

# CU\*Forms

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Find this booklet online: [open.cuanswers.com/cubase-reference](https://open.cuanswers.com/cubase-reference)

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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.

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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:

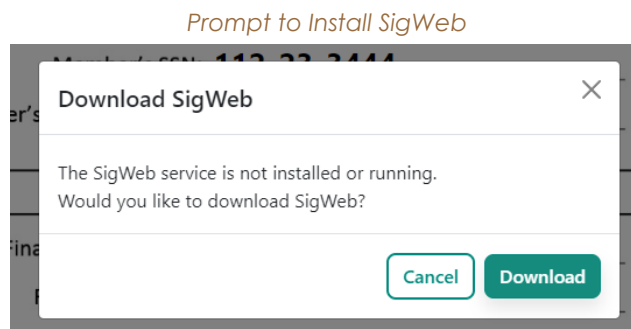
- How to use and sign a form
- How to build a template

### 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.



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

# Access CU\*Forms

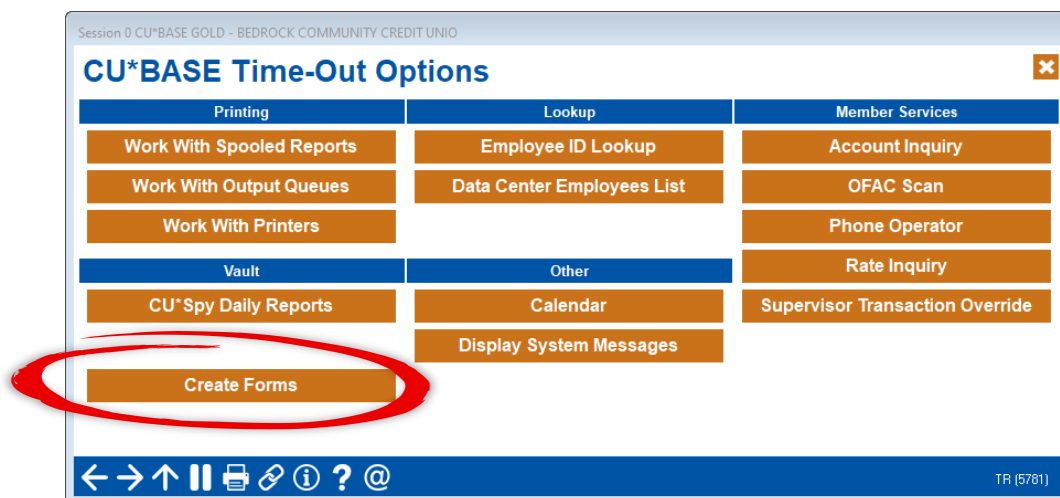
## Getting into the Software

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*

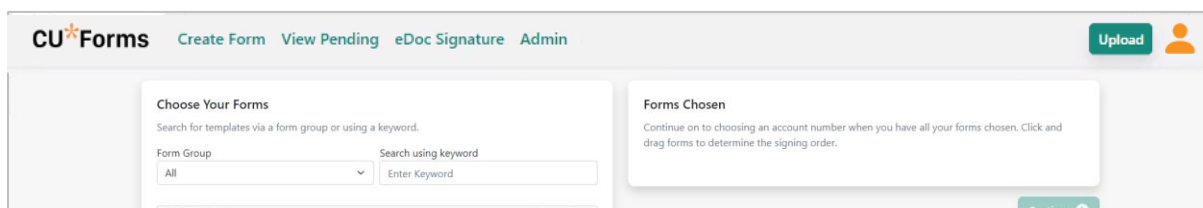


- ▷ If you are not set up with CU\*Forms, you will be redirected to the store page to sign up for the feature.

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.

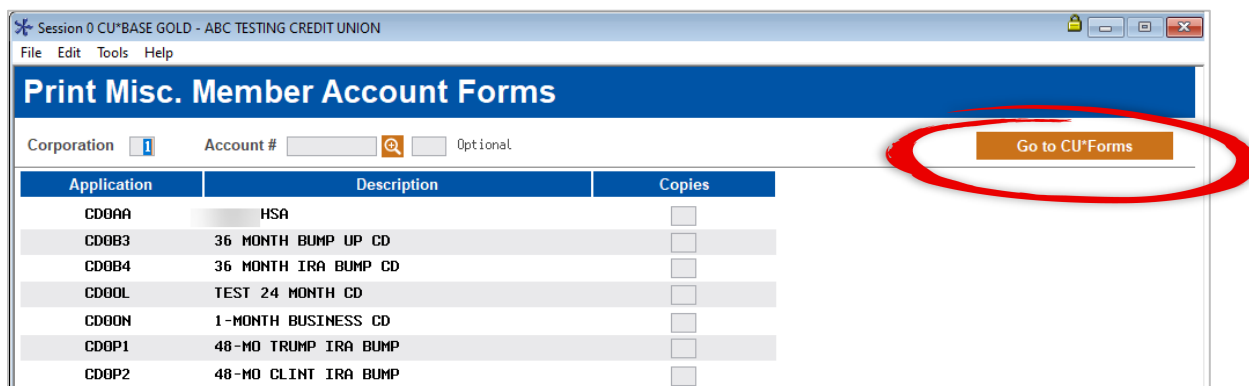
*Permissions for a Admin User - All Access Granted*



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.



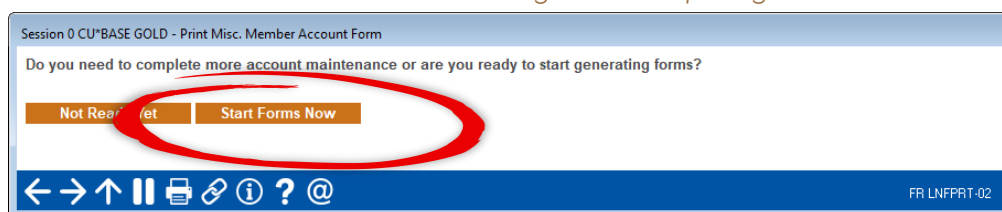
Application	Description	Copies
CD0AA	HSA	<input type="checkbox"/>
CD0B3	36 MONTH BUMP UP CD	<input type="checkbox"/>
CD0B4	36 MONTH IRA BUMP CD	<input type="checkbox"/>
CD0DL	TEST 24 MONTH CD	<input type="checkbox"/>
CD0ON	1-MONTH BUSINESS CD	<input type="checkbox"/>
CD0P1	48-MO TRUMP IRA BUMP	<input type="checkbox"/>
CD0P2	48-MO CLINT IRA BUMP	<input type="checkbox"/>

## 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*

The screenshot shows the 'CU Forms' application interface. At the top, there is a navigation bar with links: 'Create Form', 'View Pending', 'eDOCSignature', and 'Admin'. On the right side of the bar are 'Upload', a bell icon, and a user profile icon. Below the navigation bar, a 'Back' button is visible. The main content area is titled 'Membership - 1 JOHN MEMBER - April 1, 2024'. Under this title, there are four tabs: 'Create Forms', 'FormFLOW' (which is active), 'Documents', and 'Notes'. The 'FormFLOW' tab contains a section titled 'Select Accounts' with the instruction: 'Changing account selection may change the forms selected below based on product configuration.' Below this instruction are six buttons representing different account types: '000 - TEST SHARES', '001 - YES ACCOUNT', '002 - CHECKING', '366 - 8 MONTH CERTIFICATE', '367 - 8 MONTH CERTIFICATE', and '368 - 8 MONTH CERTIFICATE'. Below the account selection is a section titled 'Selected Forms' with the instruction: 'Forms below are listed in signing order from left to right, top to bottom. Click and drag to reorder.' Under this instruction, it says 'No Forms Selected'. To the right of the 'Selected Forms' section is a green button labeled 'Add Forms'. At the bottom of the 'FormFLOW' tab are two buttons: 'Save Selections' and 'Populate Forms' with a right-pointing arrow.

- ▷ 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

The screenshot shows the CU\*Forms web interface. At the top, there's a navigation bar with 'CU\*Forms', 'Create Form', 'View Pending', 'eDoc Signature', and 'Admin'. On the right, there's an 'Upload' button and a user icon. The main content area is split into two panels. The left panel, titled 'Choose Your Forms', includes a search bar and a list of forms. The forms are grouped into categories like 'ACC Application', 'Account Card', 'CC Agreement', 'Debit Card Dispute Form', 'Indirect Welcome Letter', 'Membership Agreement', and 'Membership Application'. The 'Membership Application' form is circled in red. The right panel, titled 'Forms Chosen', contains instructions and a 'Continue' button.

Form Group	Search using keyword
All	Enter Keyword

Form Name	Category
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

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

CU\*Forms Create Form View Pending eDoc Signature Admin Upload

**Choose Your Forms**  
Search for templates via a form group or using a keyword.

Form Group: All Search using keyword: Enter Keyword

Form Name	Category
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.

✓ Membership Application Member Forms

Continue

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

Select Account

Search for the account you would like to create forms for.

Account Base: Enter Account Base...

Search Types: Account SSN Name

Pull Account Data

Cancel

Enter your member data.

### Pull Data into Form

Select Account

Search for the account you would like to create forms for.

Account Base: :22

Search Types: Account SSN Name

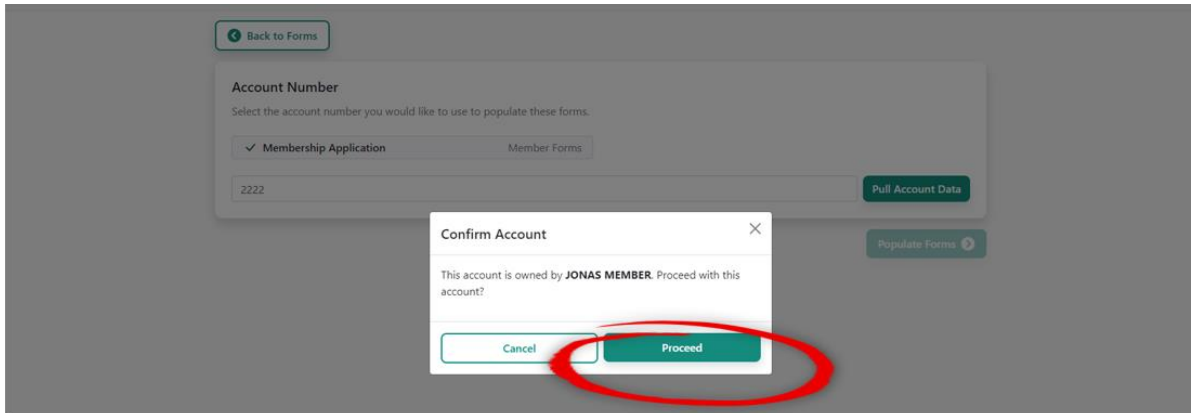
Pull Account Data

Cancel

Click *Pull Account Data*.

A confirmation window will appear showing the member.

### Confirm Member



Back to Forms

Account Number

Select the account number you would like to use to populate these forms.

✓ Membership Application Member Forms

2222

Pull Account Data

Populate Forms

Confirm Account

This account is owned by JONAS MEMBER. Proceed with this account?

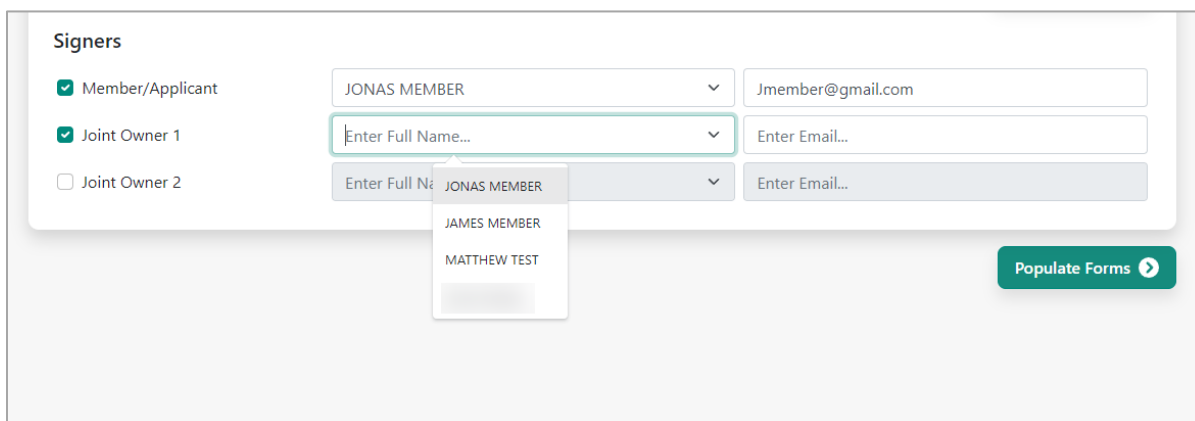
Cancel Proceed

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



Signers

✓ Member/Applicant

✓ Joint Owner 1

□ Joint Owner 2

JONAS MEMBER

Enter Full Name...

Enter Full Name...

JONAS MEMBER

JAMES MEMBER

MATTHEW TEST

Jmember@gmail.com

Enter Email...

Enter Email...

Populate Forms

▷ 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's a navigation bar with 'CU\*Forms', 'Create Form', 'View Pending', 'eDoc Signature', and 'Admin'. A 'Back to Forms' button is in the top left. The main section is titled 'Account Number' with a sub-header 'Select the account number you would like to use to populate these forms.' Below this, there's a 'Membership Application' tab and a 'Member Forms' tab. A text input field contains '2222', and a 'Pull Account Data' button is to its right. The 'Signers' section has three rows: 'Member/Applicant' with 'JONAS MEMBER' and 'Jmember@gmail.com'; 'Joint Owner 1' with 'JONAS MEMBER' and 'Jmember@gmail.com'; and 'Joint Owner 2' with 'JAMES MEMBER' and an 'Enter Email...' input field. A red circle highlights the 'Enter Email...' input field. A 'Populate Forms' button is at the bottom right.

