

CU*Forms

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

Revised: October 4, 2023

Creating general membership 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. The template creator has access to over 150 CU*BASE data points for general membership data like account, 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 as well.

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

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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 on the CU*Answers Online store page:
<https://store.cuanswers.com/product/cuforms/>. There is a one-time \$250 setup fee.

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 demos of the following:

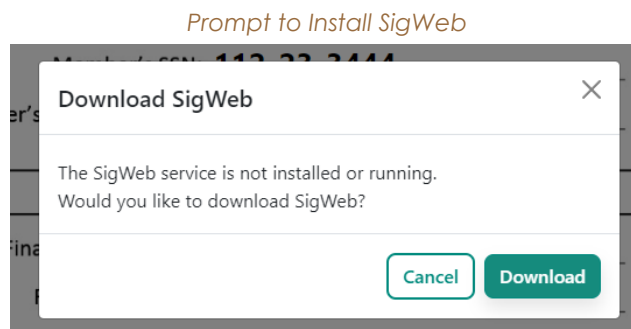
- ▷ How to use and sign a form
- ▷ How to build a template

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. Sigweb is 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.



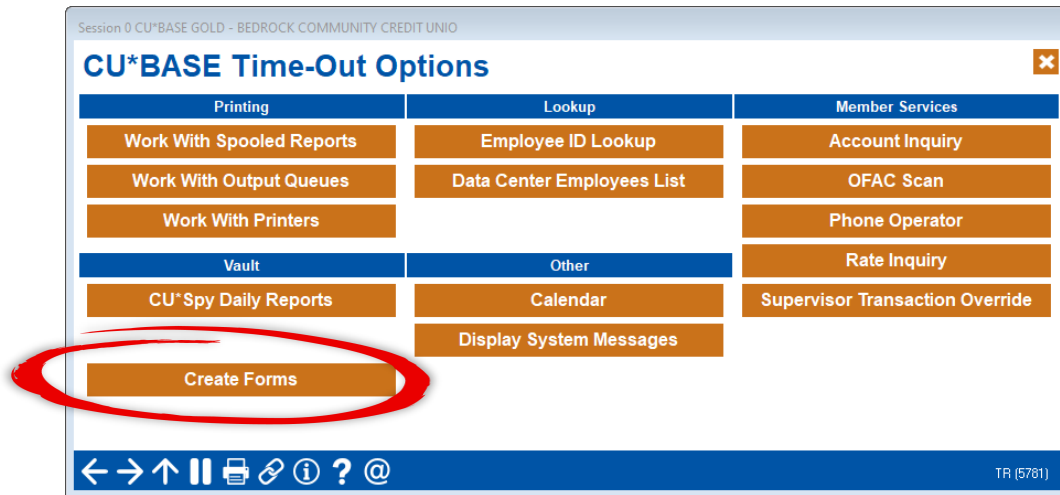
Simply select the download button to download and install SigWeb. You will require administrative permissions to install this software.

Accessing CU*Forms

Getting into the Software

To access the **CU*Forms** feature, click the *Create Forms* button on the CU*BASE Timeout Window. Access the Timeout Window by clicking the Escape key from the from any CU*BASE screen.

*Access CU*Forms from the Timeout Window*

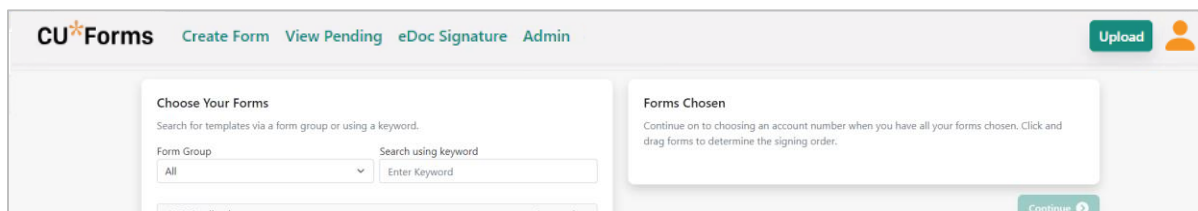


- ▷ If you are not set up with **CU*Forms**, you will be redirected to the store page to sign up for the feature.

Once you click *Create Forms*, a web browser will open allowing you to add new templates and populate already created 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.

Filling in a Form

And Sending it to a 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, and saving and printing the form.

- ▷ For information on creating a template, refer to the next section "Building a Template" on page 13.
- ▷ For information on adding the form to the pending area, see page 27.

Selecting a Form

The entry screen lists the categories of forms available in **CU*Forms**. Any marked as Inactive are not available.

Begin by Selecting an Active Form

The screenshot shows the CU*Forms web interface. At the top, there are navigation links: "CU*Forms", "Create Form", "View Pending", "eDoc Signature", and "Admin". On the right, there is an "Upload" button and a user icon. The main content area is titled "Choose Your Forms" and includes a search bar with a dropdown menu set to "All" and a text input field for "Search using keyword". Below the search bar, there is a list of forms organized by category. The categories are "ACC Application", "Account Card", "CC Agreement", "Debit Card Dispute Form", "Indirect Welcome Letter", "Membership Agreement", and "Membership Application". The "Membership Application" form is highlighted with a red circle. To the right of the list, there is a "Forms Chosen" section with instructions: "Continue on to choosing an account number when you have all your forms chosen. Click and drag forms to determine the signing order." and a "Continue" button.

Form Group	Search using keyword
All	Enter Keyword

Form Group	Search using keyword
ACC Application	Accounting
Account Card (INACTIVE)	Member Forms
Account Card (INACTIVE)	Accounting
Account Card 3 (INACTIVE)	Member Forms
Account Card Test today (INACTIVE)	Member Forms
Account Card Today (INACTIVE)	Member Forms
CC Agreement	Lending
Debit Card Dispute Form	Member Forms
Indirect Welcome Letter	Member Forms
Membership Agreement (INACTIVE)	Member Forms
Membership Application	Member Forms

Forms Chosen

Continue on to choosing an account number when you have all your forms chosen. Click and drag forms to determine the signing order.

Continue

To select a form, click on it from the list on the left, and it will appear in the listing to the right.

Select the Form

The screenshot shows the 'CU*Forms' interface with the 'Choose Your Forms' section. A list of forms is displayed, including 'ACC Application', 'Account Card (INACTIVE)', 'Account Card 3 (INACTIVE)', 'Account Card Test today (INACTIVE)', 'Account Card Today (INACTIVE)', 'CC Agreement', 'Debit Card Dispute Form', 'Indirect Welcome Letter', 'Membership Agreement (INACTIVE)', and 'Membership Application'. The 'Membership Application' form is selected and highlighted with a red circle. The 'Continue' button is also highlighted with a red circle.

Click *Continue*.

Completing the Form and Importing the Member Data

If the form has been programmed to accept CU*BASE data, the system will ask for the account base. That way you can designate what membership data will be populated on the form.

Enter the Account Base to Populate the Form

The screenshot shows the 'CU*Forms' interface with the 'Account Number' section. The 'Membership Application' form is selected. The 'Account Base' field is highlighted with a red circle.

Enter your account base.

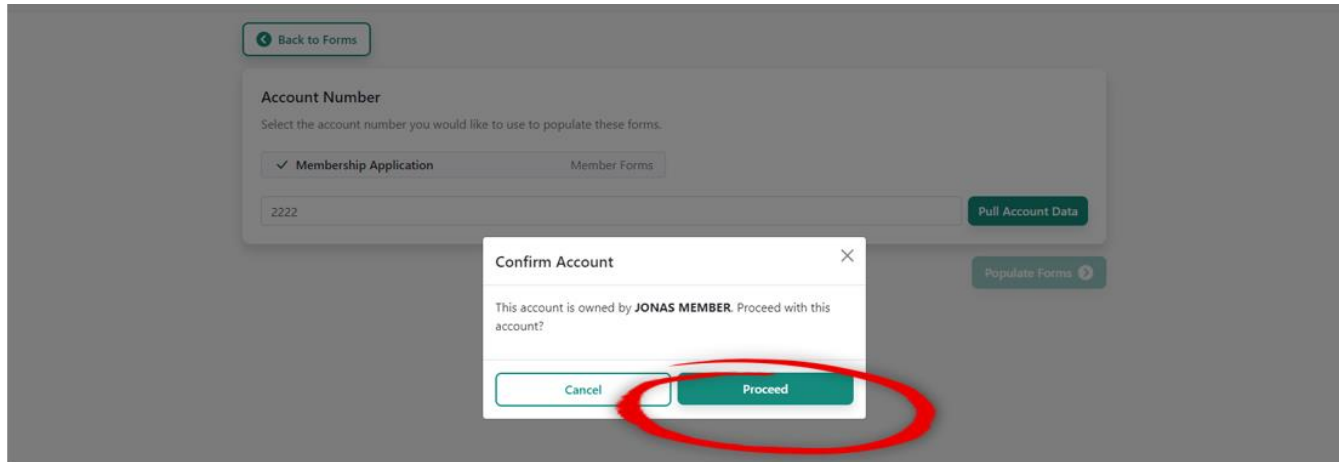
Pull the Data into the Form

The screenshot shows the 'CU*Forms' interface with the 'Account Number' section. The 'Membership Application' form is selected. The 'Pull Account Data' button is highlighted with a red circle.

