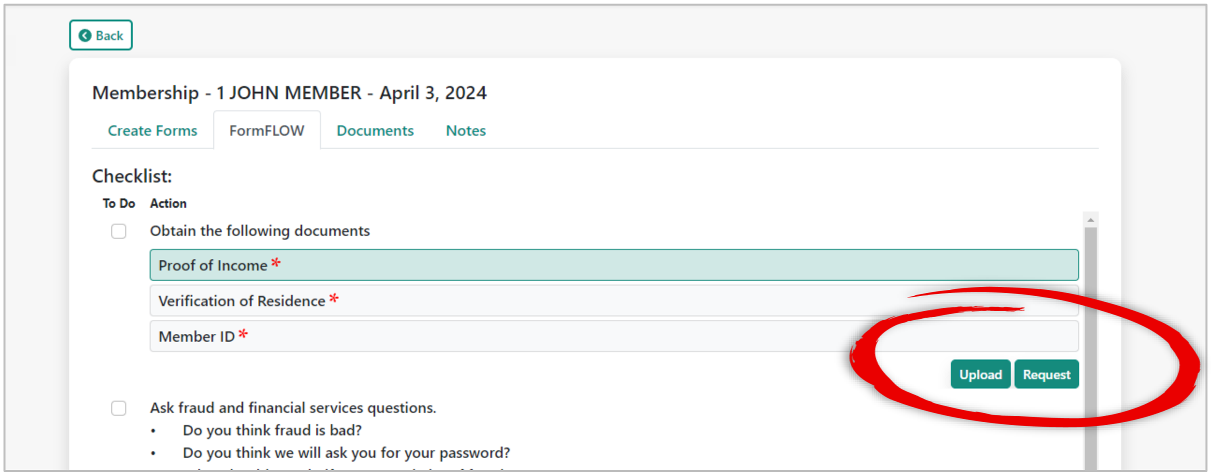
From the checklist, your employee can work the steps required for the account opening processes, including:

- ▷ Access signing the forms attached to the checklist (by using the *Sign/View Required Documents* step).
- ▷ Request documents from a member.
- ▷ Upload and archive documents provided by the member.
- ▷ Check off tasks required by the account opening process to verify they are completed.
- ▷ Check off tasks to indicate the tasks have been reviewed.
- ▷ Access external websites for additional information.

Request Form or Upload Document

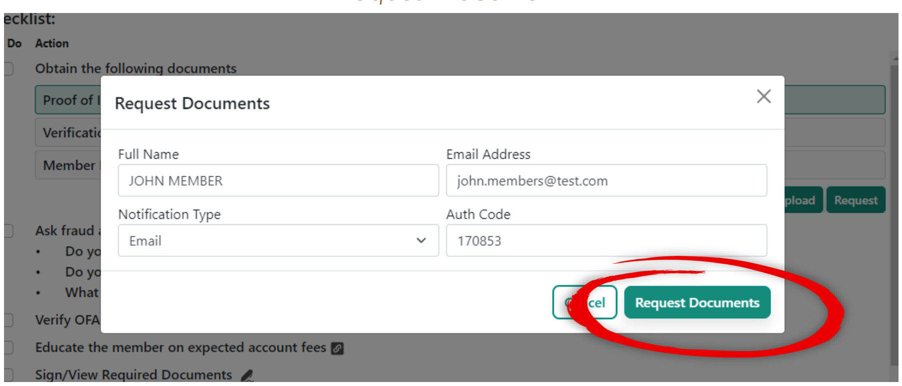
To request or upload a document, select the document from the list and select the appropriate option.