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

*Populate Form with Data from CU\*BASE*

This screenshot is similar to the previous one, but the email address for 'Joint Owner 2' is now 'JamesMember@gmail.com'. The 'Populate Forms' button at the bottom right is highlighted with a red circle. The 'Pull Account Data' button is still present next to the '2222' account number.

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

CU\*Forms   Create Form   View Pending   eDoc Signature   Admin   Upload  

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

1

**CU\*Answers Imaging Solutions**

**Online Membership Application**

**Primary Account Holder Information**      **Membership Number:**

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

**Joint Account Holder Information**

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

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

<b>Jmember@gmail.com</b>	<b>Jmember@gmail.com</b>
Email	Email
<b>12</b> <b>WY</b>	<b>M545456362</b> <b>MI</b>
ID Number      ID Issuing State	ID Number      ID Issuing State

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

<b>Beneficiary Name: JAMES CONROY</b>	<b>Beneficiary Name:</b> <input type="text"/>
<b>SSN: 999-00-0123      DOB: 02/26/1966</b>	<b>SSN:</b> <input type="text"/> <b>DOB:</b> <input type="text"/>
<b>Street: 150 NEWTOWN AVENUE</b>	<b>Street:</b> <input type="text"/>
<b>City/State/Zip: ANYTOWN, IN 99990009</b>	<b>City/State/Zip:</b> <input type="text"/>

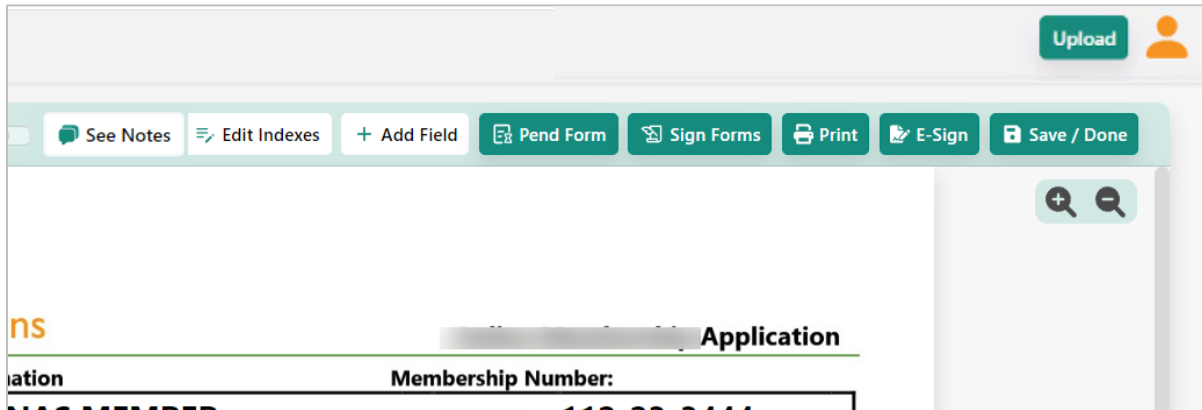
**TIN Certification and Backup Withholding Information – Please complete this section.**

*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:*

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

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

A screenshot of the top portion of a web-based form interface. At the top right, there is a green 'Upload' button and a user profile icon. Below this is a horizontal bar containing several green buttons: 'See Notes', 'Edit Indexes', '+ Add Field', 'Pend Form', 'Sign Forms', 'Print', 'E-Sign', and 'Save / Done'. The main content area below the buttons shows a form with a green header bar. The header bar contains the text 'ns' on the left and 'Application' on the right. Below the header bar, there is a label 'Membership Number:' followed by a text input field.

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

A screenshot of a dropdown menu titled 'Signing Experience:'. The dropdown is open, showing two options: 'Signature Pad' and 'Touch Screen'. The 'Signature Pad' option is highlighted with a blue background. To the right of the dropdown, there is a toggle switch labeled 'Se'.

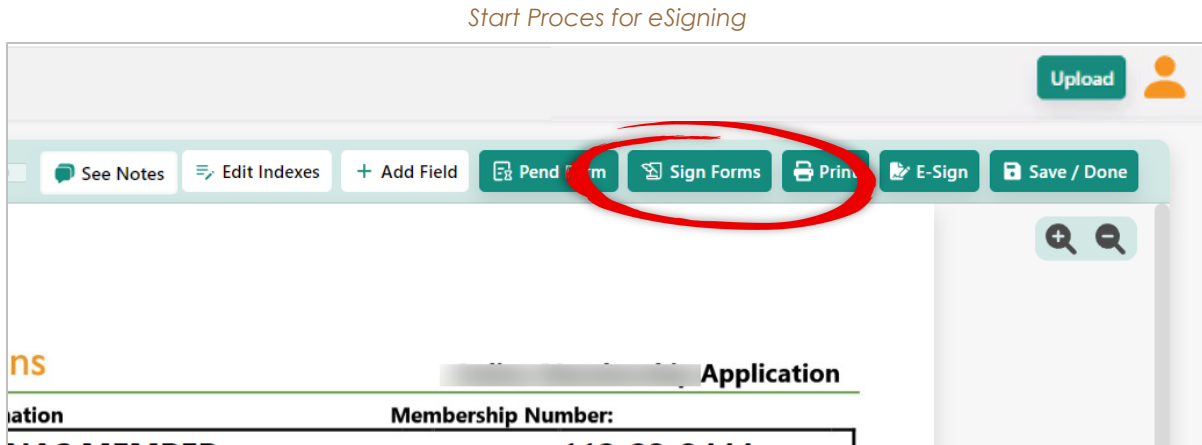
- ▷ NOTE: If you are using a signature pad, you must have SigWeb installed. (SigWeb is the interface between your Topaz signature pad and computer.)

## 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*



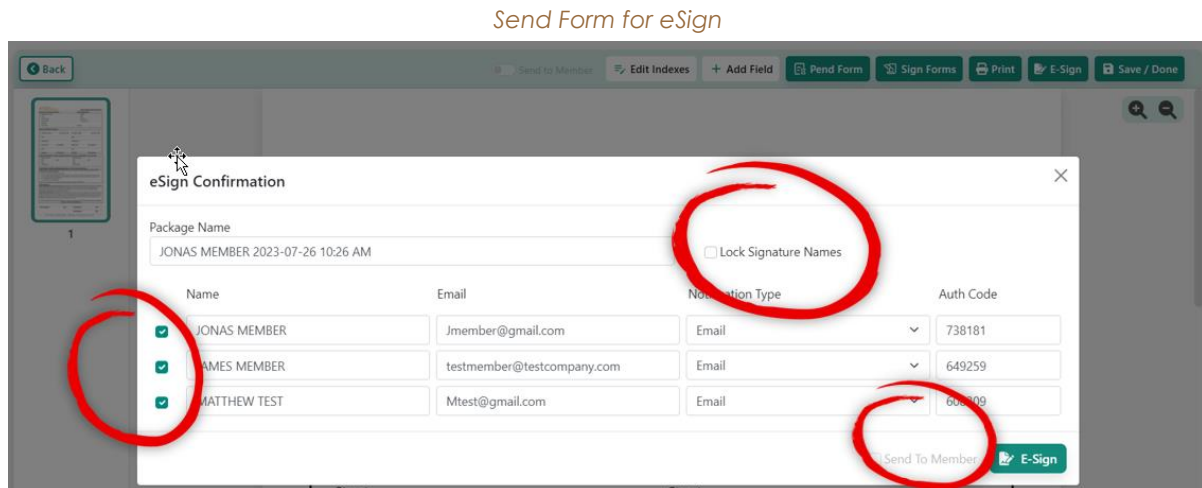
The screenshot shows the top toolbar of the eSign interface. The 'Sign Forms' button is circled in red. Other buttons include 'See Notes', 'Edit Indexes', '+ Add Field', 'Pend Form', 'Print', 'E-Sign', and 'Save / Done'. There is also an 'Upload' button and a user icon in the top right corner.

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*



The screenshot shows the 'eSign Confirmation' dialog box. The 'Lock Signature Names' checkbox is circled in red. The 'Send To Member' button is also circled in red. The dialog box contains a table with columns for Name, Email, Notification Type, and Auth Code. The 'Send To Member' button is located at the bottom right of the dialog box.

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	600109

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

**eSign Confirmation**

Package Name: JONAS MEMBER 2023-07-26 10:26 AM

☐ Lock Signature Names

	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

☐ Send To Members

**E-Sign**

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

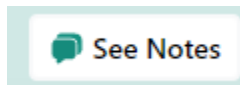
- ▷ Independently, you will need to provide the authorization code (listed on the eSign Confirmation screen) to the selected persons for them to access the form.

## Read Notes

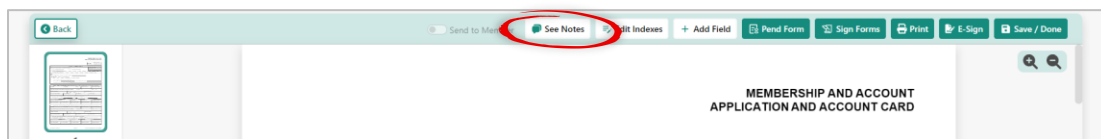
You can write notes in your templates to give helpful tips to front line staff when they are filling out the forms with the members. For information on configuring these notes, see page 18.

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

**Template Notes**

Membership and Account Card Application

This is a note explaining how to fill out the Membership and Account Card Application.

Test Document

**Close**

# Build a Template

## And Add Import Fields

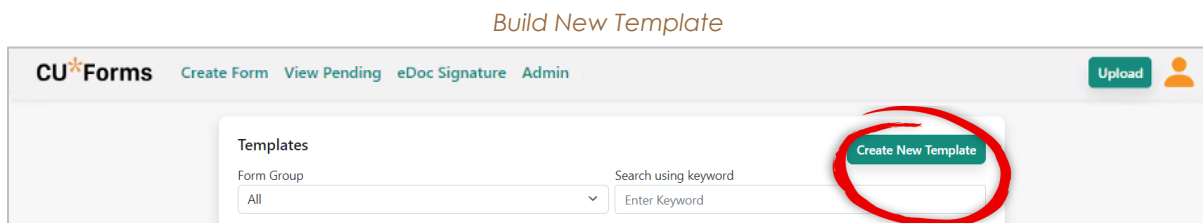
### Import PDF and Add Fields

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.

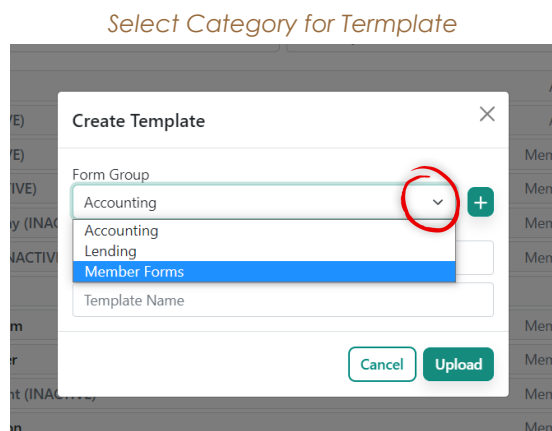
Once you have the form fields designed on the PDF, it is time to import the PDF and assign CU\*BASE fields to create a template. This template is then used to create a form, as covered in the previous section of this booklet.

### Access Template Area

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



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

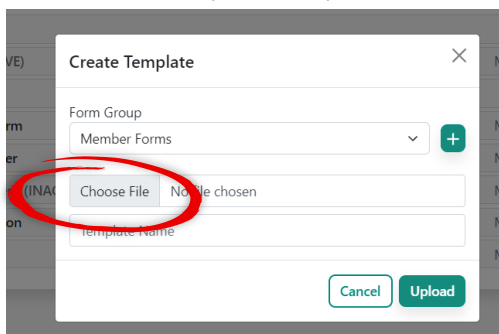




## Import PDF with Defined Fields

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*



Create Template

Form Group  
Member Forms

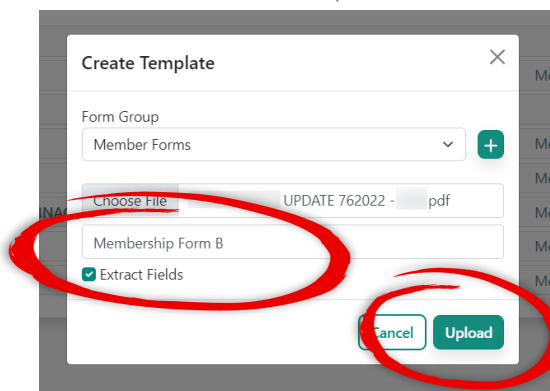
Choose File No file chosen

Template Name

Cancel Upload

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

*Rename Template*



Create Template

Form Group  
Member Forms

Choose File UPDATE 762022 - pdf

Membership Form B

☒ Extract Fields

Cancel Upload

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.

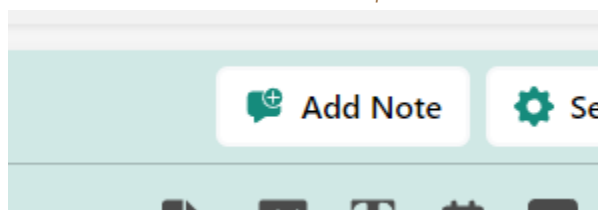
### Template Uploads with Default Field Names

The screenshot displays the CU\*Forms interface for editing a form template. The top navigation bar includes 'CU\*Forms', 'Create Form', 'View Pending', 'eDoc Signature', and 'Admin'. A 'Back' button and the form title 'Membership Form B' are on the left. On the right, there are 'Add Note', 'Settings', 'Save Template', and 'Upload' buttons. Below the navigation bar, the role 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 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', '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 is labeled with a default field name, such as 'MemberOwnerName\_11E3'.