Click *Pull Account Data*.

A confirmation window will appear showing the member name.

Confirm the Member Name

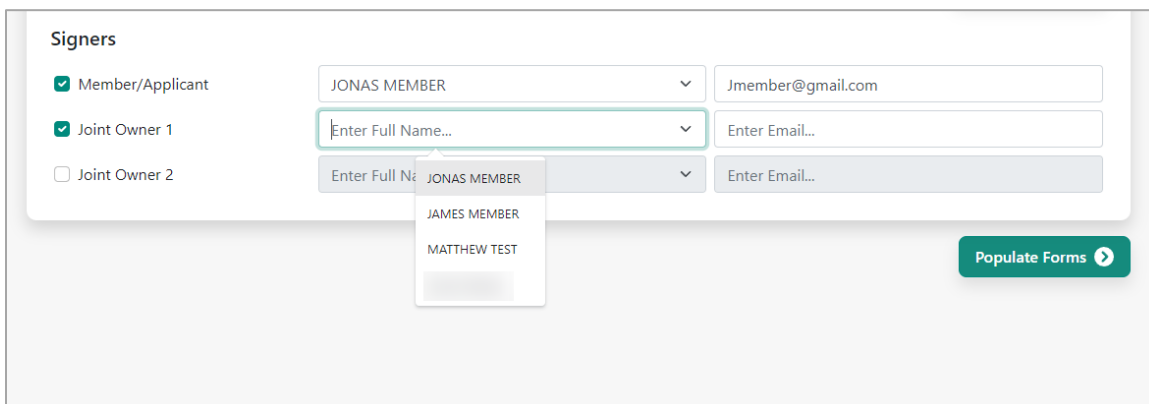


Confirm the correct member was selected by clicking *Proceed*.

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 Listing



▷ 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

The screenshot shows the CU*Forms interface. At the top, there are navigation links: 'CU*Forms', 'Create Form', 'View Pending', 'eDoc Signature', and 'Admin'. On the right, there is an 'Upload' button and a user profile icon. Below the navigation bar, there is a 'Back to Forms' button. The main content area is divided into two sections: 'Account Number' and 'Signers'. In the 'Account Number' section, there is a dropdown menu with 'Membership Application' selected, a text input field containing '2222', and a 'Pull Account Data' button. In the 'Signers' section, there are three rows, each with a checkbox, a name, a dropdown menu, and an email address input field. The first row is for 'Member/Applicant' with the name 'JONAS MEMBER' and email 'Jmember@gmail.com'. The second row is for 'Joint Owner 1' with the name 'JONAS MEMBER' and email 'Jmember@gmail.com'. The third row is for 'Joint Owner 2' with the name 'JAMES MEMBER' and a placeholder 'Enter Email...'. A red circle highlights the email address input fields for the first two signers.

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

*Populate the Form with Data from CU*BASE*

The screenshot shows the CU*Forms interface, similar to the previous one. In the 'Signers' section, the email address for 'Joint Owner 2' is now 'JamesMember@gmail.com'. A red circle highlights the 'Populate Forms' button at the bottom right of the form.

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

The populated data appears in **CU*Forms** where the fields are mapped. (See next section on building the template.)

*Member and Joint Owner Data Pulled from CU*BASE Populate the Form Where Fields are Mapped*

CU*Forms Create Form View Pending eDoc Signature Admin Upload

Back Send to Member Edit Indexes Add Field Pend Form Sign Forms Print E-Sign Save / Done

CU*ANSWERS Imaging Solutions **Online Membership Application**

Primary Account Holder Information **Membership Number:**

Member/Owner Name: JONAS MEMBER	SSN/TIN: 112-23-3444
Street: 234 EASY WAY	DOB: 06/06/1955
City/State/Zip: ANYCITY, MI 48999	ID Number 12
Personal Email: Jmember@gmail.com	ID Issuing State: WY
Cell Phone:	
Other Phone: (605) 555-2222	Employer: RY

Joint Account Holder Information

JONAS MEMBER Joint Owner 1 Name	112-23-3444 Joint Owner 1 SSN	JAMES MEMBER Joint Owner 2 Name	 Joint Owner 2 SSN
234 EASY WAY Street		123 MAIN STREET Street	
ANYCITY, MI 48999 City/State/Zip		ANYCITY, MI 49000 City/State/Zip	
06/06/1955 Date of Birth	(605) 555-2222 Phone Number	01/01/1963 Date of Birth	 Phone Number
Jmember@gmail.com Email		JamesMember@gmail.com Email	

Since this form has beneficiary fields programmed, the beneficiary data is populated a well. (Learn more about programming beneficiary fields on page 21.)

Beneficiary Data Appears on the Form Where Beneficiary Fields Are Mapped

Jmember@gmail.com Email	JamesMember@gmail.com Email
12 ID Number	MI ID Issuing State
WY ID Issuing State	M545456362 ID Number

Beneficiary Designations – Please complete this section if you desire any beneficiaries on your accounts.

Beneficiary Name: JAMES CONROY	Beneficiary Name:
SSN: 999-00-0123 DOB: 02/26/1966	SSN: DOB:
Street: 150 NEWTOWN AVENUE	Street:
City/State/Zip: ANYTOWN, IN 99990009	City/State/Zip:

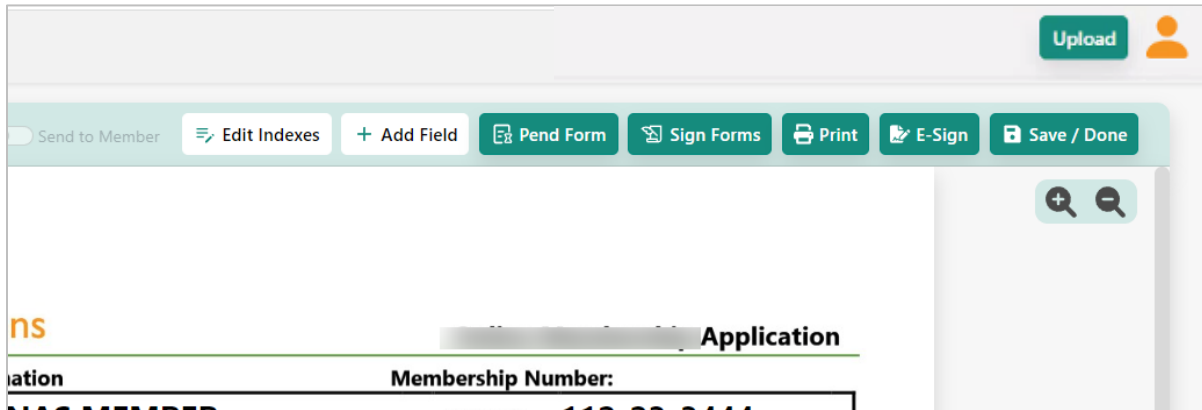
TIN Certification and Backup Withholding Information – Please complete this section.

Under penalties of perjury, I certify that the number shown above is my correct Taxpayer Identification Number (TIN). I am exempt from FATCA reporting and:

(I am a U.S. person (including U.S. resident alien).)

Advance through the form by clicking the tab key. If you have manual fields, such as text fields, check boxes, or signature fields configured on your form, fill them in to complete the form.

Buttons at the Top While Working the Form

A screenshot of a web-based form interface. At the top right, there is an 'Upload' button and a user icon. Below this, a horizontal bar contains several buttons: 'Send to Member', 'Edit Indexes', '+ Add Field', 'Pend Form', 'Sign Forms', 'Print', 'E-Sign', and 'Save / Done'. The main area of the form is partially visible, showing a section titled 'Application' with a 'Membership Number:' field. A search icon is visible on the right side of the form.

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 27.