Document Collection



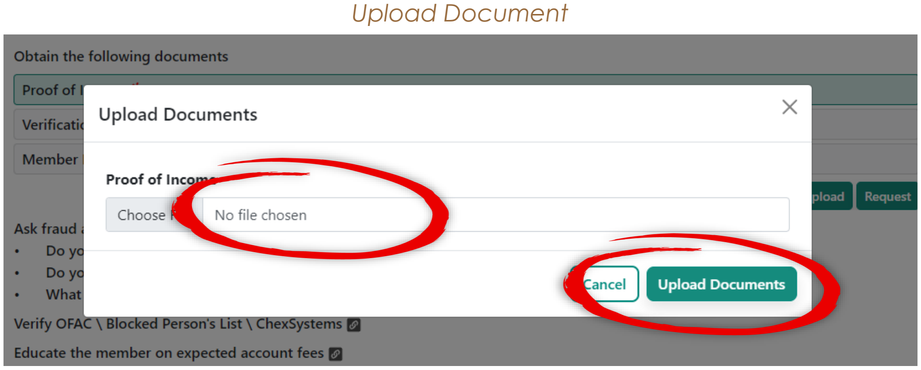
The screen below will appear when you request a document. Enter the member's information, choose the notification type, and click *Request Documents.*

Request Document



The screen below will appear when you upload a document. Click *Choose File* to select a file and then click *Upload Documents.*

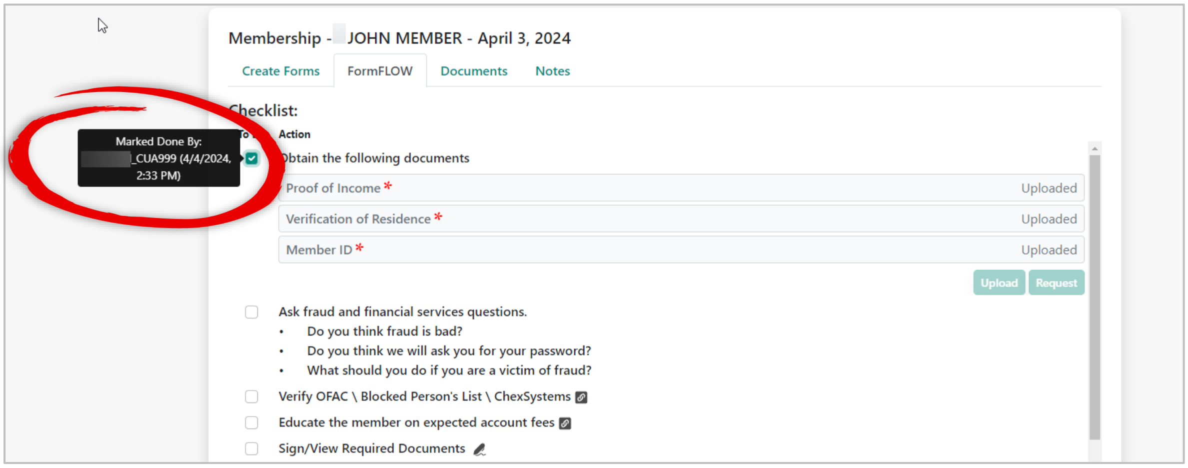
Upload Document



Complete and Review Tasks

When a task is completed, check the box in front of it. Each completed step is date stamped with the designated employee who has completed the task. This information also appears on the auditing report that is created upon the completion of the checklist.