### Add Note to Forms

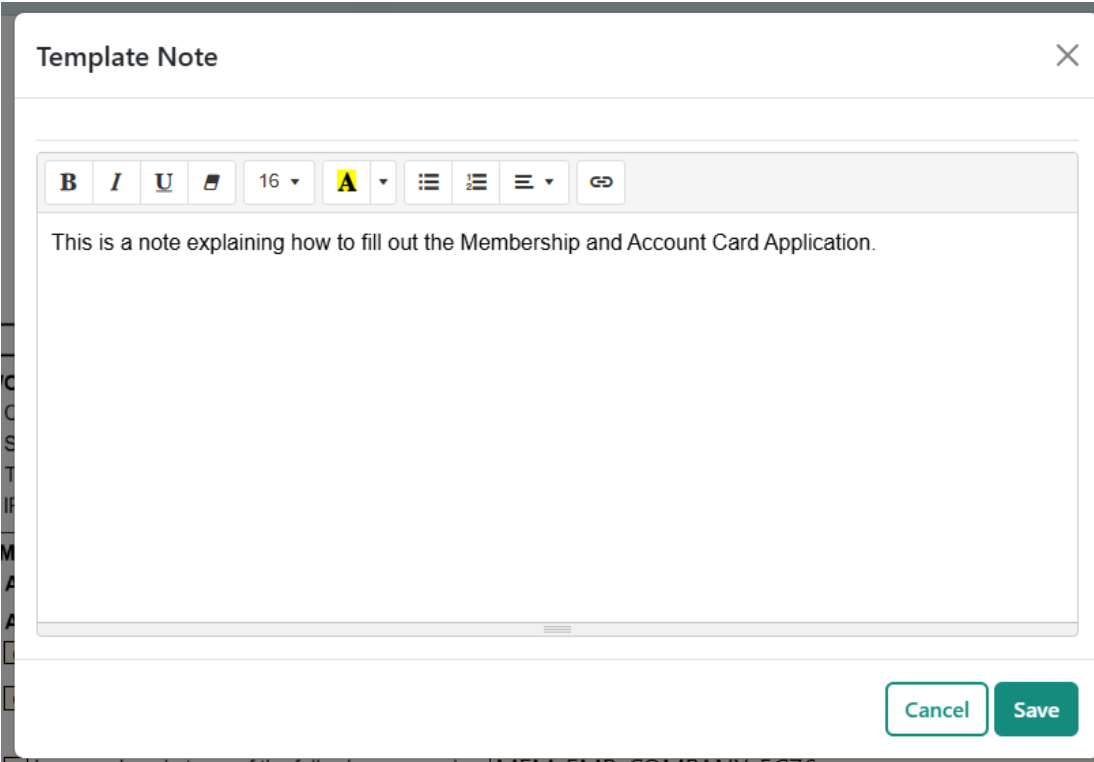
You can also add notes to forms so that front line staff have directions on how to complete the forms. To do this, click the *Add Note* button in the upper right corner of the screen.

### 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*



Template Note

**B** *I* U A 16 ▼ 

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[G](#)

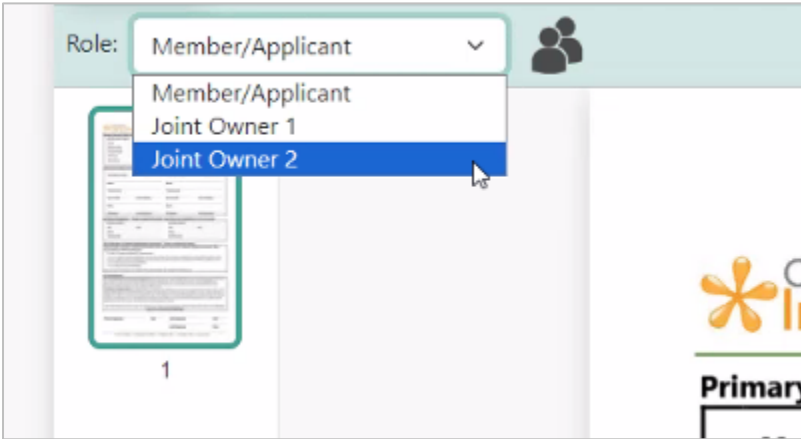
This is a note explaining how to fill out the Membership and Account Card Application.

Cancel Save

## 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*



Role: Member/Applicant ▼

- Member/Applicant
- Joint Owner 1
- Joint Owner 2

1

Primary

## Assign Roles to Template

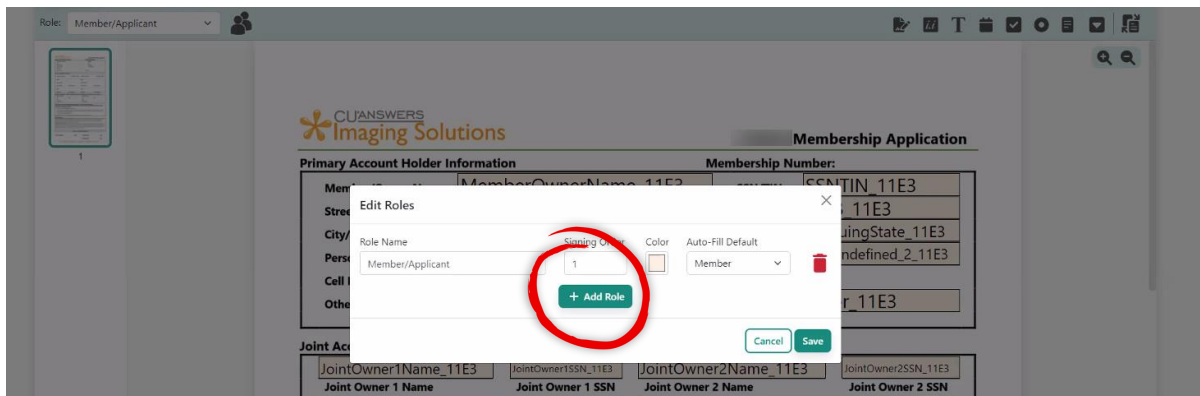
Roles indicate whether member or joint owner data will be populated. To assign roles, click the people icon in the upper left corner of the template screen.

*Add Roles to Template*



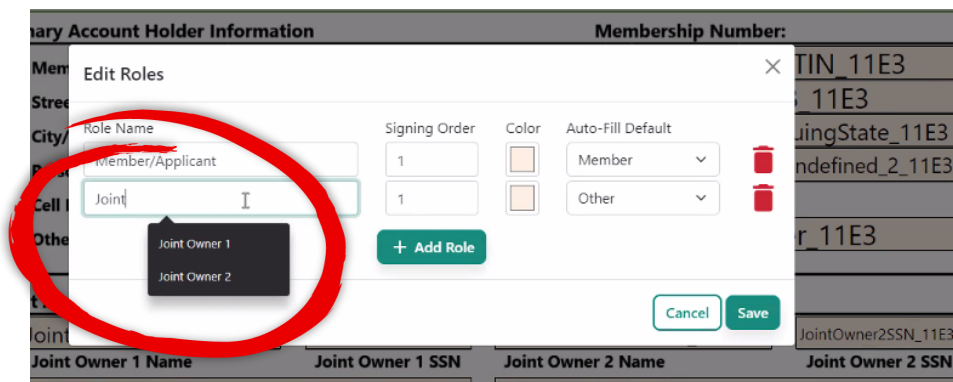
A window will appear allowing you to assign the roles. *Member/Applicant* is listed by default. To add joint owners to this form, click *Add Role*.

*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

Role Name	Signing Order	Color	Auto-Fill Default
Member/Applicant	1	Orange	Member
Joint Owner 1	1	Green	Joint Owner

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

Field Name	Field Type	CU*BASE Field	Role	Default Value	Field Locked	Required for Staff	eSign	Send for eSign	Required for eSign	Conditions	Size & Positioning
MemberOwnerName_11E3	Text	Type to search...	Member/Applicant		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Enabled By: Enter field name...	Left: 265, Top: 173, Width: 332, Height: 26

Click CU\*BASE Field to Reveal Listing

The screenshot shows the 'Edit Field' dialog box in the CU\*Forms application. The 'CU\*BASE Field' dropdown is highlighted with a red circle, indicating it is the field to click to reveal a listing. The dialog box contains various configuration options for the field, including Field Name, Field Type, Role, Default Value, Field Locked, Required for Staff, Send for eSign, Required for eSign, Conditions, Enabled By, Size & Positioning, and buttons for Delete Field, Cancel, and Save.

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

Shorten Field Listing

The screenshot shows the 'Edit Field' dialog box with the 'CU\*BASE Field' dropdown circled in red. The dropdown list is open, showing a search bar with the text 'name' and a list of fields including '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 desired field from the list.

### Select 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 field name will be updated.

### Field Mapped to 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

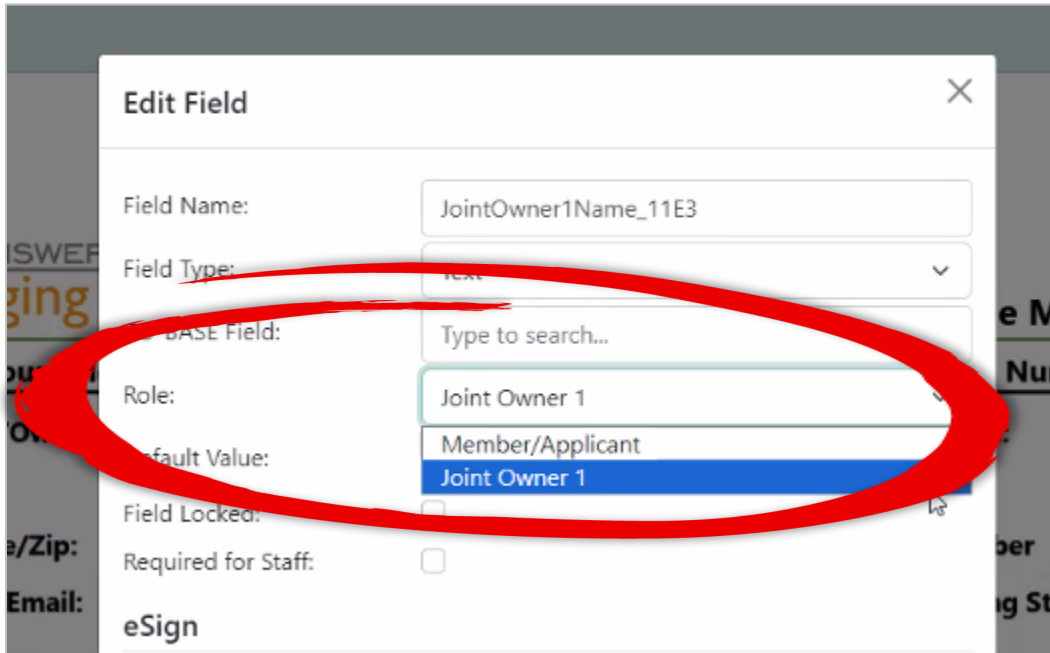
Continue this process until you have mapped all the needed fields.

## 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.

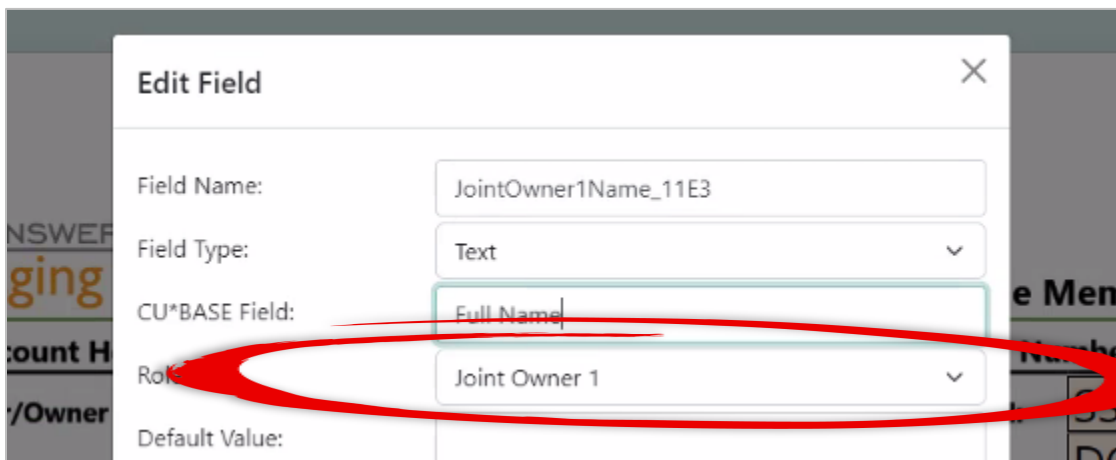
*Select Role for Field*



The screenshot shows the 'Edit Field' dialog box with the following fields: Field Name (JointOwner1Name\_11E3), Field Type (Text), CU\*BASE Field (Type to search...), Role (Joint Owner 1), Default Value (Member/Applicant), Field Locked (checkbox), Required for Staff (checkbox), and eSign. A red oval highlights the 'Role' dropdown menu, which is currently set to 'Joint Owner 1'.

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

*Joint Owner Field Populate*



The screenshot shows the 'Edit Field' dialog box with the following fields: Field Name (JointOwner1Name\_11E3), Field Type (Text), CU\*BASE Field (Full Name), Role (Joint Owner 1), and Default Value. A red oval highlights the 'CU\*BASE Field' dropdown menu, which is currently set to 'Full Name'.



## 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

The screenshot shows the 'Edit Field' dialog box with the following details:

- Field Name:** DOB\_2\_11E3
- Field Type:** Text
- CU\*BASE Field:** beneficiary (highlighted in the dropdown menu)
- 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:** 228
  - Top:** 771
  - Width:** 265
  - Height:** 27

Buttons at the bottom: Delete Field, Cancel, Save.

## Other Field Options

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

*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

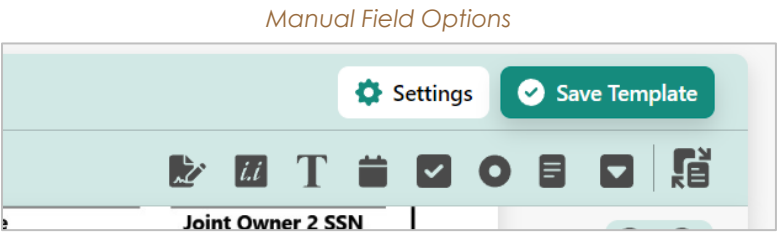
The following field-level settings can be granted.