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

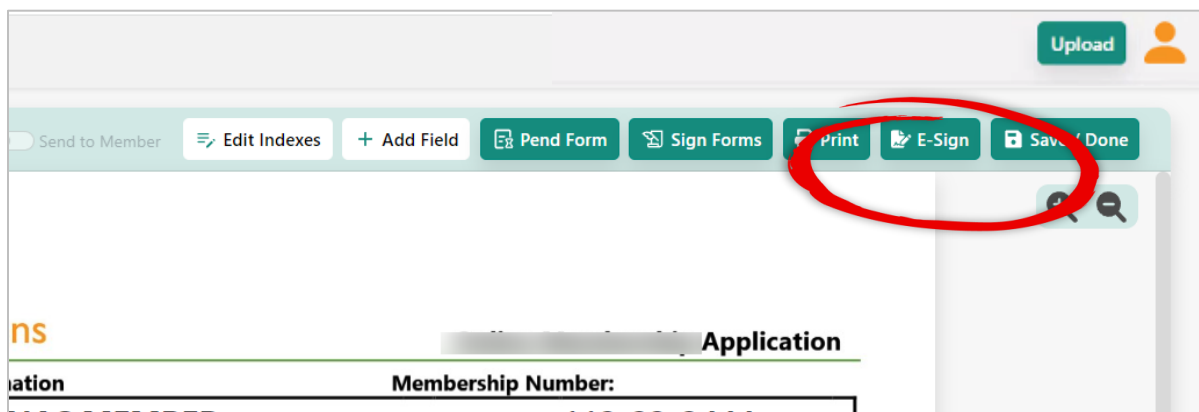
Signing Form in Branch

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

- ▷ NOTE: If you do not have SigWeb installed, a box appears to prompt you through the steps to install it. (SigWeb is the interface between your Topaz signature pad and computer.)

Sending Form for eSign

If the form is configured for eSign, then you can send the form out for remote signing. The form is sent to the email address configured when you set up the form. To start the process, click *E-Sign*. (See image below.)

A screenshot of the same web-based form interface as above. The 'E-Sign' button in the top navigation bar is circled in red, indicating it is the button to click for remote signing. The rest of the interface, including the 'Upload' button, 'Sign Forms' button, and the 'Application' section, remains the same.

Select the persons to receive the form by checking the boxes in front of their names.

You can also 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.)

Sending a Form for eSign

The screenshot shows the 'eSign Confirmation' dialog box. At the top, there's a 'Package Name' field with the value 'JONAS MEMBER 2023-07-26 10:26 AM'. Below this is a table with columns: Name, Email, Notification Type, and Auth Code. Three rows are listed, each with a checked checkbox in the Name column. The 'Lock Signature Names' checkbox is circled in red. At the bottom right, the 'Send To Member' button is greyed out, and the 'E-Sign' button is highlighted with a red circle.

Name	Email	Notification Type	Auth Code
<input checked="" type="checkbox"/> JONAS MEMBER	Jmember@gmail.com	Email	738181
<input checked="" type="checkbox"/> JAMES MEMBER	testmember@testcompany.com	Email	649259
<input checked="" type="checkbox"/> MATTHEW TEST	Mtest@gmail.com	Email	608309

You can also elect to send the form to an **It's Me 247** Signing Room or via a text message.

eSign Notification Options

The screenshot shows the 'eSign Confirmation' dialog box with the 'Notification Type' dropdown menu open. The 'Online Banking Signing Room' option is selected and circled in red. The 'Send To Member' button is greyed out, and the 'E-Sign' button is highlighted with a red circle.

Name	Email	Notification Type	Notification Detail	Auth Code
<input checked="" type="checkbox"/> JONAS MEMBER	Jmember@gmail.com	Online Banking Signing Room	2	738181
<input checked="" type="checkbox"/> JAMES MEMBER	testmember@testcompany.com	Text	Enter Phone Number...	649259
<input checked="" type="checkbox"/> MATTHEW TEST	Mtest@gmail.com	Email		608309

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

- ▷ Independently you will need to give the authorization code to the person for them to access the form.

Building a Template

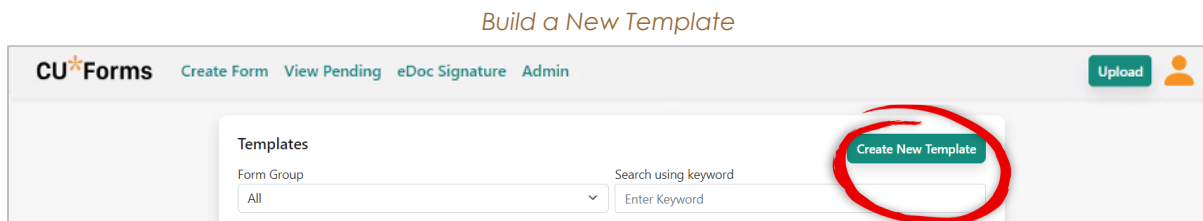
Importing a PDF and Adding Fields

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

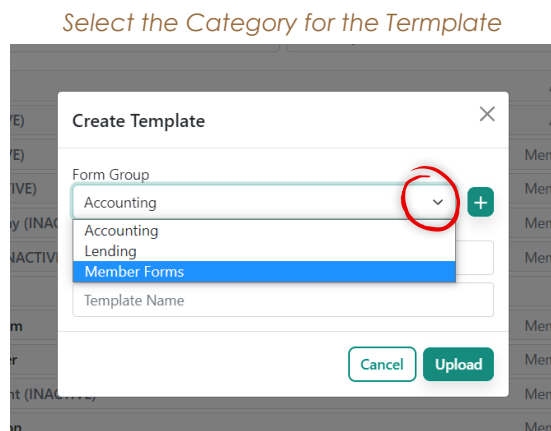
Once you have the form fields designed on the PDF, it is time to import the PDF and assign CU*BASE fields to what is called a template. This template is then used to create a form, as covered in the previous section of this booklet.

Accessing the Template Area

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



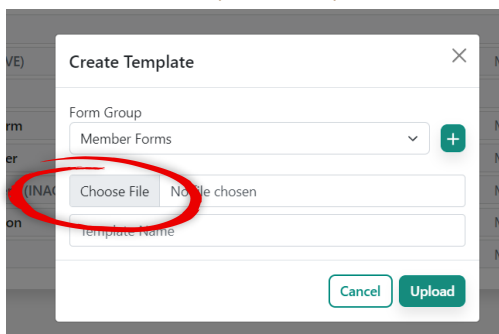
A window opens allowing you to categorize the form, choose the file, and name the template.



Importing the 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 browse to find it.

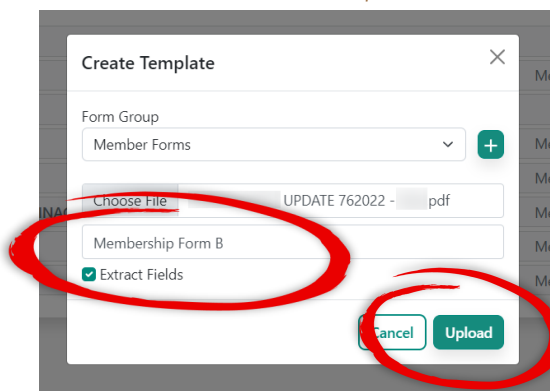
Search Your Computer to Upload the PDF



The screenshot shows a 'Create Template' dialog box. At the top, there's a 'Form Group' dropdown menu with 'Member Forms' selected. Below it, a 'Choose File' button is circled in red. To the right of the button is the text 'No file chosen'. Below the button is a text input field for 'Template Name'. At the bottom right, there are two buttons: 'Cancel' and 'Upload'.

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

Rename Your Template



The screenshot shows the 'Create Template' dialog box after a file has been selected. The 'Form Group' dropdown is still 'Member Forms'. The 'Choose File' button is circled in red. To its right, the file name 'UPDATE 762022 - pdf' is displayed. Below the file name, the 'Template Name' field now contains 'Membership Form B'. Below that, the 'Extract Fields' checkbox is checked. At the bottom right, the 'Cancel' and 'Upload' buttons are circled in red.

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

The screenshot displays the CU*Forms web interface. At the top, there's a navigation bar with 'CU*Forms' logo, 'Create Form', 'View Pending', 'eDoc Signature', and 'Admin' links. A 'Back' button and 'Membership Form B' title are on the left. On the right, there are 'Settings', 'Save Template', and 'Upload' buttons. Below the navigation bar, a 'Role' dropdown is set to 'Member/Applicant'. The main area shows a form template for 'CU*ANSWERS Imaging Solutions' with the title 'Application'. The form is divided into two main sections: 'Primary Account Holder Information' and 'Joint Account Holder Information'. The 'Primary Account Holder Information' section includes fields for 'Member/Owner Name', 'Street', 'City/State/Zip', 'Personal Email', 'Cell Phone', 'Other Phone', 'Membership Number', 'SSN/TIN', 'DOB', 'ID Number', 'ID Issuing State', and 'Employer'. The 'Joint Account Holder Information' section includes fields for 'Joint Owner 1 Name', 'Joint Owner 1 SSN', 'Joint Owner 2 Name', 'Joint Owner 2 SSN', 'Street 1', 'Street 2', 'City/State/Zip 1', 'City/State/Zip 2', 'City/State/Zip 3', 'Date of Birth 1', 'Date of Birth 2', 'Date of Birth 3', 'Phone Number 1', 'Phone Number 2', and 'Phone Number 3'. Each field has a default name like 'MemberOwnerName_11E3' or 'Street_11E3'.