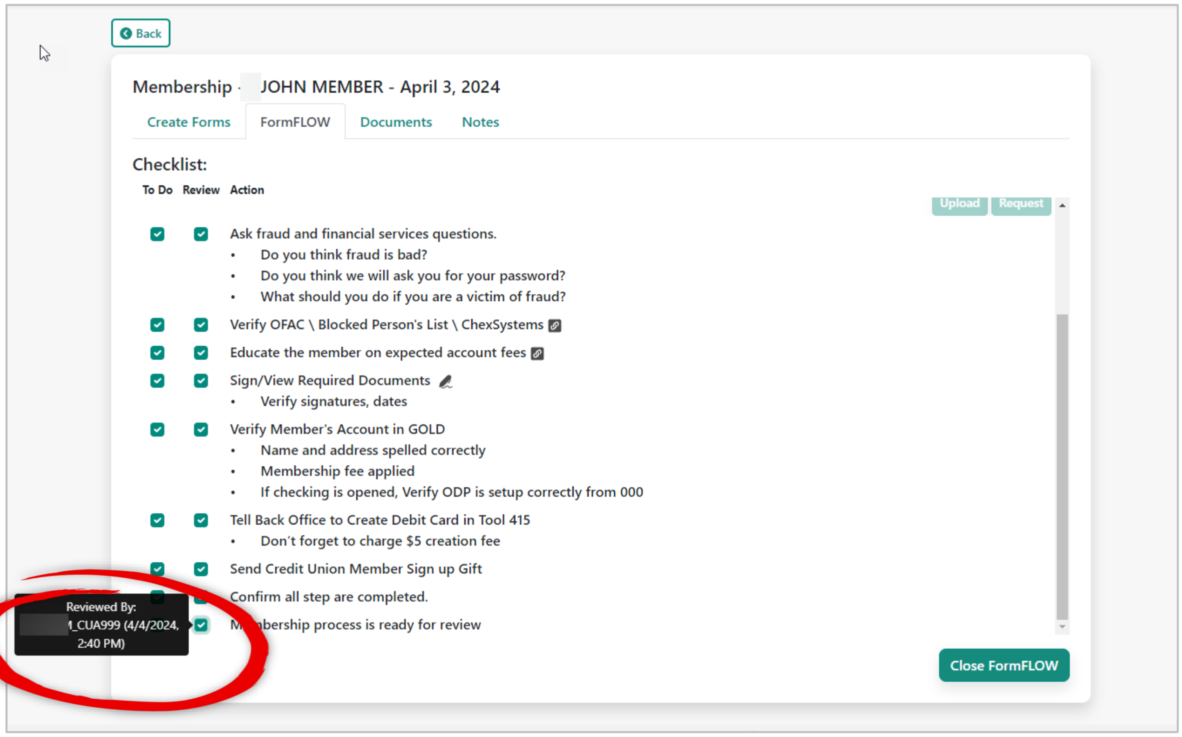
Task Marked Completed



- If the task has a completion notification associated with it, a notification will be sent to the configured persons when the task is checked as complete. (Notification is set up in the configuration of the task. See page 46.) The notification will appear as a bell icon in the top right corner of the CU*Forms screen.

These people can go in and check that the tasks are reviewed. (See page 49 for information on adding reviewers to a checklist.)