## Field Settings










Field	Description
Default value	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

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*

The screenshot shows the 'Membership Form B' interface. At the top, there is a 'Back' button and a 'Settings' button. The 'Save Template' button is highlighted with a red circle. Below the header, there is a 'Role' dropdown menu set to 'Member/Applicant'. The main form area contains fields for 'Joint Owner 1 Name', 'Joint Owner 1 SSN', 'Joint Owner 2 Name', and 'Joint Owner 2 SSN'. The 'Joint Owner 1 Name' field is filled with 'Street 11E3'. The 'Joint Owner 1 SSN' field is filled with 'CityStateZip 2 11E3'. The 'Joint Owner 2 Name' field is filled with 'Street 2 11E3'. The 'Joint Owner 2 SSN' field is filled with 'CityStateZip 3 11E3'.

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

*Settings for Saving*

The screenshot shows the 'Settings for Saving' dialog box. The 'Active For Use' checkbox is checked. The 'Populate From CU\*BASE' checkbox is checked. The 'Document Indexes' section is expanded. The 'Storage Table' dropdown menu is highlighted with a red circle. Below the 'Storage Table' dropdown, there is a red error message: 'Please select an archive table to use.' The 'Index Name' and 'CU\*BASE Field' columns are listed. The 'Index Name' column contains 'Account', 'SSN', 'First\_Name', and 'Last\_Name'. The 'CU\*BASE Field' column contains 'Account Base', 'SSN / TIN / EIN', 'First Name', and 'Last Name'. The 'Required' column contains checkboxes for each field, all of which are checked. There is a red 'X' icon next to each checked checkbox. At the bottom of the dialog, there is an 'Add Index' button, a 'Cancel' button, and a 'Save' button.

Select the appropriate category from the drop-down menu.

### Select Storage Table

Index Name	CU*BASE Field	Required
Account	Account Base	✓
SSN	SSN / TIN / EIN	✓
First_Name	First Name	✓
Last_Name	Last Name	✓

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

Index Name	CU*BASE Field	Required
Account	Account Base	✓
SSN	SSN / TIN / EIN	✓
First_Name	First Name	✓
Last_Name	Last Name	✓

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

Settings 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

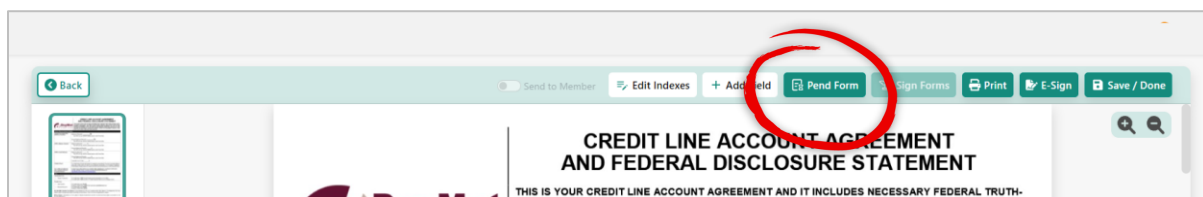
You can temporarily save an incomplete form to the pending area, for example, if you are waiting for a member to sign the form in branch,

- ▷ 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.

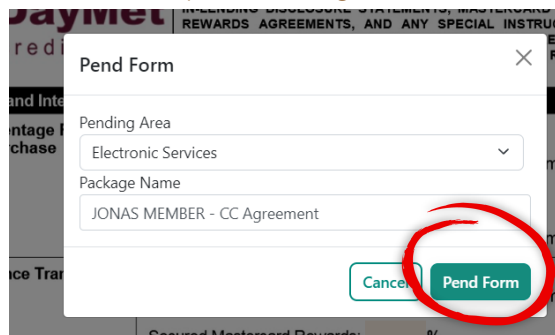
### Begin Pending Form Process



A screenshot of a web application interface for creating a form. The title is "CREDIT LINE ACCOUNT AGREEMENT AND FEDERAL DISCLOSURE STATEMENT". Below the title, it says "THIS IS YOUR CREDIT LINE ACCOUNT AGREEMENT AND IT INCLUDES NECESSARY FEDERAL TRUTH-". The top navigation bar includes buttons: "Back", "Send to Member", "Edit Indexes", "+ Add Field", "Pend Form" (circled in red), "Sign Forms", "Print", "E-Sign", and "Save / Done".

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

### Complete Pending Process



A screenshot of a "Pend Form" dialog box. It has a title bar with "Pend Form" and a close button. The dialog contains two input fields: "Pending Area" with a dropdown menu showing "Electronic Services", and "Package Name" with the text "JONAS MEMBER - CC Agreement". At the bottom right, there are two buttons: "Cancel" and "Pend Form" (circled in red).

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

#### *Pending Form Saved in Pending Area*

Pending

Manage Pending Areas

Pending Area

All

Search using keyword

Enter Keyword

⚠ Pended documents that have not been modified in 90 days will be deleted.

JONAS MEMBER - CC Agreement - 07/20/2023

ALYCIAM\_CUA860 (Electronic Services) ✓ ⓘ

## Retrieve Pending Forms

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

#### *Retrieve Form Saved in Pending Area*

CU\*Forms

Create Form View Pending eDoc Signature Admin

Upload

Pending

Manage Pending Areas

Pending Area

All

Search using keyword

Enter Keyword

⚠ Pended documents that have not been modified in 90 days will be deleted.

JONAS MEMBER - CC Agreement - 07/20/2023

ALYCIAM\_CUA860 (Electronic Services) ✓ ⓘ

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*

Pending

Manage Pending Areas

Pending Area

All

Search using keyword

Enter Keyword

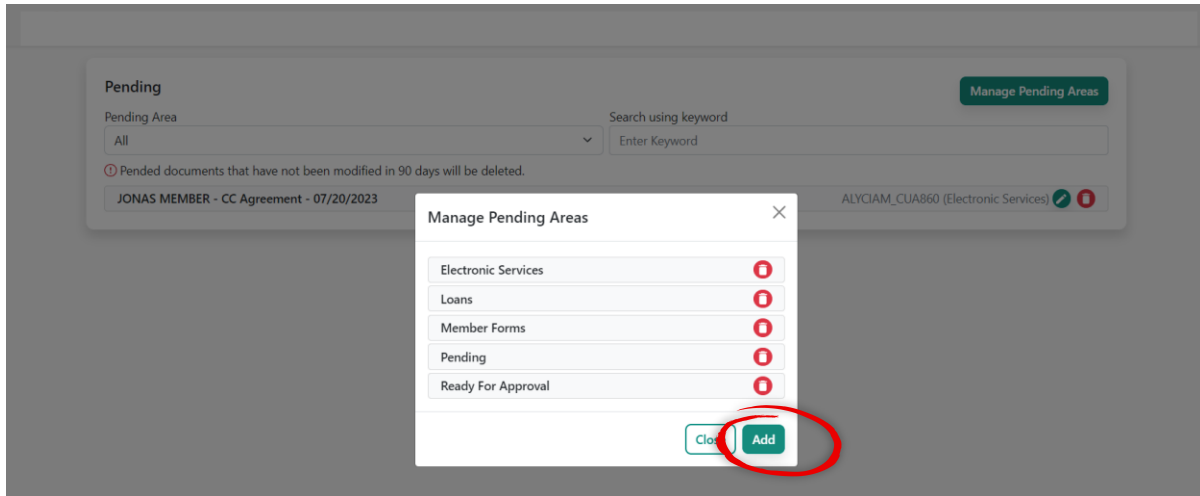
⚠ Pended documents that have not been modified in 90 days will be deleted.

JONAS MEMBER - CC Agreement - 07/20/2023

ALYCIAM\_CUA860 (Electronic Services) ✓ ⓘ

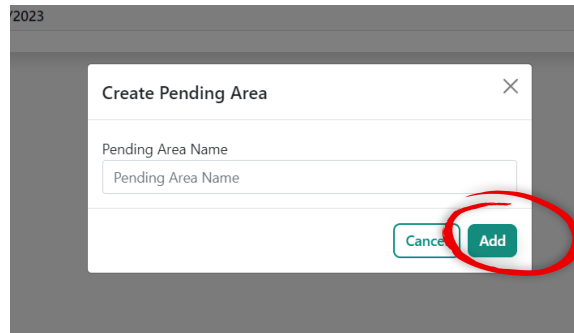
From the Pending area, click *Manage Pending Areas*.

### 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**.

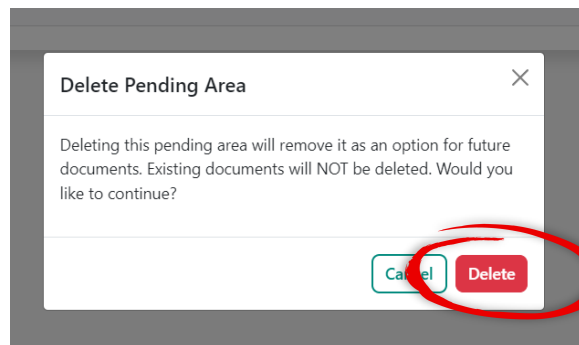
### Add New Sub Folder in Pending Area



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





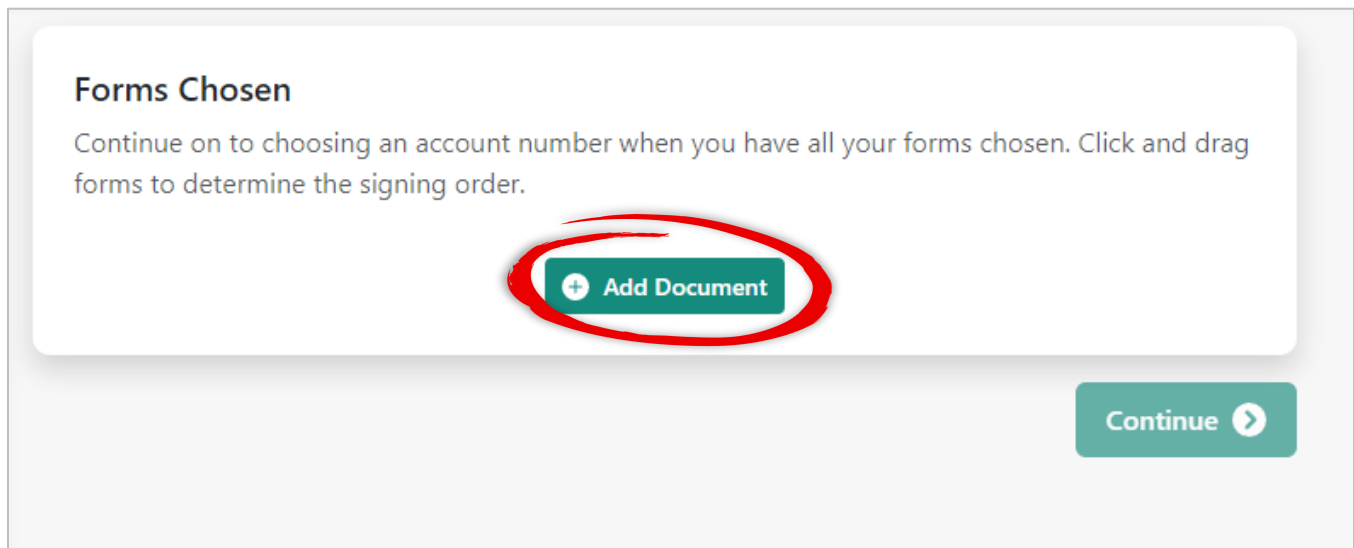
# Upload General Form for eSign

## 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.)

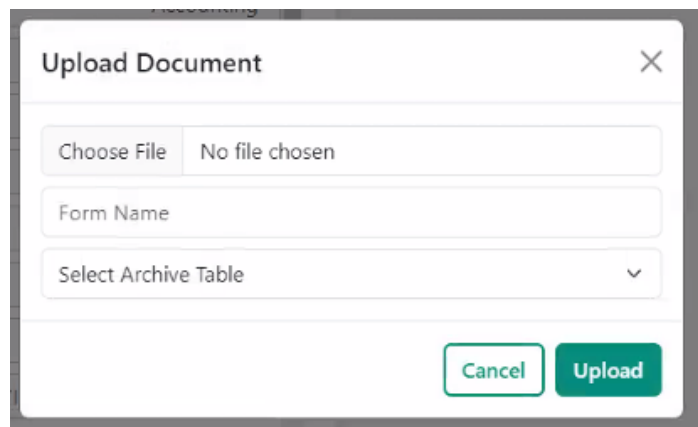
On the main create forms screen on the right panel, click *Add Document*.

*Select to Add Document*



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

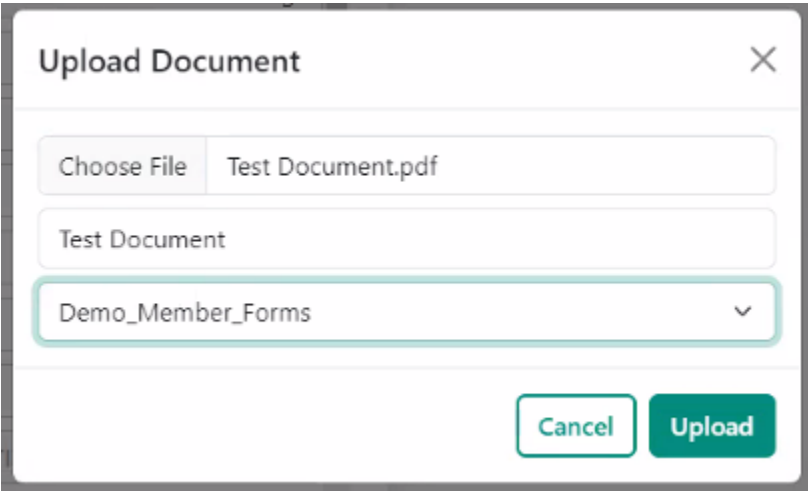
*Select the Form*



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

Below we see the form and archive table are selected.