Member and Joint Owner

For CU*BASE pre-filled 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

The screenshot shows a close-up of the 'Role' dropdown menu in the CU*Forms interface. The dropdown is open, showing three options: 'Member/Applicant', 'Joint Owner 1', and 'Joint Owner 2'. The 'Member/Applicant' option is currently selected. The background shows a portion of the form template, including the 'CU*ANSWERS Imaging Solutions' logo and the 'Primary' section header.

Assigning Roles to the Template

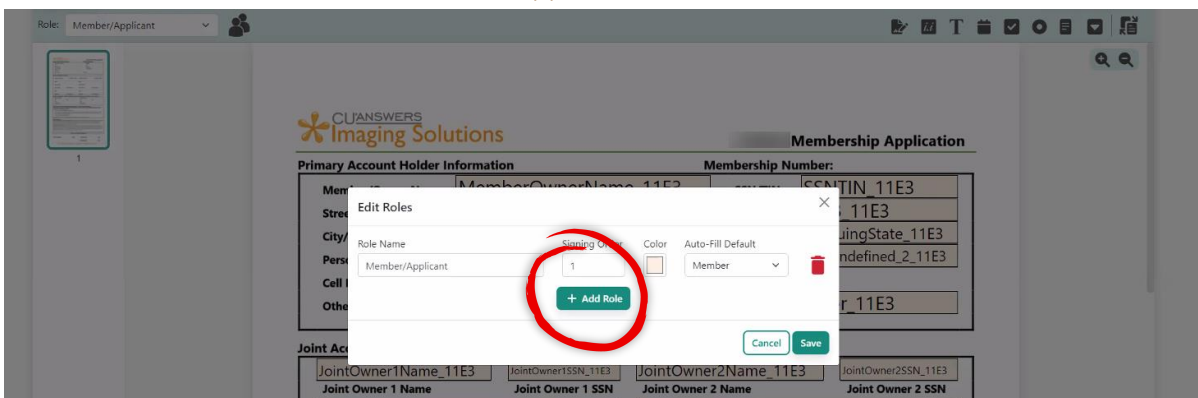
Roles indicate whether member or joint owner data will be populated. To assign roles, click the people graphic in the upper left corner of the template screen.

Adding Roles to Template



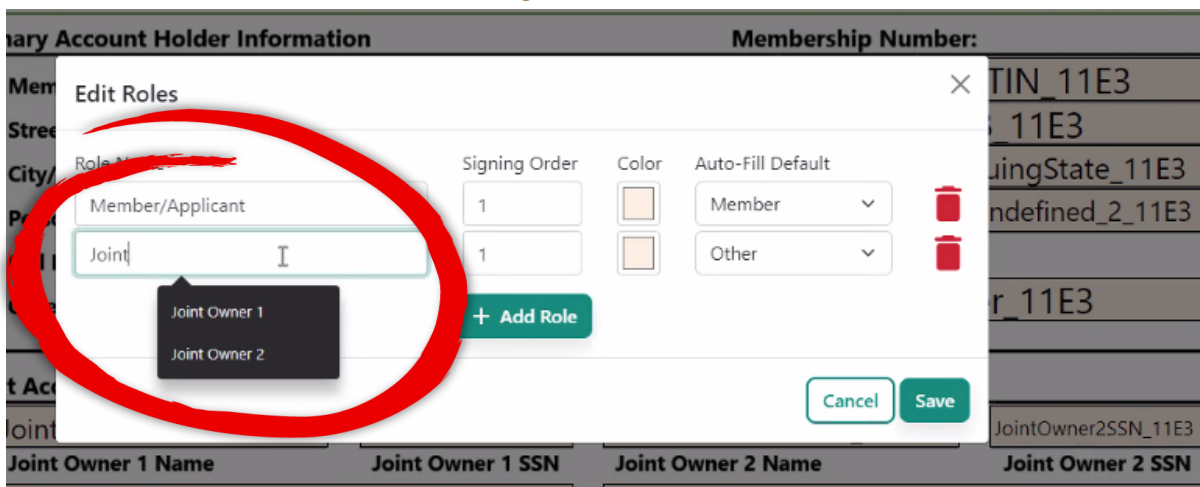
A window will appear allowing you to assign the roles. *Member Applicant* is listed by default.

Member/Applicant is Default Role



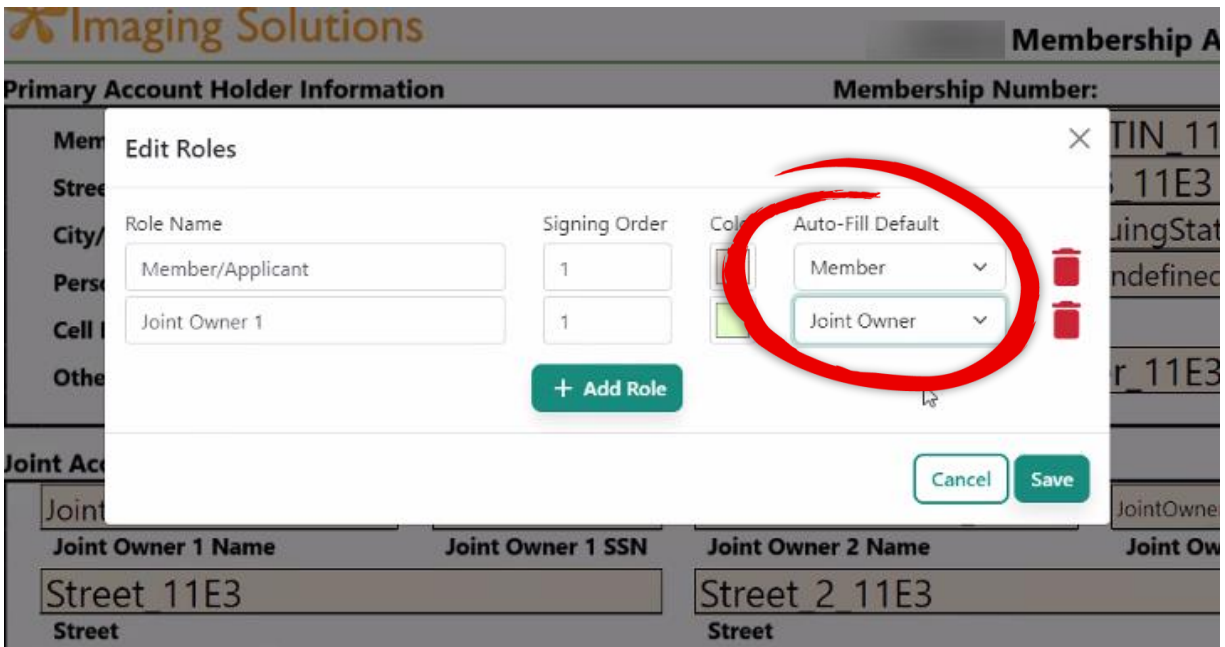
To add joint owners to this form, click *Add Role*.

Adding a Joint Owner Role



Select the role from the drop-down menu or enter a new role name.

Adding a Joint Owner Role



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

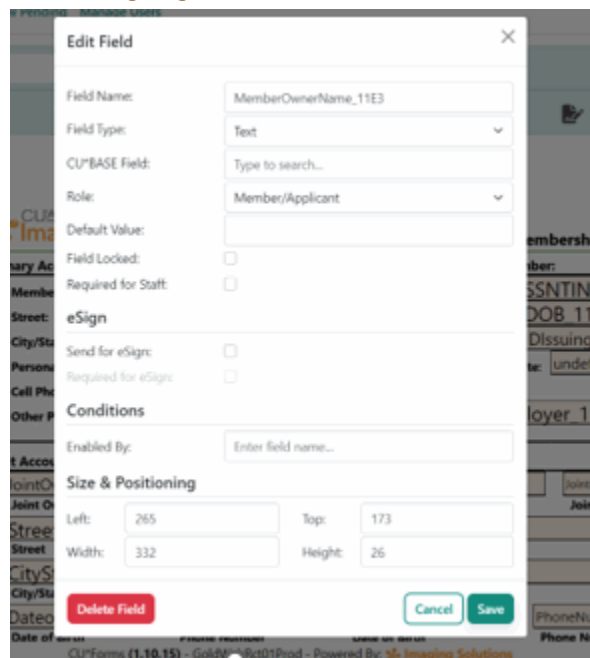
Add additional Joint Owner roles in this manner and then click **Save**.