Task Reviewed



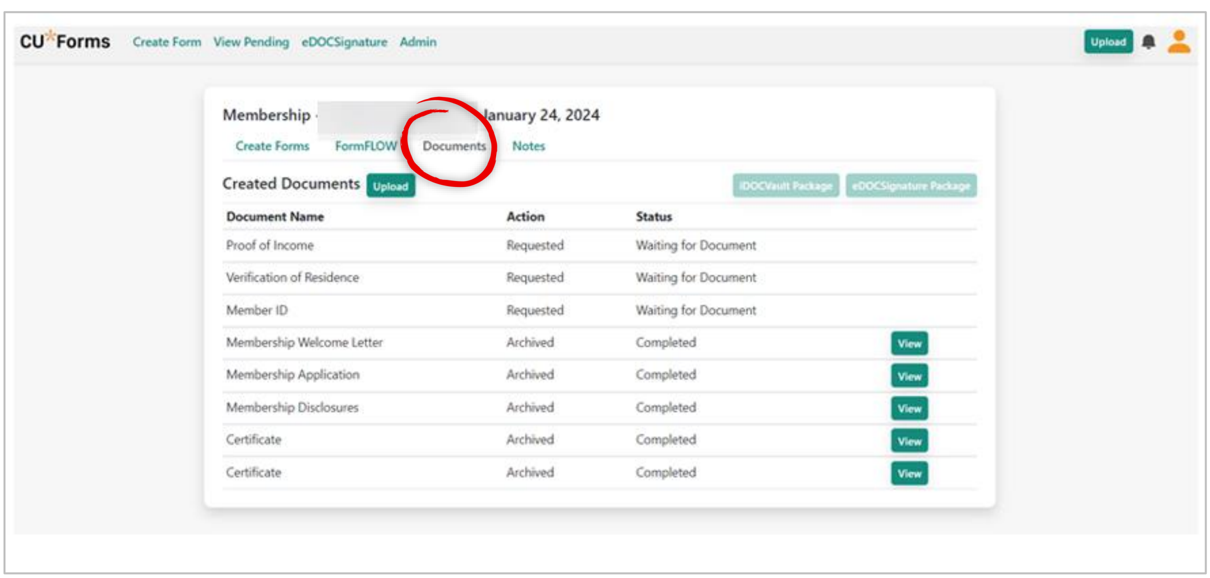
Additional Activities in FormFLOW

Before you archive the FormFLOW, you can perform additional activities on separate tabs.

View Uploaded Documents and Document Status

Click the *Documents* tab to view the documents attached with this FormFLOW and their status. View and manage documents from iDocVAULT and eDOCSignature all in one place.

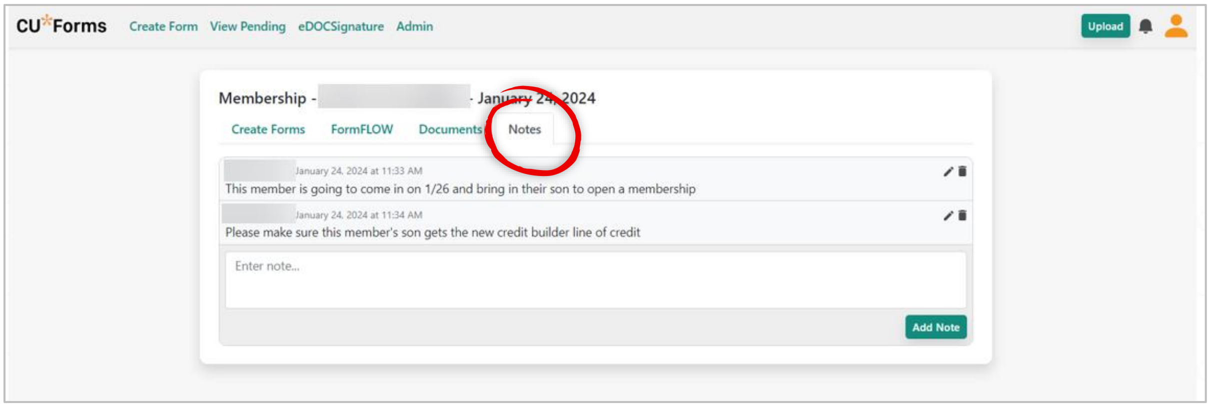
Documents Tab



Add Additional Notes

Click the *Notes* tab to add notes.