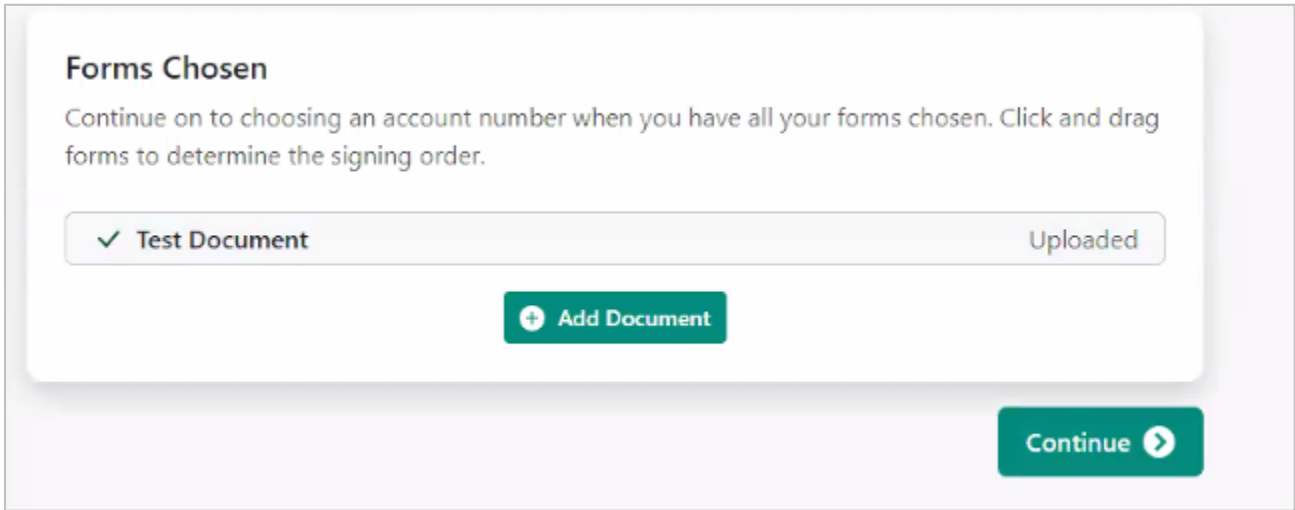
Form and Archive Table Selected



The 'Upload Document' dialog box features a title bar with a close button (X). Below the title bar, there is a file selection area with a 'Choose File' button and a text field containing 'Test Document.pdf'. Underneath, a text field displays 'Test Document'. A dropdown menu is open, showing 'Demo\_Member\_Forms' as the selected option, with a downward arrow on the right. At the bottom right, there are two buttons: 'Cancel' and 'Upload'.

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

Form Appears on List



The 'Forms Chosen' section has a title 'Forms Chosen' and a descriptive paragraph: 'Continue on to choosing an account number when you have all your forms chosen. Click and drag forms to determine the signing order.' Below this, a list item '✓ Test Document' is shown with a status 'Uploaded' on the right. A green button with a plus icon and the text 'Add Document' is centered below the list. At the bottom right, there is a green button with the text 'Continue' and a right-pointing arrow.

### 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

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.

✓ Test Document

Uploaded

✓ Membership Welcome Letter

Member Forms

✓ Membership Application

Member Forms

+

Add Document

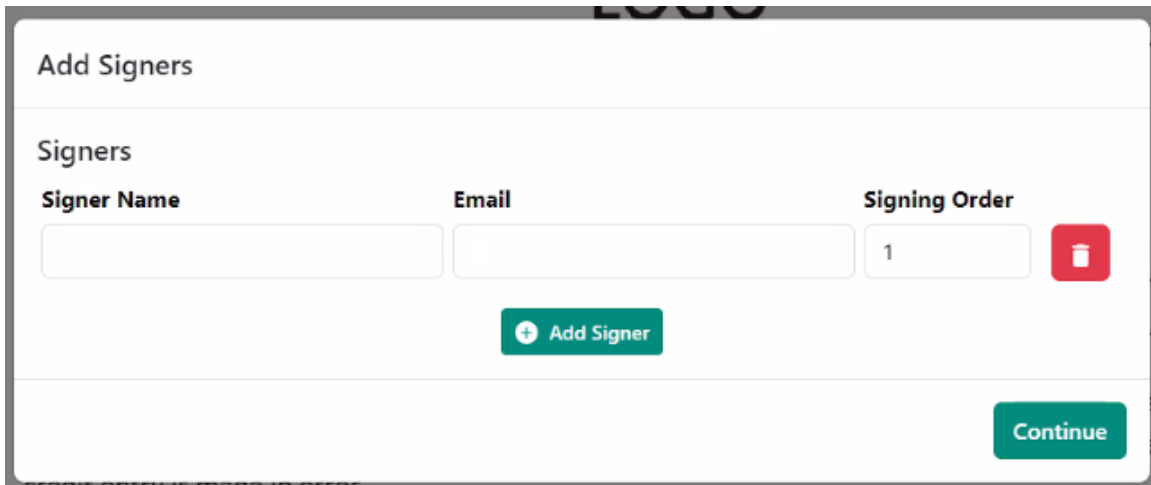
Continue

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*.

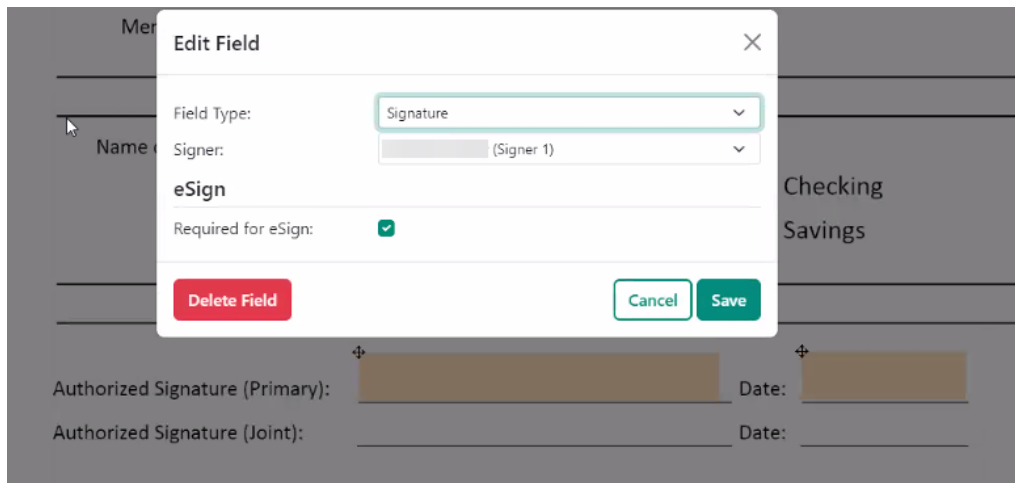
*Adding Signers*



The 'Add Signers' form contains a table with three columns: 'Signer Name', 'Email', and 'Signing Order'. The first row has empty input fields for the first two columns and the value '1' in the third. To the right of the table is a red trash icon. Below the table is a green '+ Add Signer' button. At the bottom right of the form is a green 'Continue' button.

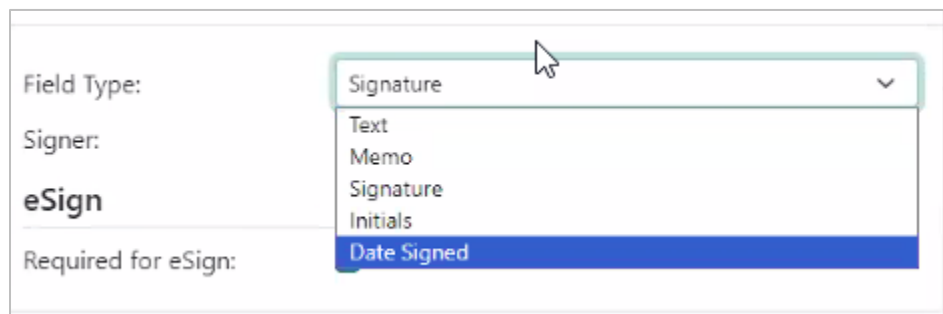
Then, click *Add Field* to add signer fields. Below is an example of a signature field and the possible types of signer fields you can add.

*Adding a Signer Field*



The 'Edit Field' dialog box shows 'Field Type' set to 'Signature' and 'Signer' set to '(Signer 1)'. Under the 'eSign' section, 'Required for eSign' is checked. At the bottom are 'Delete Field', 'Cancel', and 'Save' buttons. The background shows a form with fields for 'Authorized Signature (Primary)', 'Date', 'Authorized Signature (Joint)', and 'Date'.

*Possible Signer Fields*



The 'Field Type' dropdown menu is open, showing options: 'Text', 'Memo', 'Signature', 'Initials', and 'Date Signed'. 'Date Signed' is highlighted in blue.

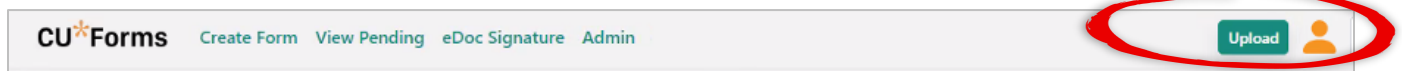
# Upload General Form for Archive

## 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.

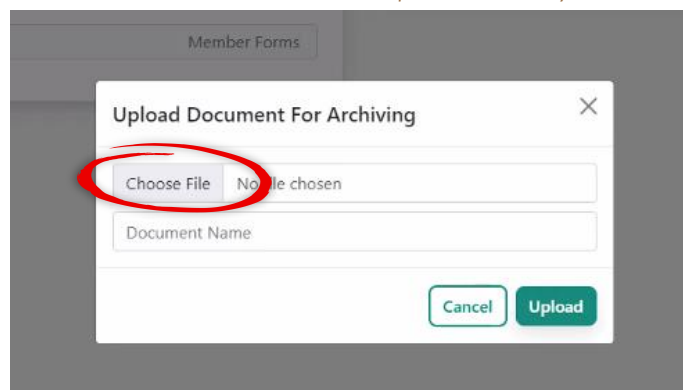
- ▶ This procedure allows you to upload a document to the vault but does not allow you to send it to members for eSignature. That was covered in the previous section.

*Upload a PDF to Create General Form*



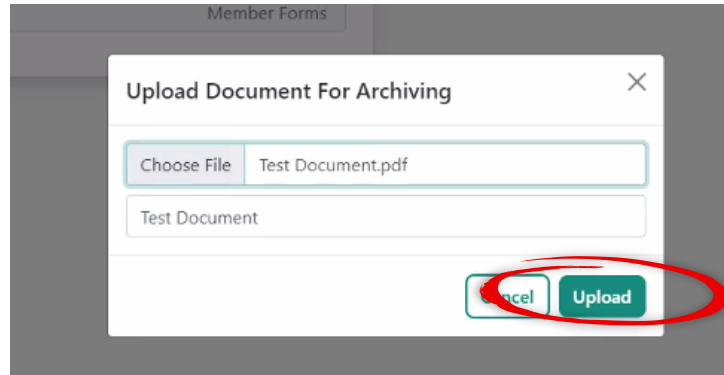
A window will appear allowing you to upload the PDF form.

*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



Member Forms

Upload Document For Archiving

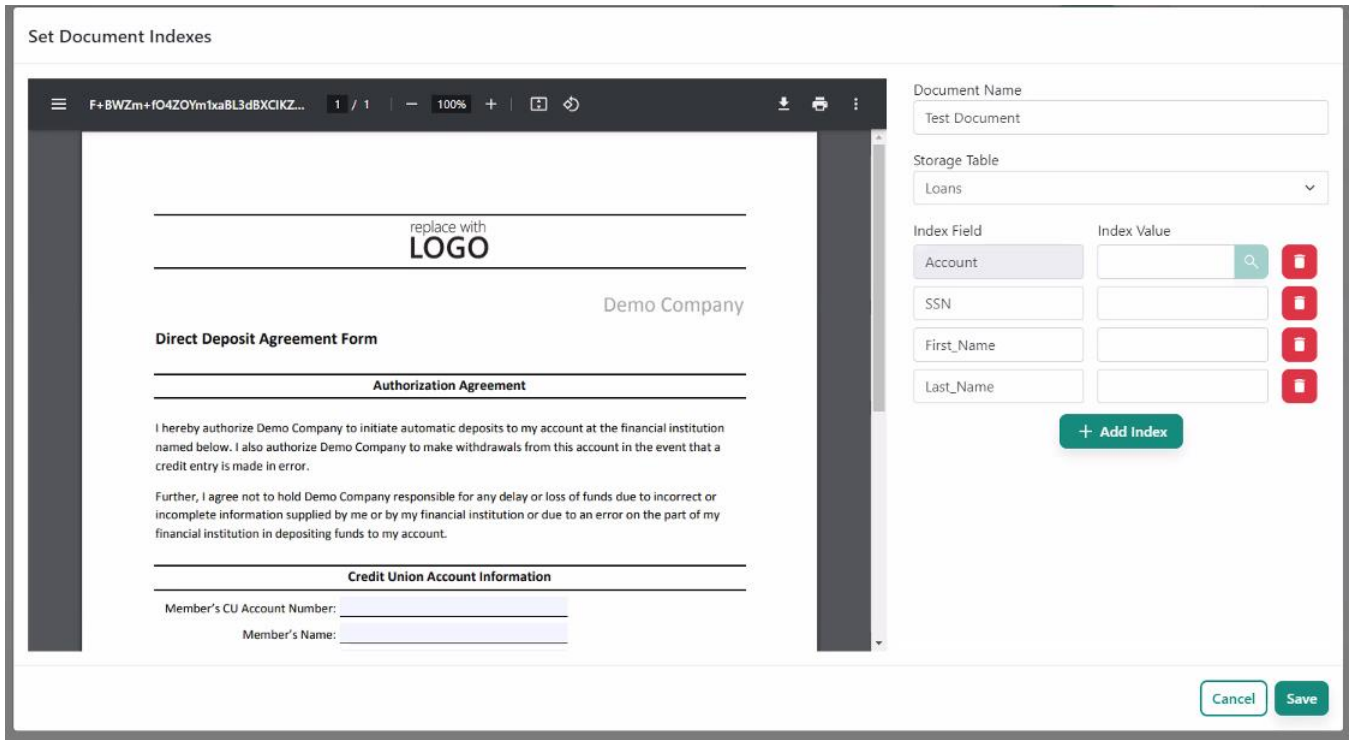
Choose File Test Document.pdf

Test Document

Cancel Upload

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

### Form Ready to Index



Set Document Indexes

Document Name  
Test Document

Storage Table  
Loans

Index Field	Index Value	
Account		
SSN		
First_Name		
Last_Name		

+ Add Index

Cancel Save

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: \_\_\_\_\_

## Enter Index Values for Archive

Set Document Indexes

F+8WZm+f04ZOYm1xaBL3dBXCIKZ... 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

Storage Table

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

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.