Assigning Pre-Defined CU*BASE Field

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.

Assigning a Pre-Defined CU*BASE Field



Click CU*BASE Field to Reveal the Listing

The screenshot shows the 'Edit Field' dialog box in the CU*Forms application. The 'CU*BASE Field' dropdown is circled in red, revealing a list of available fields. The 'Field Name' is 'MemberOwnerName_11E3', 'Field Type' is 'Text', and 'Role' is 'Member/Applicant'. The 'CU*BASE Field' dropdown is currently set to 'Type to search...'. The list of available fields includes: Account Base, Account Number, Address Line 1, Address Line 2, Birth Date, Birth Year, Cell Phone Number, City, City, State ZIP, County, CU*Forms User's Email, CU*Forms User's Name, CU*Forms Username, Dividend Payment Method, Doing Business As, Driver's License #, Driver's License State, and Early Withdrawal Penalty.

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

Shorten the Field List

The screenshot shows the 'Edit Field' dialog box in the CU*Forms application. The 'CU*BASE Field' dropdown is circled in red, revealing a filtered list of available fields. The 'Field Name' is 'MemberOwnerName_11E3', 'Field Type' is 'Text', and 'Role' is 'Member/Applicant'. The 'CU*BASE Field' dropdown is currently set to 'name'. The list of available fields includes: CU*Forms User's Name, CU*Forms Username, Employer Name, First Name, Full Name, Last Name, Previous Employer Name, Sponsor's Name, Beneficiary 1 - Full Name, Beneficiary 2 - Full Name, Beneficiary 3 - Full Name, and Beneficiary 4 - Full Name.

Select the field on the list.

Selecting Field

Edit Field

Field Name: MemberOwnerName_11E3

Field Type: Text

CU*BASE Field: Full Name

Role: Member/Applicant

Default Value:

Field Locked: ☐

Required for Staff: ☐

eSign

Send for eSign: ☐

Required for eSign: ☐

Conditions

Enabled By: Enter field name...

Size & Positioning

Left: 265 Top: 173

Width: 332 Height: 26

Delete Field Cancel Save

Click Save, and the fieldname will be updated.

Field is Mapped to the Pre-Filled CU*BASE Field

CU*ANSWERS Imaging Solutions

Application

Primary Account Holder Information

Member/Owner Name: Full Name

Street: undefined_11E3

City/State/Zip: CityStateZip_11E3

Personal Email: PersonalEmail_11E3

Cell Phone: CellPhone_11E3

Other Phone: OtherPhone_11E3

Membership Number:

SSN/TIN: SSNTIN_11E3

DOB: DOB_11E3

ID Number: IDIssuingState_11E3

ID Issuing State: undefined_2_11E3

Employer: Employer_11E3

Joint Account Holder Information

JointOwner1Name_11E3 JointOwner1SSN_11E3 JointOwner2Name_11E3 JointOwner2SSN_11E3

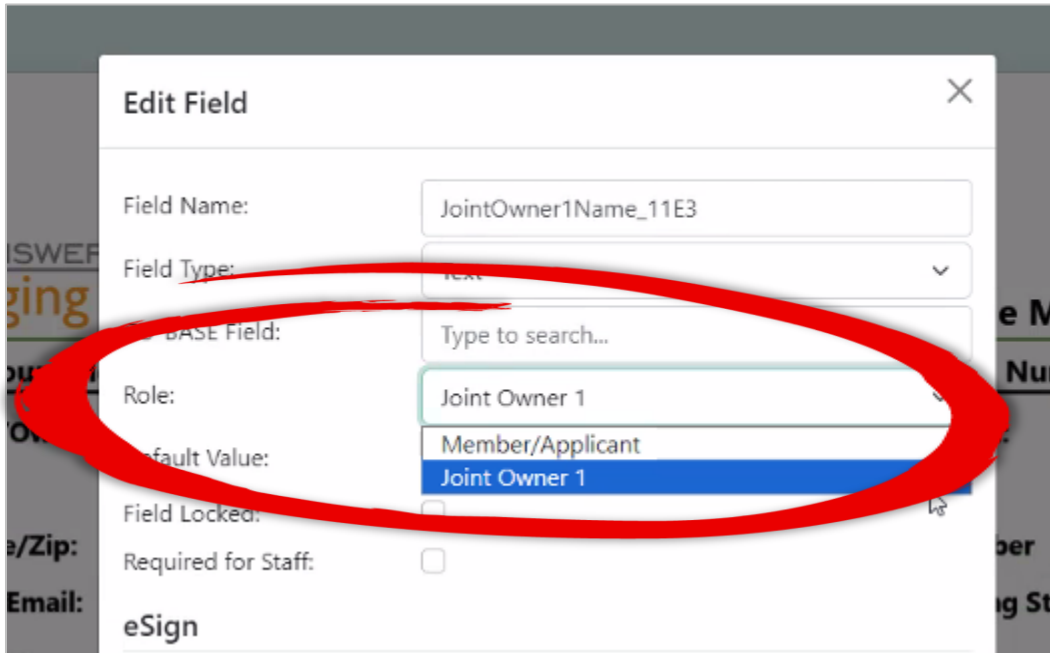
Continue this process until you have mapped all the needed fields.

Adding Joint Owner Fields to the 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.

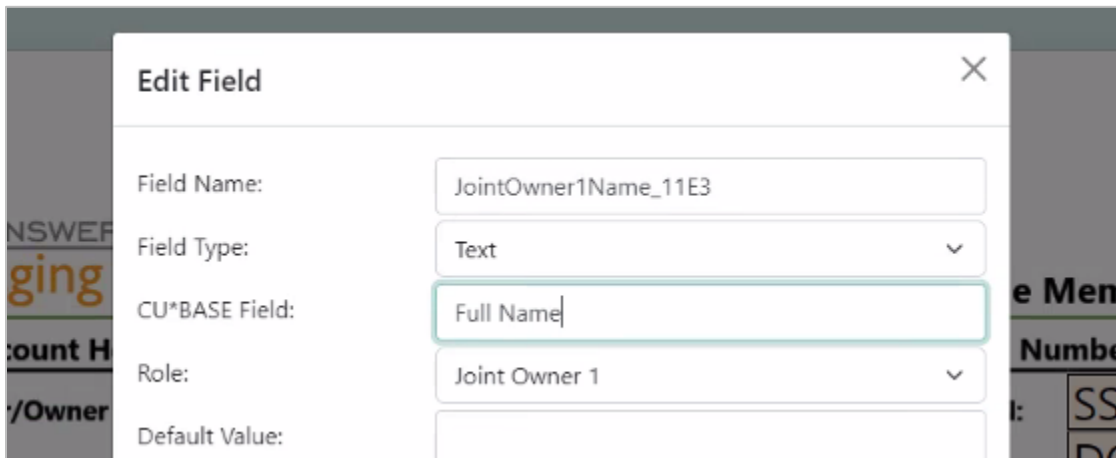
Selecting a Role for a Field



The screenshot shows the 'Edit Field' dialog box. The 'Field Name' is 'JointOwner1Name_11E3'. The 'Field Type' is 'Text'. The 'CU*BASE Field' is 'Type to search...'. The 'Role' dropdown menu is open, showing three options: 'Joint Owner 1', 'Member/Applicant', and 'Joint Owner 1'. The 'Joint Owner 1' option at the bottom is highlighted in blue. A red oval is drawn around the 'Role' dropdown menu.

Then when you select a CU*BASE field, the joint owner data will pre-fill when the form is created, as shown below.

*Joint Owner CU*BASE Pre-Filled Field will Populate*



The screenshot shows the 'Edit Field' dialog box. The 'Field Name' is 'JointOwner1Name_11E3'. The 'Field Type' is 'Text'. The 'CU*BASE Field' dropdown menu is open, showing 'Full Name'. The 'Role' dropdown menu is also open, showing 'Joint Owner 1'. The 'Default Value' is empty.

Assigning 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" in *CU*BASE Field* to present these fields for selection.

The screenshot shows the 'Edit Field' dialog box with the following fields and values:

- Field Name: DOB_2_11E3
- Field Type: Text
- CU*BASE Field: beneficiary (highlighted with a red circle)
- Role: Member/Applicant
- Default Value: (empty)
- Field Locked: ☐
- Required for Staff: ☐
- eSign
 - Send for eSign: ☐
 - Required for eSign: ☐
- Conditions
 - Enabled By: Enter field name...
- Size & Positioning
 - Left: 228, Top: 771
 - Width: 265, Height: 27

At the bottom of the dialog are three buttons: 'Delete Field' (red), 'Cancel' (light blue), and 'Save' (green).