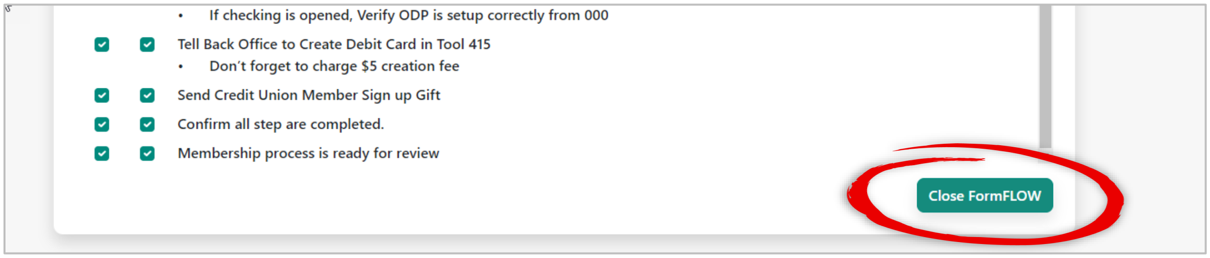
Notes Tab



Archive and Create Summary Document

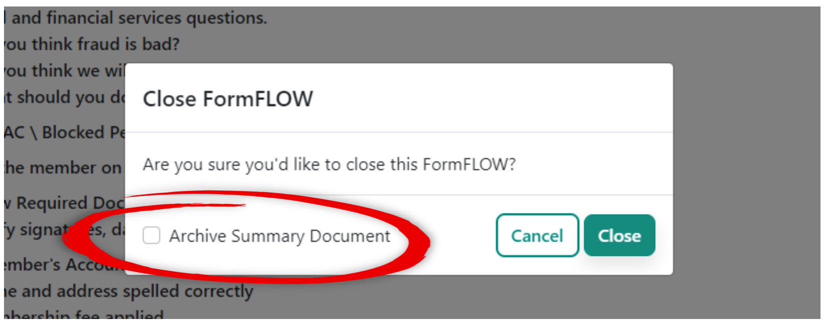
Once the last task (or activity) on the checklist is completed, click *Close FromFLOW*.

Exit FormFLOW



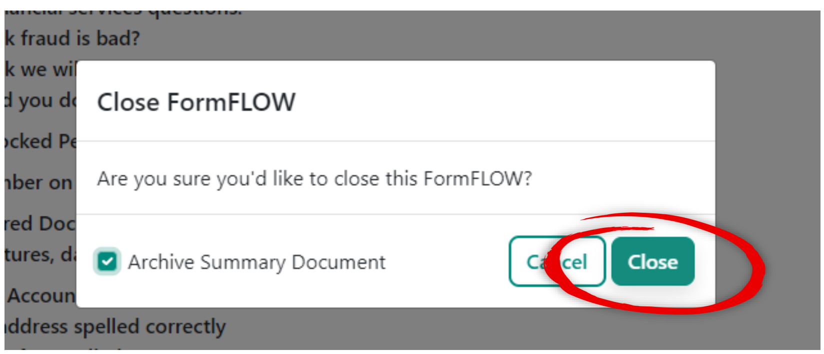
Check *Archive Summary Document*.

Select Archive Summary Document



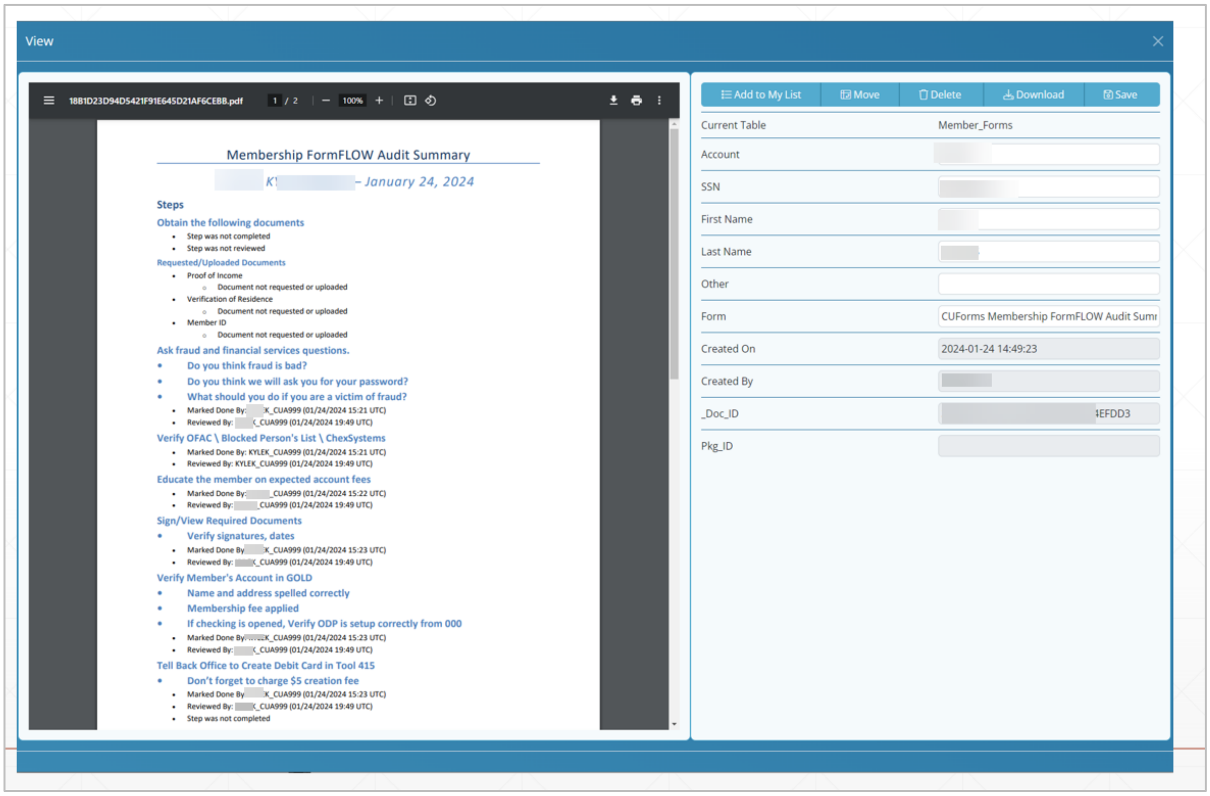
Click *Close*.