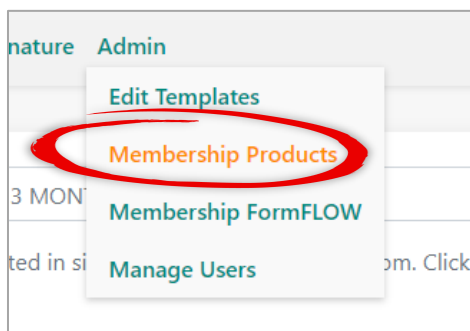
Administrator access is required for these two steps.

## 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.

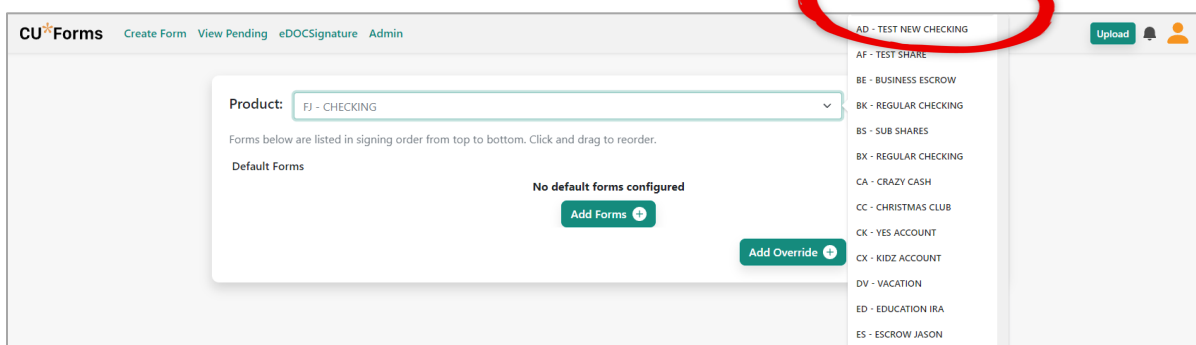
To begin the process of matching the product to the forms, select *Membership Products* under the Admin tab.

*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

CU<sup>+</sup>Forms Create Form View Pending eDOCSignature Admin Upload

Product: FJ - CHECKING Add Forms To Multiple

Forms below are listed in signing order from top to bottom. Click and drag to reorder.

Default Forms

No default forms configured

Add Forms + Add Override Save Configuration

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

## Forms Ready for Selection

Add Additional Forms

Form Group Member Forms Search using keyword Enter Keyword

Account Card	Member Forms
All Year Skip A Pay 2023 (INACTIVE)	Member Forms
Business Membership Application	Member Forms
Business Welcome Letter	Member Forms
CD Form (INACTIVE)	Member Forms
Certificate	Member Forms
IRATest (INACTIVE)	Member Forms
Membership Application	Member Forms
Membership Disclosures	Member Forms
Membership Welcome Letter	Member Forms
Overdraft Consent	Member Forms
Privacy Disclosure	Member Forms

Cancel Add Forms

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

### Select Forms From Listing (Sublist Selected)

**Add Additional Forms**

Form Group: Member Forms

Search using keyword: Enter Keyword

Form Name	Form Group
Account Card	Member Forms
All Year Skip A Pay 2023 (INACTIVE)	Member Forms
Business Membership Application	Member Forms
Business Welcome Letter	Member Forms
CD Form (INACTIVE)	Member Forms
Certificate	Member Forms
IRATest (INACTIVE)	Member Forms
Membership Application	Member Forms
Membership Disclosures	Member Forms
Membership Welcome Letter	Member Forms
Overdraft Consent	Member Forms
Privacy Disclosure	Member Forms

Buttons: Cancel, Add Forms

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

### Forms Attached to Product

**CU Forms** Create Form View Pending eDOCSignature Admin

Product: FJ - CHECKING Add Forms To Multiple

Forms below are listed in order from top to bottom. Click and drag to reorder.

Default Forms

Form Name	Form Group	Remove
Membership Disclosures	Member Forms	X
Membership Welcome Letter	Member Forms	X

Buttons: Add Forms, Add Override, Save Configuration

- ▷ 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*

The screenshot shows the CU\*Forms interface. At the top, there's a navigation bar with 'CU\*Forms', 'Create Form', 'View Pending', 'eDOCSignature', and 'Admin'. On the right, there are 'Upload', a bell icon, and a user profile icon. The main content area has a 'Product:' dropdown set to 'FJ - CHECKING' and an 'Add Forms To Multiple' button. Below this, a message states: 'Forms below are listed in signing order from top to bottom. Click and drag to reorder.' Under the heading 'Default Forms', there are two items: 'Membership Disclosures' and 'Membership Welcome Letter', each with a 'Member Forms' link and a gear icon. An 'Add Forms +' button is located below these items. At the bottom right, the 'Add Override +' button is circled in red, next to a 'Save Configuration' button.

CU\*Forms presents your configured Membership Designations.

### *Configured Membership Designations*

The screenshot shows a 'Select Membership Designations' dialog box overlaid on the CU\*Forms interface. The dialog box has a close button (X) in the top right corner. It contains a list of membership designations: BB - Business, BK - Bankrupt CH 7 Loss, BS - Business, CO - Corporation, CR - Conservatorship, CS - Custodial, DB - DBA, ES - Estate, EV - Finance emp, GU - Guardianship, LC - limited liability, and MI - Individual. At the bottom of the dialog box, there are 'Cancel' and 'Save' buttons.

Select the appropriate Membership Designation from the list and Save.

*Save Selected Designation(s)*

The screenshot shows a 'Select Membership Designations' dialog box. The background interface includes a 'Product' dropdown set to 'FJ - CHECKING', a list of 'Default Forms' (Membership Disclosures, Membership Welcome Letter), and buttons for 'Add Forms To Multiple', 'Member Forms' (with a gear icon), 'Override' (with a plus icon), and 'Save Configuration'. The dialog box contains a list of designations: BB - Business, BK - Bankrupt CH 7 Loss, BS - Business (highlighted), CO - Corporation, CR - Conservatorship, CS - Custodial, DB - DBA, ES - Estate, EV - Finance emp, GU - Guardianship, LC - limited liability, and MI - Individual. At the bottom of the dialog, the 'Save' button is circled in red.

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

*Select Alternative Forms for Membership Designation*

The screenshot shows a 'Select Alternative Forms for Membership Designation' dialog box. The background interface is the same as the previous screenshot. The dialog box contains a table of forms:

Form Name	Category
Business Membership Application	Member Forms
Business Service Agreement (INACTIVE)	Hamakua FCU
Business Welcome Letter	Member Forms
Cash Withdrawal Letter of Indemnification (INACTIVE)	GHS FCU
CC Plastic Card Dispute Form	Accounting Forms
CD Form (INACTIVE)	Member Forms
Certificate	Member Forms
Certificate Early Withdrawal Request (INACTIVE)	GHS FCU
Certificate Maturity Change (INACTIVE)	GHS FCU
Certification of Control of NPO (INACTIVE)	Hamakua FCU
Certification of Ownership and Control of Business (INACTIVE)	Hamakua FCU

At the bottom of the dialog, the 'Add Forms' button is circled in red.

The alternate forms will be shown below.

### Override Form Added

The screenshot shows the 'CU Forms' interface with the 'Override Form Added' title. The interface includes a top navigation bar with 'CU Forms', 'Create Form', 'View Pending', 'eDOCSignature', and 'Admin'. A 'Product' dropdown is set to 'FJ - CHECKING'. Below this, a list of 'Default Forms' is shown, including 'Membership Disclosures' and 'Membership Welcome Letter'. A red oval highlights the 'Add Forms' button next to the 'Business Welcome Letter' form. At the bottom, there are buttons for 'Add Override', 'Save Configuration', and 'Save Configuration'.

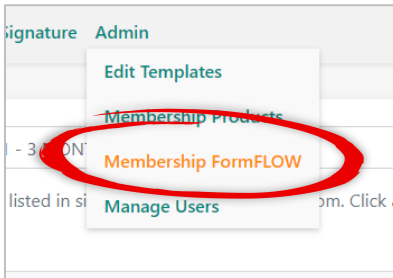
From here, you can also add additional forms as needed by clicking *Add Form*. When finished, select *Save Configuration*.

# Configure Audit Component

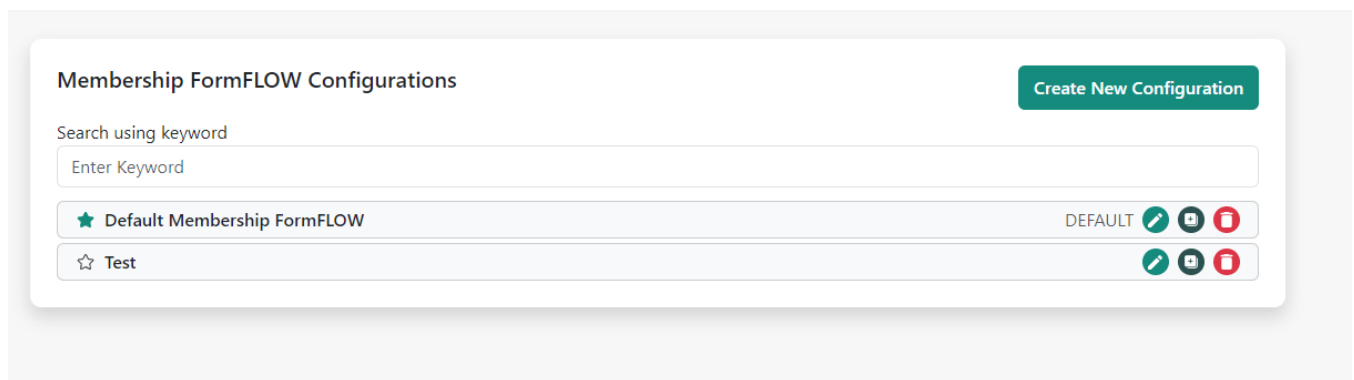
What makes FormFLOW so much more exciting is that it not only presents the appropriate forms at account opening but also provides an auditing feature.

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

The screenshot shows a web interface for configuring a Membership FormFLOW. At the top left is a 'Back' button. Below it is a text input field containing 'Membership FormFLOW Example' and a 'FormFLOW Settings' button. A message states: 'The checklist below is used for all Membership FormFLOWS. Click and drag steps to reorder them.' The main area contains two sections: 'Membership Checklist - Example' and 'Auditing Steps - Example'. Each section has a list of tasks with icons and reorder handles (gears and X's). The 'Membership Checklist' includes: 'Easily Request Documents from your Member.', 'Give directions to your staff on items you want them to complete.' (with sub-tasks: 'Ask member how they heard about our credit union.', 'Ask fraud and financial service questions.', 'Make sure that you complete "this task".'), 'Jump out to a website to streamline your process.', and 'Sign/View Required Documents.'. The 'Auditing Steps' include: 'Make audit steps for your staff after your member signs their documents.' (with sub-tasks: 'Verify name and address are spelled correctly in CU\*BASE.', 'Verify the \$5 par value has been placed in savings.', 'Verify debit card was created and sent to the member.') and 'Send a notification to your membership reviewer to verify the process.' (with a note: '(In configuration, add reviewer to user to use this notification step)'). At the bottom are 'Add Step' and 'Save Configuration' buttons.

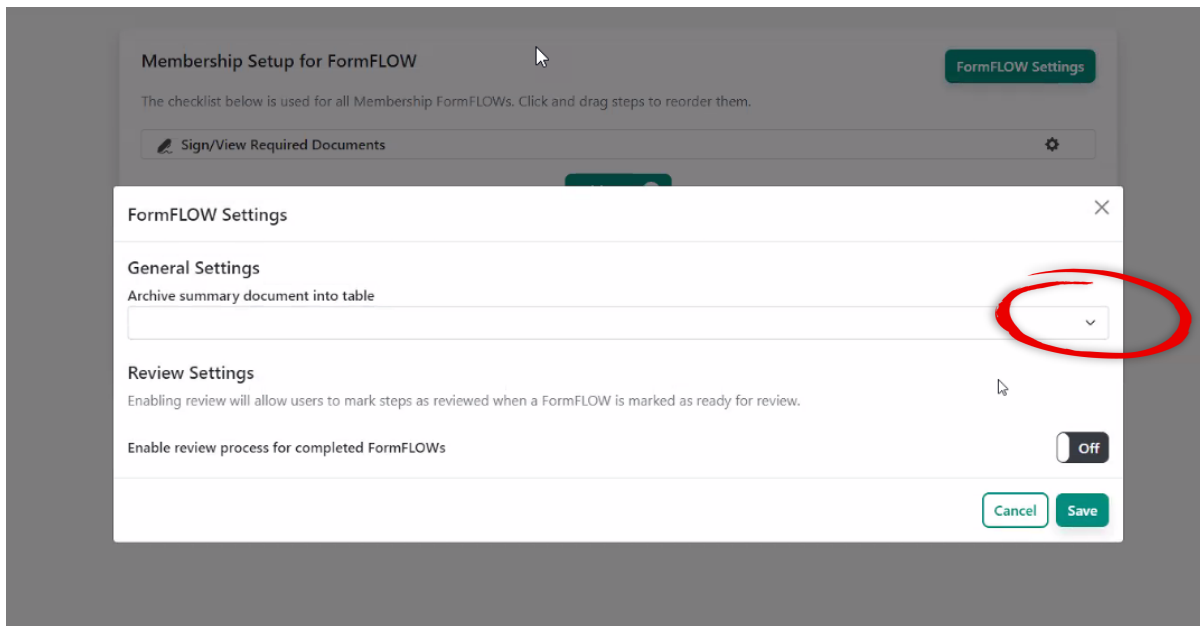
Below is an example of a completed checklist. To archive the checklist after the checklist is completed, click *FormFLOW Settings*. This will determine where your checklist document is saved and also allows you to send a notification to others to review and audit it.