In the background, a form titled 'Joint Owner 2 SSN' is visible, showing fields for Beneficiary 1 and Beneficiary 2, including Birth Date, City, State, ZIP, Full Address, Full Name, SSN / TIN / EIN, and Street Address.

Other Field Options

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

Other Field Attributes

Edit Field

Field Name:

MemberOwnerName_11E3

Field Type:

Text

Full Name

Role:

Member Applicant

Default Value:

Field Locked:

☐

Required for Staff:

☐

eSign

Send for eSign:

☐

Required for eSign:

☐

Conditions

Enabled By:

Size & Positioning

Left:

265

Top:

173

Width:

332

Height:

26

Delete Field

Cancel

Save

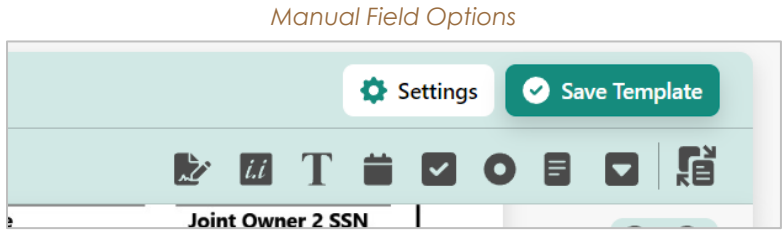
The following field-level settings can be granted.

Field Settings










Field	Description
Default value	What is typed in the field provided is auto input 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 in eSign.
Required for eSign	This field is required when the form is sent for eSign, for example a signature field.

Adding a Manual Field

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



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.

Saving the Template

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

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

Saving Form

The screenshot shows the 'Membership Form B' configuration interface. At the top, there is a 'Back' button and a search bar. Below this, a 'Role' dropdown is set to 'Member/Applicant'. The main area contains a form with fields for 'Joint Owner 1 Name', 'Joint Owner 1 SSN', 'Joint Owner 2 Name', and 'Joint Owner 2 SSN'. The 'Save Template' button in the top right corner is circled in red.

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

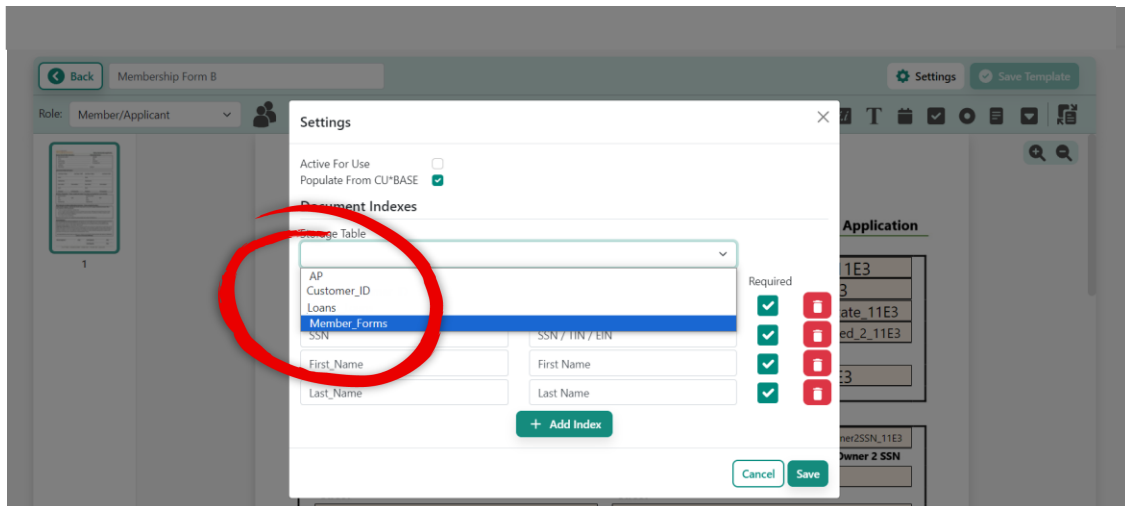
Settings for Saving

The screenshot shows the 'Settings' dialog box for saving the template. The 'Storage Table' dropdown menu is circled in red. The dialog box also includes options for 'Active For Use' and 'Populate From CU*BASE', and a table for 'Document Indexes' with columns for 'Index Name', 'CU*BASE Field', and 'Required'.

Index Name	CU*BASE Field	Required
Account	Account Base	<input checked="" type="checkbox"/>
SSN	SSN / TIN / EIN	<input checked="" type="checkbox"/>
First_Name	First Name	<input checked="" type="checkbox"/>
Last_Name	Last Name	<input checked="" type="checkbox"/>

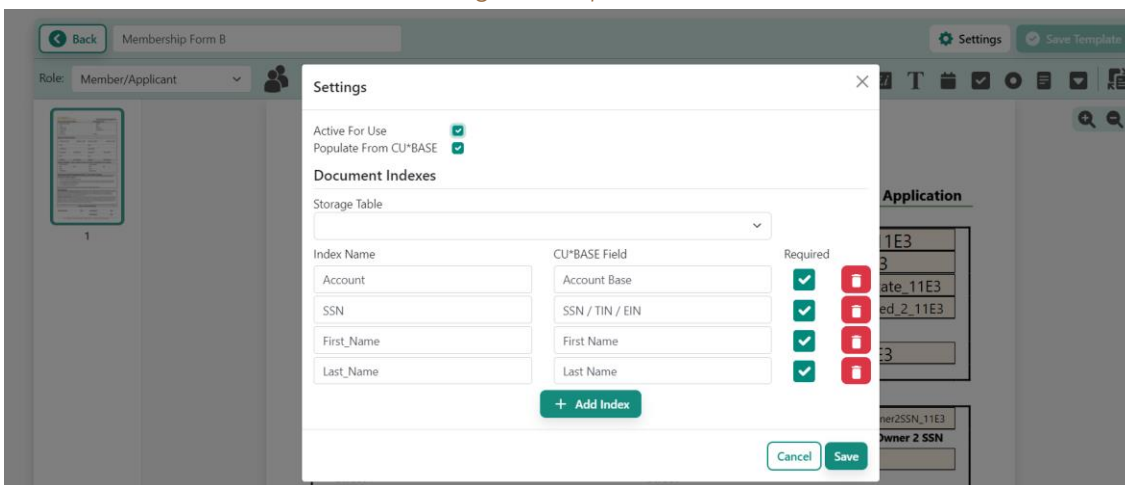
Click the down arrow and select the appropriate category.

Selecting the Storage Table

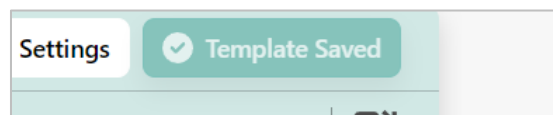


Click *Active for Use* when you are done creating the template.

Making the 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 will no longer be marked as inactive.

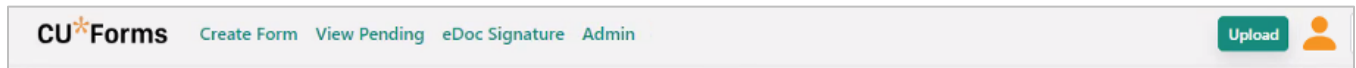
- Important note! If you do not mark it as *Active for Use* it will remain in draft and only be available for other users with *Edit Template* permissions. This can be helpful, however, for testing the form.

Managing Users

All Permissions Assigned Versus Default Permissions

CU*Forms allows you to set permissions for users to give them access to different 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.) *View Pending* allows you to save documents to pending and view them.

Adjusting 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 your permissions.)

Manage Users Selected

The image is a screenshot of the 'Manage Users' form. At the top, there's a dropdown menu with 'AM_CU.' selected and a red square icon. Below this, the form is divided into two main sections: 'Info' and 'Permissions'. The 'Info' section contains three input fields: 'eDOC User:' with 'M_CUA' entered, 'Full Name:' with 'A' and 'M' in separate boxes, and 'Email:' with '@cuanswers.com' entered. The 'Permissions' section has three checkboxes, all of which are checked: 'Build Templates', 'Manage Users', and 'Manage Pending'. A green 'Save' button is located at the bottom right of the form.

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 user can define your permissions.
Manage Pending	This permission allows the user to create new pending areas and delete current ones.

The Pending Area

Temporarily Holding Forms

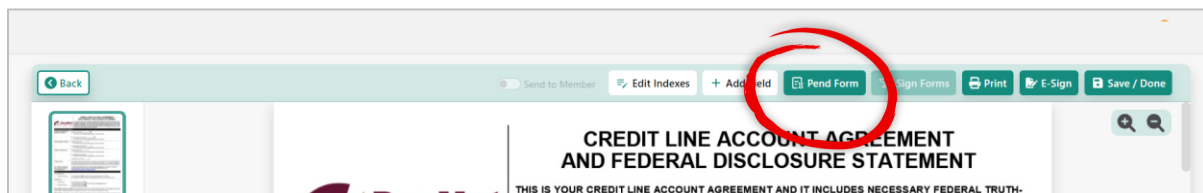
You can temporarily save an incomplete form to the pending area, for example, if you are waiting for a member to sign the form in branch,

- ▷ 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.