Close FormFLOW



Below is an example of an archived summary document.

Summary Report Example



Manage Users

Admin Permissions Versus Default Permissions

All Permissions Assigned Versus Default Permissions

CU*Forms allows you to set permissions for users to give them access to unique features. Below, the user has all permissions assigned. (All permissions are documented in the table below.)

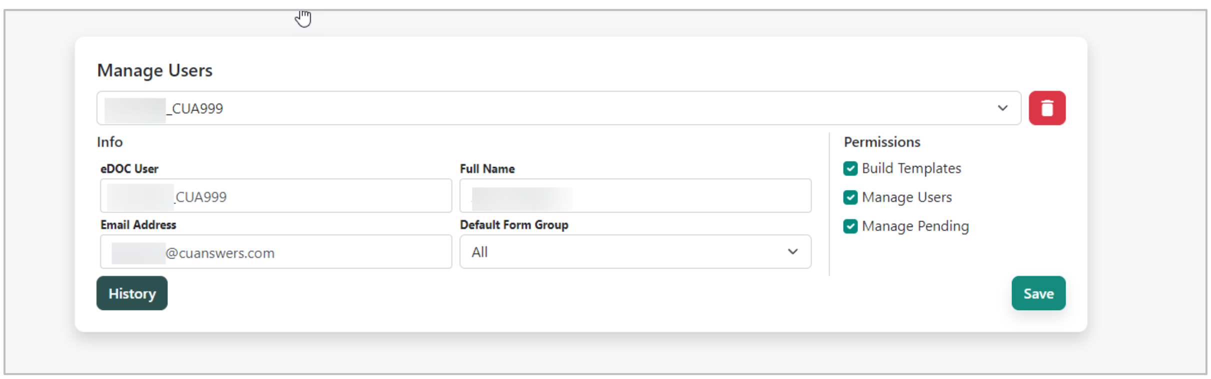
User with All Permissions Assigned

Default users are created on the fly when new users access CU*Forms. These users only have *Create Form* and *View Pending* permissions. (They will also have access to eSignature if configured.)

Adjust Permissions for Admin User

To adjust the permissions assigned to your credit union staff, click *Admin* and then *Manage Users*. (If you do not have this access, you will not be able to change permissions.)

Manage Users Selected



The following permissions can be granted:

Permissions

Field	*Description*
Build Templates	Users can build new templates and mark templates as active. They can also deactivate templates.
Manage Users	This permission allows a user to define users' permissions.