#### Top of Checklist

The screenshot shows the top of a completed checklist. The header includes 'CU\*Forms' and navigation links: 'Create Form', 'View Pending', 'eDOCSignature', and 'Admin'. On the right are 'Upload', a bell icon, and a user icon. The main content area is titled 'Membership Setup for FormFLOW' and contains the same message as the previous screenshot: 'The checklist below is used for all Membership FormFLOWS. Click and drag steps to reorder them.' Below this is a table with two rows: 'Obtain the following documents' and 'Ask fraud and financial services questions.', each with a reorder handle. A red oval highlights the 'FormFLOW Settings' button in the top right corner of the checklist area.

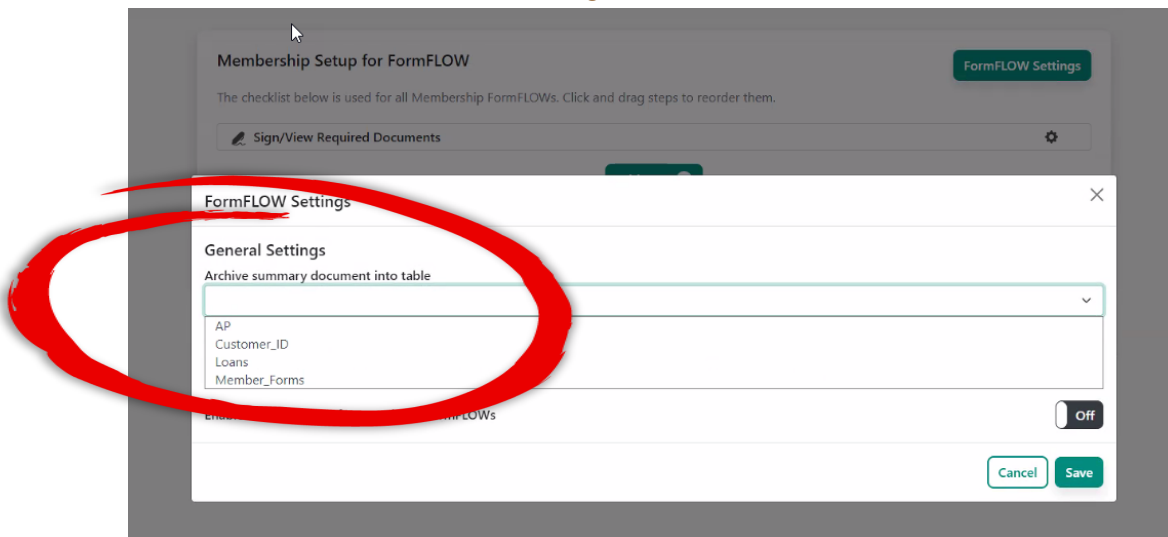
From here, you will enter the screen where you can configure the archive settings. First, select the table into which you want to archive the summary document.

### 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)

**Edit Step**

Phase: Auditing Steps - Example Add Phase

Name:   
Send a notification to your membership reviewer to verify the process.   
*(In configuration, add reviewer to user to use this notification step).*

Step Type: Review FormFLOW

Eligible Reviewers:   
The users below are allowed to review steps for this FormFLOW. If no users are specified, any user can review steps for this FormFLOW.   
Enter Username...

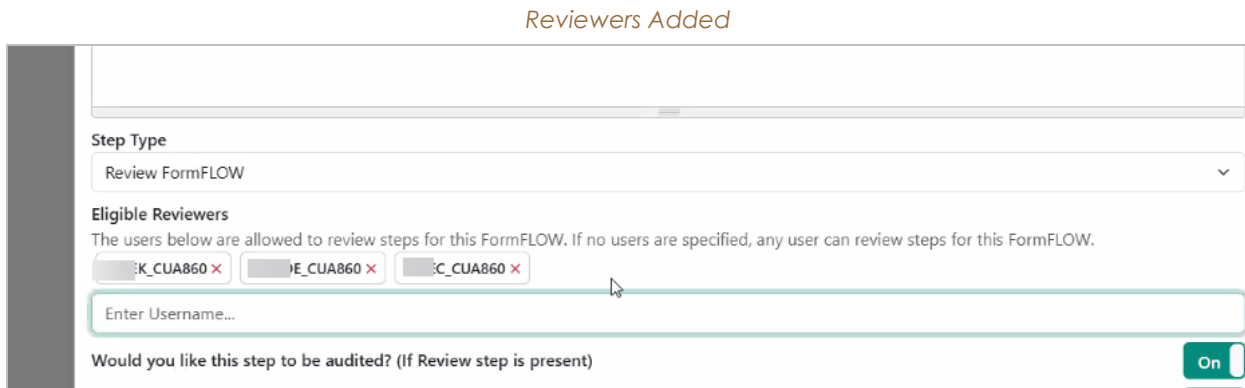
Would you like this step to be audited? (If Review step is present) On

Would you like to send a notification when this step is marked done? Off

Cancel Save

Add the reviewers.

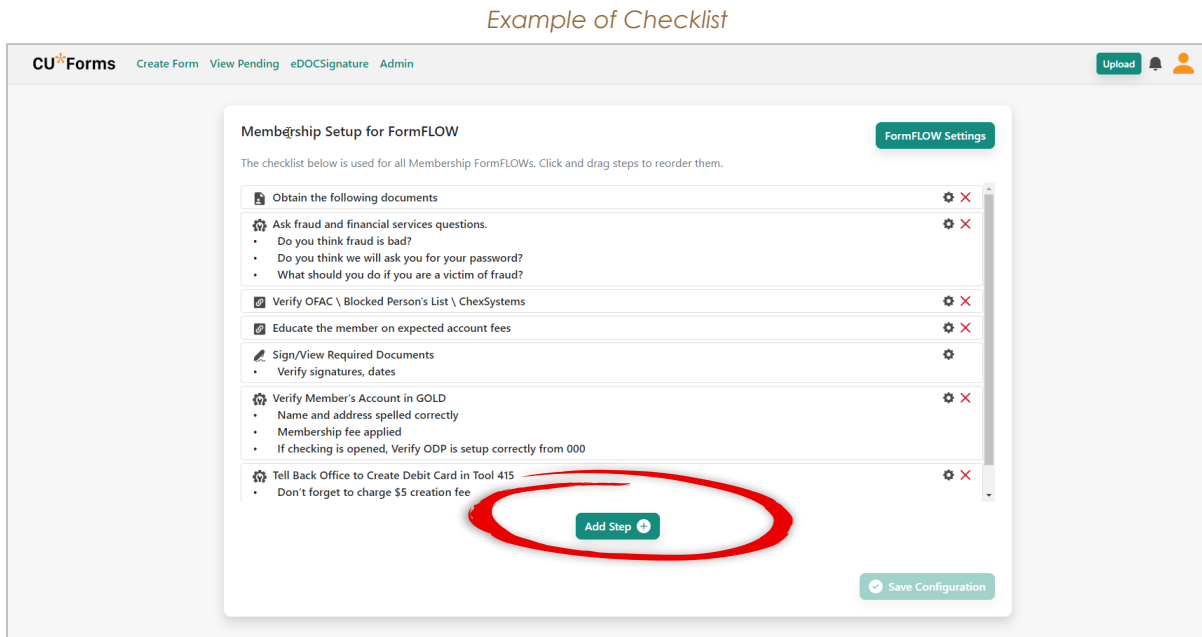
*Reviewers Added*



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)

**Add Step**

Phase  
Membership Checklist ▼ Add Phase +

Name

**B** **I** **U** 16 **A**

Step Type  
Custom Step ▼

Show a "To Do" checkbox next to this step. On

Would you like this step to be audited? (If Review step is present) On

Would you like to send a notification when this step is marked done? On

**User(s)**

**Message**

Cancel Add

- ▷ 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

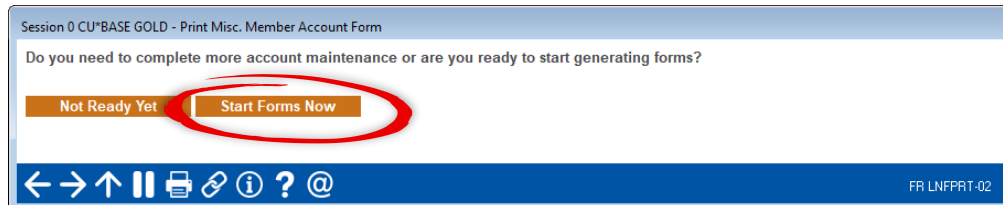
Once you have assigned forms to your products and set up your checklists, your frontline staff can use FormFLOW when opening new suffixes.

- ▷ 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*

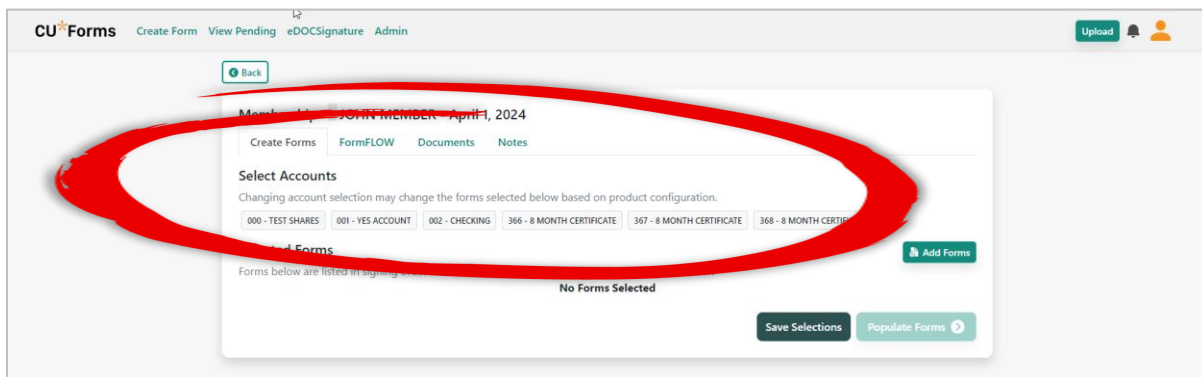
A screenshot of a web application window titled "Session 0 CU\*BASE GOLD - Print Misc. Member Account Form". The main content area asks the question "Do you need to complete more account maintenance or are you ready to start generating forms?". Below this question are two buttons: "Not Ready Yet" and "Start Forms Now". The "Start Forms Now" button is highlighted with a red circle. At the bottom of the window is a blue navigation bar with various icons (back, forward, up, down, print, etc.) and the text "FR LNFPRT-02" on the right.

## 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*

A screenshot of the "CU\*Forms" web application. The top navigation bar includes "CU\*Forms", "Create Form", "View Pending", "eDOCsSignature", and "Admin". On the right, there are buttons for "Upload", a bell icon, and a user profile icon. The main content area shows a "Back" button and a header for "Member: [REDACTED] - JOIN MEMBER - April 1, 2024". Below this is a tabbed interface with "Create Forms", "FormFLOW", "Documents", and "Notes". The "FormFLOW" tab is active, showing a "Select Accounts" section. This section includes a note: "Changing account selection may change the forms selected below based on product configuration." Below the note is a row of buttons representing different account types: "000 - TEST SHARES", "001 - YES ACCOUNT", "002 - CHECKING", "366 - 8 MONTH CERTIFICATE", "367 - 8 MONTH CERTIFICATE", and "368 - 8 MONTH CERTIFICATE". A red circle highlights the "Select Accounts" section. At the bottom right of the "Select Accounts" section is an "Add Forms" button. Below the account selection is a section titled "Selected Forms" which currently shows "No Forms Selected". At the bottom of the page are two buttons: "Save Selections" and "Populate Forms".

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

CU Forms Create Form View Pending eDOCSignature Admin Upload

Back

Membership - JOHN MEMBER - April 1, 2024

Create Forms FormFLOW Documents Notes

Select Accounts

Changing account selection may change the forms selected below based on product configuration.

000 - TEST SHARES 001 - YES ACCOUNT 002 - CHECKING 366 - 8 MONTH CERTIFICATE 367 - 8 MONTH CERTIFICATE 368 - 8 MONTH CERTIFICATE

Selected Forms

Forms below are listed in signing order from left to right, top to bottom. Click and drag to reorder.

Membership Welcome Letter Member Forms X Membership Application Member Forms X

Membership Disclosures Member Forms X

Signers

☒ Member/Applicant JOHN MEMBER john.members@test.com

☐ Joint Owner 1 Enter Full Name... Enter Email...

☐ Joint Owner 2 Enter Full Name... Enter Email...

Save Selections Populate 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

CU Forms Create Form View Pending eDOCSignature Admin Upload

Back

Membership - JOHN MEMBER - April 1, 2024

Create Forms FormFLOW Documents Notes

Select Accounts

Changing account selection may change the forms selected below based on product configuration.