Adding a Form to the Pending Area

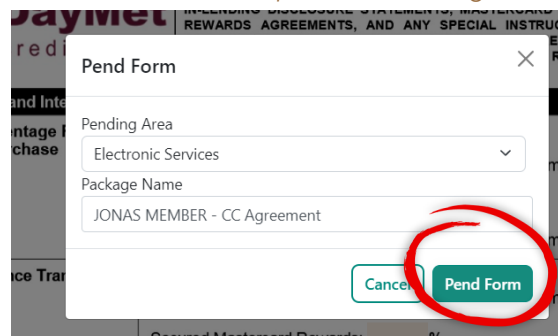
To add a form to the Pending area, click *Pend Form*.

Saving a Form to the Pending Area



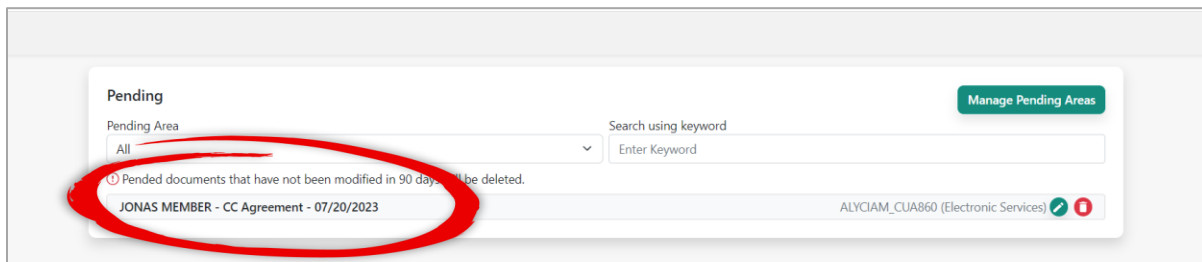
Select the sub folder under which it will be saved. Click *Pend Form* again.

Click Add Pend to Complete the Pending Process



The Pending form can then be viewed in the Pending area.

Pending Form Saved in Pending Area

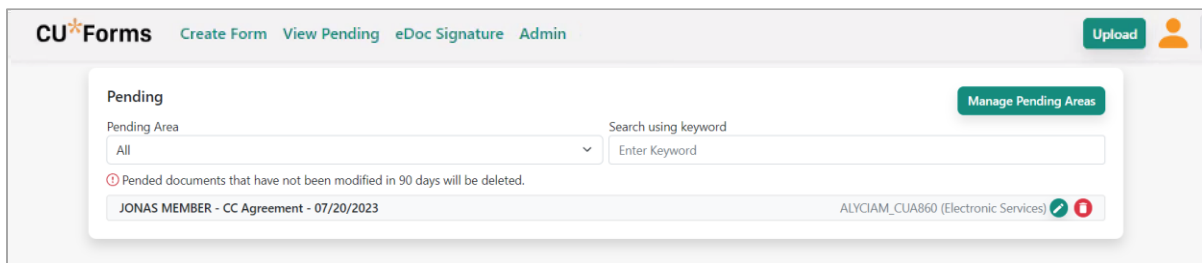


The screenshot shows the 'Pending' section of the CU*Forms interface. At the top right is a 'Manage Pending Areas' button. Below it is a 'Pending Area' dropdown menu set to 'All', which is circled in red. To the right of the dropdown is a search bar labeled 'Search using keyword' with the placeholder 'Enter Keyword'. Below the search bar is a warning message: 'Pended documents that have not been modified in 90 days will be deleted.' Below this is a table with one row: 'JONAS MEMBER - CC Agreement - 07/20/2023'. To the right of this row is the text 'ALYCIAM_CUA860 (Electronic Services)' with a green checkmark and a red 'i' icon.

Retrieving Pending Forms

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

Retrieving a Form Saved in Pending Area



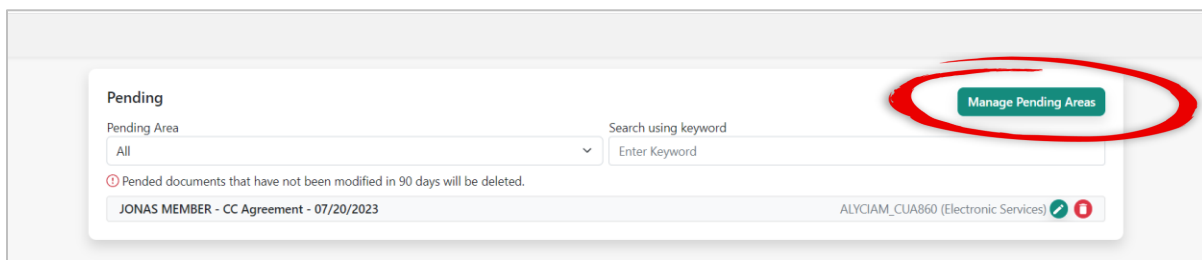
The screenshot shows the CU*Forms interface with the 'View Pending' tab selected in the top navigation bar. The 'Pending' section is visible, showing the same list of pending documents as the previous screenshot. The 'All' dropdown menu is circled in red.

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

Adding Additional Pending Folders and Deleting Folders

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

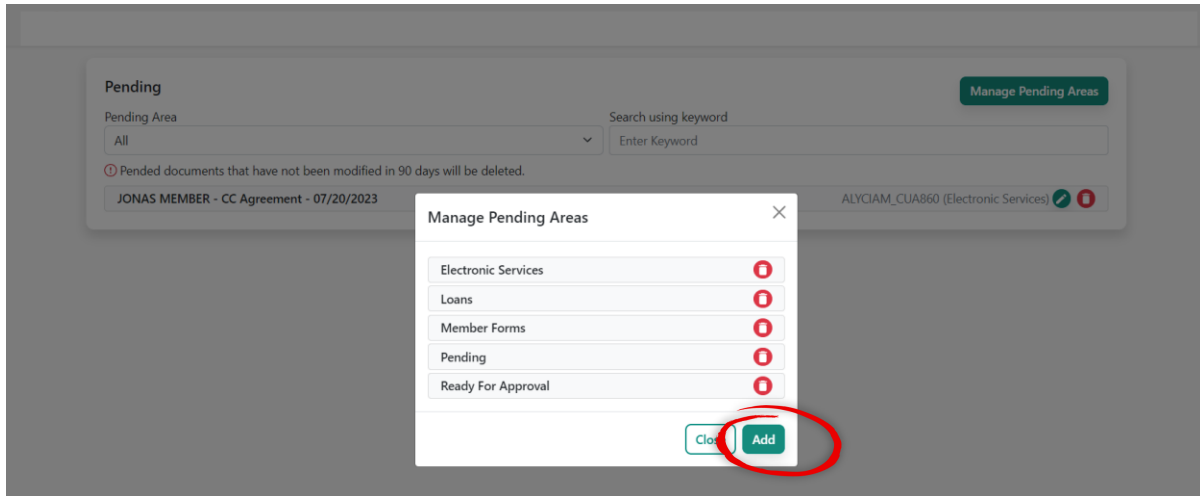
Managing the Pending Area Folders



The screenshot shows the 'Pending' section of the CU*Forms interface. The 'Manage Pending Areas' button is circled in red. Below it is a 'Pending Area' dropdown menu set to 'All', which is also circled in red. To the right of the dropdown is a search bar labeled 'Search using keyword' with the placeholder 'Enter Keyword'. Below the search bar is a warning message: 'Pended documents that have not been modified in 90 days will be deleted.' Below this is a table with one row: 'JONAS MEMBER - CC Agreement - 07/20/2023'. To the right of this row is the text 'ALYCIAM_CUA860 (Electronic Services)' with a green checkmark and a red 'i' icon.

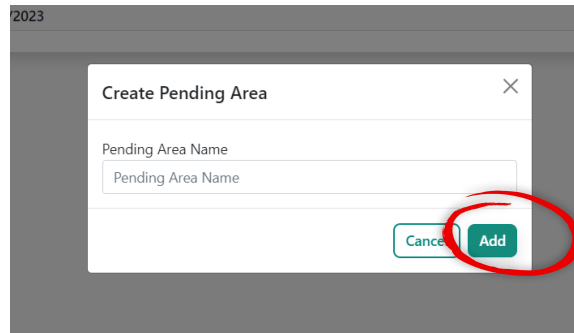
From the Pending area, click *Manage Pending Area*.