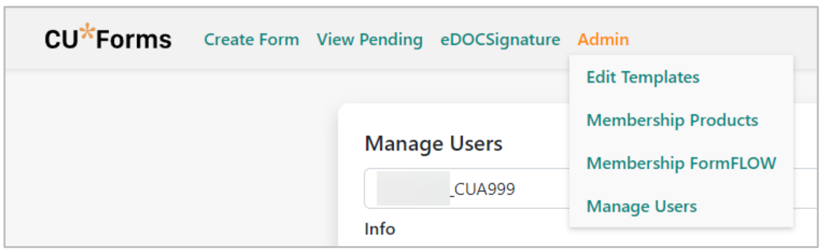
Field	Description
Manage Pending	This permission allows the user to create new pending areas and delete current ones.

Access FormFLOW Configuration Area

The FormFLOW region of CU*Forms allows you to print all your forms sequentially and package them together (for example, when opening sub accounts). In addition to printing all the forms, this system automates the auditing and notification processes required for form signing.

Additionally, if FormFLOW is activated for your credit union, the Administrator users will have *Membership Products* and *Membership FormFLOW* in their Admin drop-down menu.

Admin Permsisions with FormFlow Activated



▷ Learn more about FormFLOW on page 40.

Frequently Asked Questions

Questions Asked about CU*Forms

The following are questions commonly asked about CU*Forms.

How do I activate CU*Forms?

To activate CU*Forms, access the store page devoted to the product: https://store.cuanswers.com/product/cuforms/.

How do I access CU*Forms?

You access CU*Forms from the Time-Out Window, which is accessed by using the Escape key from any CU*BASE screen.

Is CU*Forms included in my other services from the Imaging team?

CU*Forms is included in the Imaging Solutions Enhanced Online Vault or if you subscribe to release management for your In-House Vault.

How many forms can I create in CU*Forms?

You can create an unlimited number of forms with CU*Forms.

What is a template? What is the procedure for creating one?

A template allows you to map fields to pull pre-defined CU*BASE data into the form when it is created. The process for creating a template is covered on page 16.

How many data points from CU*BASE can be populated into a form?

Over 250 data points from CU*BASE can be populated into a CU*Form.

Once I program a template, is it available right away?

You must mark a template as active for it to be available to all your employees to create as a form.

Can all users see all the forms?

Once a form is marked active, every user at your credit union will have access to the form.

How do I mark a form as inactive? What does that status mean?

If you edit the form, you will see an *Activate Form* check box. If you uncheck this box, you are marking the form as inactive. It will appear in the listing, but default users cannot select it to create a form. (NOTE: Users with access to create templates can select it to create forms for testing.)

How do I populate the data of a beneficiary?

There are special fields designed to assist with the population of beneficiary information. See page 25 to learn more.

Can an employee have a member sign a form in branch and also send it out via eSign to a joint owner?

Yes, you can have the member sign a form in branch and send the same form out for eSigning. Both features are available with CU*Forms.

What is the Pending area used for?

You may save an incomplete form in the pending area.

What are the permissions assigned to users?

When a new user accesses CU*Forms, they are given the default permissions, which allow them to create a form and use the pending area.

The following permissions can be granted to a user: build templates (allows the user to create templates, the basis of forms), manage users (allows the user to change their permissions), and manage pending (allows the user to create and delete sub folders in the pending area).

Where are the completed and saved forms archived?

Archived forms are stored in idocVAULT.

What determines which field I advance to next when filling out a form?

CU*Forms advances to the next field on the page vertically. If one field is slightly higher than another on the form, it will advance to that field before the lower one.

Does CU*Forms allow me to manually add additional fields to the template?

Yes, you can add check boxes, text fields, signature fields, and more to the template. See page 27.

Is it best practice to set up the PDF with fields prior to import?

It is not necessary to set up the PDF with fields prior to import, but it certainly will speed up your creation of a new template and the subsequent mapping to the CU*BASE fields.