000 - TEST SHARES 001 - YES ACCOUNT 002 - CHECKING 366 - 8 MONTH CERTIFICATE 367 - 8 MONTH CERTIFICATE 368 - 8 MONTH CERTIFICATE

Selected Forms

Forms below are listed in signing order from left to right, top to bottom. Click and drag to reorder.

Membership Welcome Letter Member Forms X Membership Application Member Forms X

Membership Disclosures Member Forms X

Signers

☒ Member/Applicant JOHN MEMBER john.members@test.com

☐ Joint Owner 1 Enter Full Name... Enter Email...

☐ Joint Owner 2 Enter Full Name... Enter Email...

Save Selections Populate Forms

# 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*

The screenshot displays the CU Forms web application. The top navigation bar includes 'CU Forms', 'Create Form', 'View Pending', 'eDOCsSignature', and 'Admin'. On the right, there are 'Upload', a notification bell, and a user profile icon. The main content area shows a 'Membership - JOHN MEMBER - April 1, 2024' form. Below the form title, there are tabs for 'Create Forms', 'FormFLOW', 'Documents', and 'Notes'. The 'FormFLOW' tab is active, showing a 'Checklist:' section. The checklist is organized into a table with 'To Do' and 'Action' columns. The tasks listed are: 'Obtain the following documents' (with sub-items 'Proof of Income', 'Verification of Residence', and 'Member ID'), 'Ask fraud and financial services questions' (with sub-items 'Do you think fraud is bad?', 'Do you think we will ask you for your password?', and 'What should you do if you are a victim of fraud?'), 'Verify OFAC \ Blocked Person's List \ ChexSystems', 'Educate the member on expected account fees', 'Sign/View Required Documents' (with sub-item 'Verify signatures, dates'), and 'Verify Member's Account in GOLD' (with sub-items 'Name and address spelled correctly' and 'Membership fee applied'). Each task has a checkbox in the 'To Do' column. To the right of the checklist, there are 'Upload' and 'Request' buttons. At the bottom right of the checklist area, there is a 'Close FormFLOW' button.

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 screenshot shows the 'Document Collection' interface for a member named 'JOHN MEMBER' on 'April 3, 2024'. At the top, there are tabs for 'Create Forms', 'FormFLOW', 'Documents', and 'Notes'. Below these is a 'Checklist' section with two main items: 'Obtain the following documents' and 'Ask fraud and financial services questions'. Under 'Obtain the following documents', there is a list of required documents: 'Proof of Income \*', 'Verification of Residence \*', and 'Member ID \*'. To the right of this list, there are two buttons: 'Upload' and 'Request'. These buttons are circled in red.

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 screenshot shows a 'Request Documents' modal form. It contains fields for 'Full Name' (JOHN MEMBER), 'Email Address' (john.members@test.com), 'Notification Type' (Email), and 'Auth Code' (170853). At the bottom right of the modal, there are two buttons: 'Cancel' and 'Request Documents'. These buttons are circled in red.

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

### Upload Document

The screenshot shows an 'Upload Documents' modal form. It has a section for 'Proof of Income' with a 'Choose File' button and a text area that says 'No file chosen'. At the bottom right of the modal, there are two buttons: 'Cancel' and 'Upload Documents'. These buttons are circled in red.

## 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

The screenshot shows a web application interface for a task titled "Membership - JOHN MEMBER - April 3, 2024". The interface includes tabs for "Create Forms", "FormFLOW", "Documents", and "Notes". A "Checklist:" section is visible, with a "Marked Done By:" notification box highlighted by a red circle. The notification box contains the text "Marked Done By: [redacted] (4/4/2024, 2:33 PM)". Below the notification, the checklist items are listed: "Obtain the following documents", "Proof of Income \*", "Verification of Residence \*", "Member ID \*", "Ask fraud and financial services questions.", "Verify OFAC \ Blocked Person's List \ ChexSystems", "Educate the member on expected account fees", and "Sign/View Required Documents". The "Obtain the following documents" item is checked, and the "Verify OFAC \ Blocked Person's List \ ChexSystems" item is also checked. The "Proof of Income \*", "Verification of Residence \*", and "Member ID \*" items are marked as "Uploaded". The "Ask fraud and financial services questions." item has sub-items: "Do you think fraud is bad?", "Do you think we will ask you for your password?", and "What should you do if you are a victim of fraud?". The "Verify OFAC \ Blocked Person's List \ ChexSystems" item has a checkbox that is checked. The "Educate the member on expected account fees" item has a checkbox that is checked. The "Sign/View Required Documents" item has a checkbox that is unchecked. The "Upload" and "Request" buttons are visible at the bottom right of the checklist section.

- ▷ 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

Membership - JOHN MEMBER - April 3, 2024

Create Forms FormFLOW Documents Notes

Checklist:

To Do Review Action

Upload Request

- ✓ ✓ Ask fraud and financial services questions.
  - Do you think fraud is bad?
  - Do you think we will ask you for your password?
  - What should you do if you are a victim of fraud?
- ✓ ✓ Verify OFAC \ Blocked Person's List \ ChexSystems
- ✓ ✓ Educate the member on expected account fees
- ✓ ✓ Sign/View Required Documents
  - Verify signatures, dates
- ✓ ✓ Verify Member's Account in GOLD
  - Name and address spelled correctly
  - Membership fee applied
  - If checking is opened, Verify ODP is setup correctly from 000
- ✓ ✓ Tell Back Office to Create Debit Card in Tool 415
  - Don't forget to charge \$5 creation fee
- ✓ ✓ Send Credit Union Member Sign up Gift
- ✓ ✓ Confirm all step are completed.
- ✓ ✓ Membership process is ready for review

Reviewed By: 1\_CUA999 (4/4/2024, 2:40 PM)

Close FormFLOW

## 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

CU Forms Create Form View Pending eDOCSignature Admin Upload

Membership - January 24, 2024

Create Forms FormFLOW Documents Notes

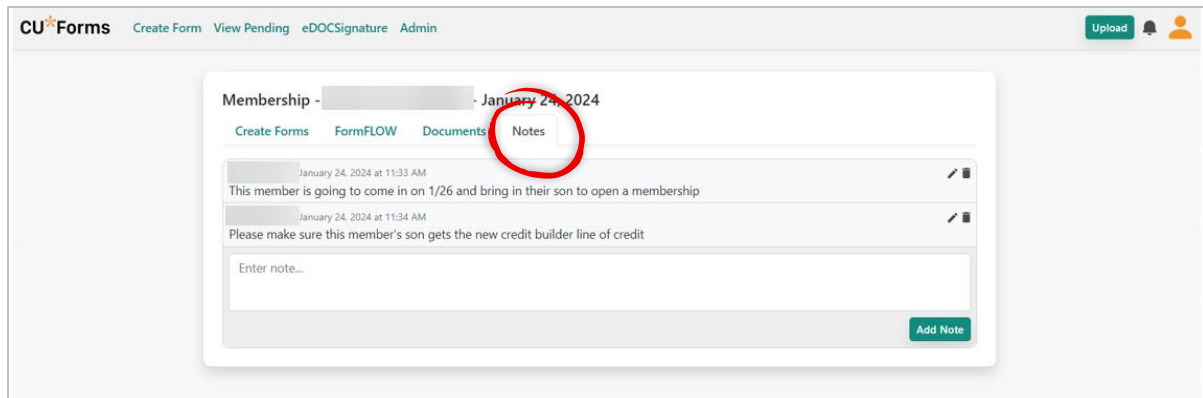
Created Documents Upload iDocVault Package eDOCSignature Package

Document Name	Action	Status	
Proof of Income	Requested	Waiting for Document	
Verification of Residence	Requested	Waiting for Document	
Member ID	Requested	Waiting for Document	
Membership Welcome Letter	Archived	Completed	View
Membership Application	Archived	Completed	View
Membership Disclosures	Archived	Completed	View
Certificate	Archived	Completed	View
Certificate	Archived	Completed	View

## Add Additional Notes

Click the *Notes* tab to add notes.

### Notes Tab



The screenshot displays the CU Forms application interface. At the top, a navigation bar includes the CU Forms logo and links for 'Create Form', 'View Pending', 'eDOCSignature', and 'Admin'. On the right side of the navigation bar are an 'Upload' button, a notification bell icon, and a user profile icon. The main content area shows a form titled 'Membership - [redacted] - January 24, 2024'. Below the title, there are four tabs: 'Create Forms', 'FormFLOW', 'Documents', and 'Notes'. The 'Notes' tab is selected and highlighted with a red circle. The notes section contains two entries, each with a timestamp and a note body. The first entry, dated 'January 24, 2024 at 11:33 AM', states 'This member is going to come in on 1/26 and bring in their son to open a membership'. The second entry, dated 'January 24, 2024 at 11:34 AM', states 'Please make sure this member's son gets the new credit builder line of credit'. Below the notes is a text input field with the placeholder 'Enter note...' and an 'Add Note' button.

CU Forms Create Form View Pending eDOCSignature Admin Upload

Membership - [redacted] - January 24, 2024

Create Forms FormFLOW Documents **Notes**

January 24, 2024 at 11:33 AM  
This member is going to come in on 1/26 and bring in their son to open a membership

January 24, 2024 at 11:34 AM  
Please make sure this member's son gets the new credit builder line of credit

Enter note...

Add Note

## Archive and Create Summary Document

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

*Exit FormFLOW*

A screenshot of a checklist interface. The checklist items are:

- If checking is opened, Verify ODP is setup correctly from 000
- ✓ Tell Back Office to Create Debit Card in Tool 415
  - Don't forget to charge \$5 creation fee
- ✓ Send Credit Union Member Sign up Gift
- ✓ Confirm all step are completed.
- ✓ Membership process is ready for review

In the bottom right corner, there is a green button labeled "Close FormFLOW" which is circled in red.

Check Archive Summary Document.

*Select Archive Summary Document*

A screenshot of a "Close FormFLOW" dialog box. The dialog box contains the text "Are you sure you'd like to close this FormFLOW?" and a checkbox labeled "Archive Summary Document". The checkbox is currently unchecked and is circled in red. There are "Cancel" and "Close" buttons to the right of the checkbox.

Click *Close*.

*Close FormFLOW*

A screenshot of the "Close FormFLOW" dialog box. The checkbox "Archive Summary Document" is now checked. The "Close" button is circled in red.

Below is an example of an archived summary document.

Summary Report Example

View

1881D23D94D5421F91E645D21AF6CE8B.pdf1 / 2100%+

Membership FormFLOW Audit Summary

K1- January 24, 2024

Steps

Obtain the following documents

- Step was not completed
- Step was not reviewed

Requested/Uploaded Documents

- Proof of income
  - Document not requested or uploaded
- Verification of Residence
  - Document not requested or uploaded
- Member ID
  - Document not requested or uploaded

Ask fraud and financial services questions.

- Do you think fraud is bad?
- Do you think we will ask you for your password?
- What should you do if you are a victim of fraud?

Marked Done By: X\_CUA999 (01/24/2024 15:21 UTC)

Reviewed By: C\_CUA999 (01/24/2024 19:49 UTC)

Verify OFAC \ Blocked Person's List \ ChexSystems

- Marked Done By: KYLEK\_CUA999 (01/24/2024 15:21 UTC)
- Reviewed By: KYLEK\_CUA999 (01/24/2024 19:49 UTC)

Educate the member on expected account fees

- Marked Done By: CUA999 (01/24/2024 15:22 UTC)
- Reviewed By: CUA999 (01/24/2024 19:49 UTC)

Sign/View Required Documents

- Verify signatures, dates
- Marked Done By: X\_CUA999 (01/24/2024 15:21 UTC)
- Reviewed By: C\_CUA999 (01/24/2024 19:49 UTC)

Verify Member's Account in GOLD

- Name and address spelled correctly
- Membership fee applied
- If checking is opened, Verify ODP is setup correctly from 000
- Marked Done By: K\_CUA999 (01/24/2024 15:21 UTC)
- Reviewed By: C\_CUA999 (01/24/2024 19:49 UTC)

Tell Back Office to Create Debit Card in Tool 415

- Don't forget to charge \$5 creation fee
- Marked Done By: X\_CUA999 (01/24/2024 15:21 UTC)
- Reviewed By: C\_CUA999 (01/24/2024 19:49 UTC)
- Step was not completed

Add to My ListMoveDeleteDownloadSave

Current TableMember\_Forms

Account

SSN

First Name

Last Name

Other

FormCUForms Membership FormFLOW Audit Sumi

Created On2024-01-24 14:49:23

Created By

\_Doc\_ID1EFDD3

Pkg\_ID

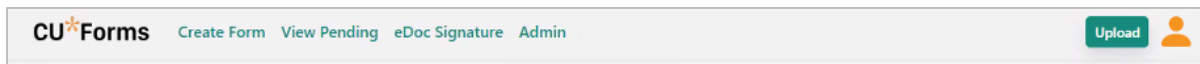
# Manage Users

## 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*

A screenshot of the 'Manage Users' form. It features a search bar at the top with a dropdown menu and a red delete icon. Below this, the form is divided into sections: 'Info' with fields for 'eDOC User' and 'Email Address', 'Full Name', and 'Default Form Group'. A 'History' button is located at the bottom left of the form. On the right side, there is a 'Permissions' section with three checked items: 'Build Templates', 'Manage Users', and 'Manage Pending'. A 'Save' button is at the bottom right.

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.

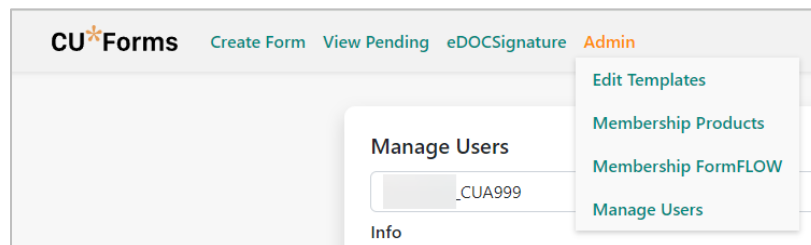
Field	Description
Manage Pending	This permission allows the user to create new pending areas and delete current ones.

## 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 Permissions 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.