Viewing the Pending Area Sub-folder Structure



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

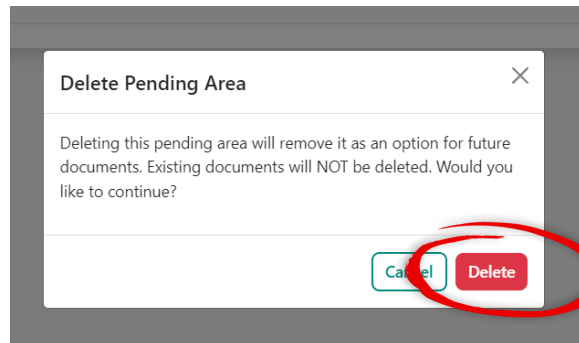
Adding a New Sub Folder in the Pending Area



To delete a folder from the pending area, click the trashcan 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.

Deleting a Folder in the Pending Area

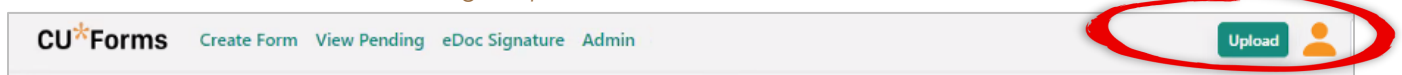


Upload a General Form for Archive

Archive a General Form to a Membership

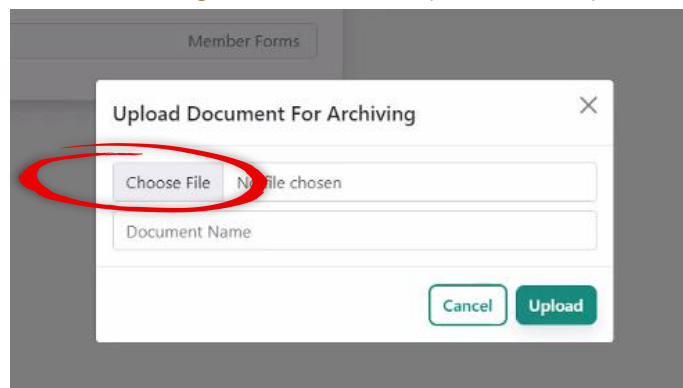
You can also archive a general form to a membership without importing CU*BASE data. To do this, click the *Upload* button to the right of the top toolbar.

Selecting to Upload a PDF to Create a General Form



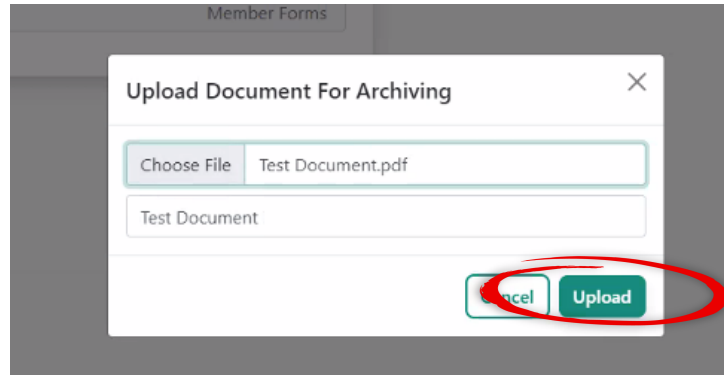
A window will appear allowing you to update the PDF form.

Choosing the PDF from Computer Directory



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

Final Upload of the PDF Form



Member Forms

Upload Document For Archiving

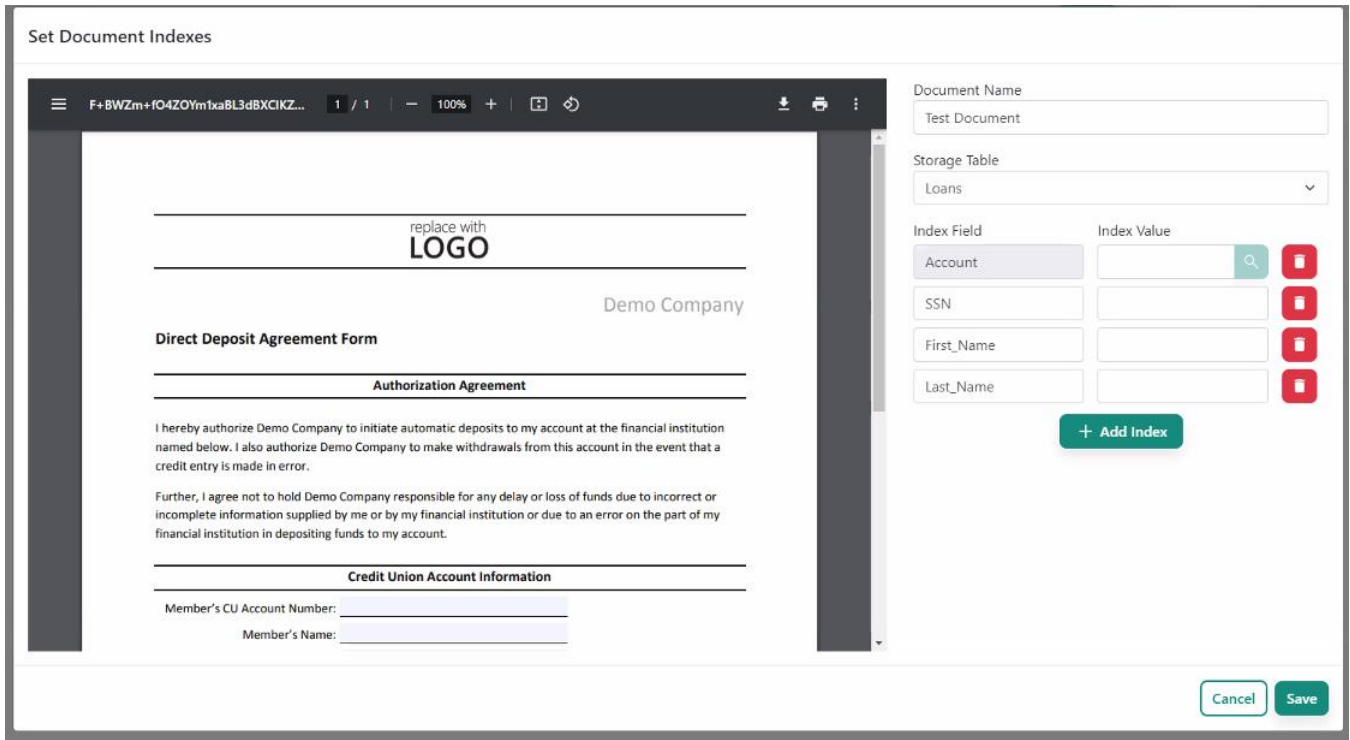
Choose File Test Document.pdf

Test Document

Cancel Upload

Click *Upload* again. The fields will appear allowing you set the document indexes.

Form is Ready to Index



Set Document Indexes

Document Name: Test Document

Storage Table: Loans

Index Field	Index Value
Account	<input type="text"/>
SSN	<input type="text"/>
First_Name	<input type="text"/>
Last_Name	<input type="text"/>

+ Add Index

Cancel Save

Entering the Index Values for Archive

Set Document Indexes

F+BWZm+fO4ZOYm1xaBL3dBXCIKZ... 1 / 1 100% + -

replace with
LOGO

Demo Company

Direct Deposit Agreement Form

Authorization Agreement

I hereby authorize Demo Company to initiate automatic deposits to my account at the financial institution named below. I also authorize Demo Company to make withdrawals from this account in the event that a credit entry is made in error.

Further, I agree not to hold Demo Company responsible for any delay or loss of funds due to incorrect or incomplete information supplied by me or by my financial institution or due to an error on the part of my financial institution in depositing funds to my account.

Credit Union Account Information

Member's CU Account Number:

Member's Name:

Document Name
Test Document

Storage Table
Loans

Index Field	Index Value	
Account	2222	<input type="button" value="X"/>
SSN	123456789	<input type="button" value="X"/>
First_Name	JOE	<input type="button" value="X"/>
Last_Name	SMITH	<input type="button" value="X"/>

+ Add Index

Cancel

Save

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

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 store page devoted to the product
<https://store.cuanswers.com/product/cuforms/>.

How do you access **CU*Forms**?

You access **CU*Forms** from the Timeout 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 Imaging Solutions Enhanced online vault or if you subscribe to release management for your In House Vault.

How many forms can you 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 13.

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

Over 150 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 in order for it to be available to all your employees to create as a form.

Can all users see all of 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 who can 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 21.

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 with more than default permissions: 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, that field will be advanced to 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 23.

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

It is not necessary to create a 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.