# CU*Forms


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

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

**CU*Forms** is a web application that allows credit unions to build their very own membership form templates, which staff can use to prepare documents for signing. Once documents are prepared, members may sign with Topaz signature pads and/or eDOCSignature eSign. The template creator has access to over 150 CU*BASE data points for general membership data like account, SSN, first name, last name, and address to automatically fill forms.  You can also manually upload and index forms for archival.

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

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

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# Getting Started

## Learn More About **CU*Forms**

## Get Started by Signing Up on the Online Store

To get started with **CU*Forms**, sign up on the CU*Answers Online store page: https://store.cuanswers.com/product/cuforms/. There is a one-time $250 setup fee.

## Check out the Quick-Guide Video Library

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

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

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

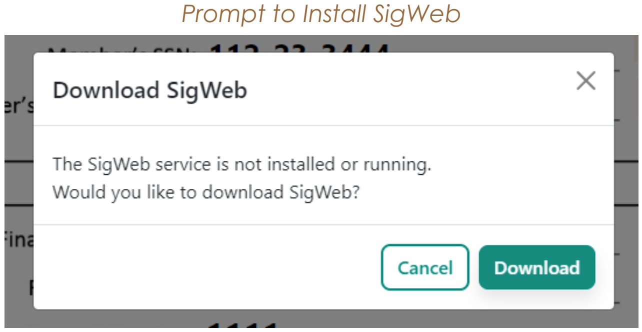
## Over 150 Data Fields Populated from CU*BASE to Form Listing

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

## SigWeb Installation

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

*Prompt to Install SigWeb*



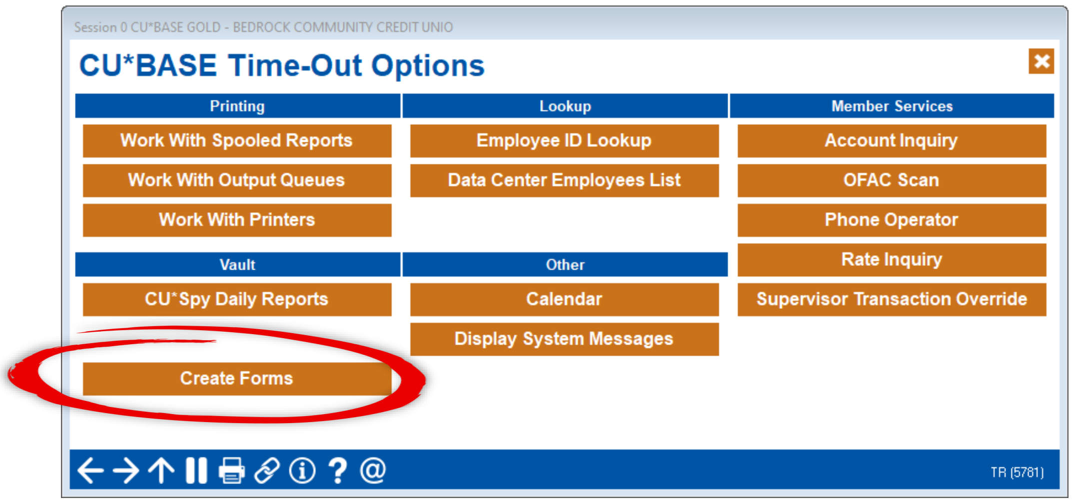

Simply select the download button to download and install SigWeb. You will require administrative permissions to install this software.

# Accessing **CU*Forms**

## Getting into the Software

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

*Access **CU*Forms** from the Timeout Window*

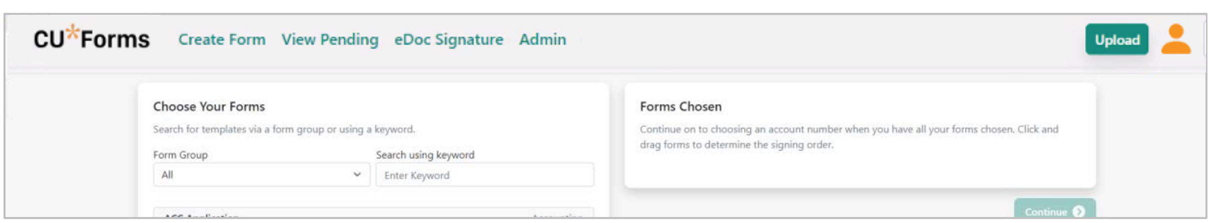



- If you are not set up with **CU*Forms**, you will be redirected to the store page to sign up for the feature.

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

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

*Permissions for a Admin User - All Access Granted*




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

# Filling in a Form

## And Sending it to a Member

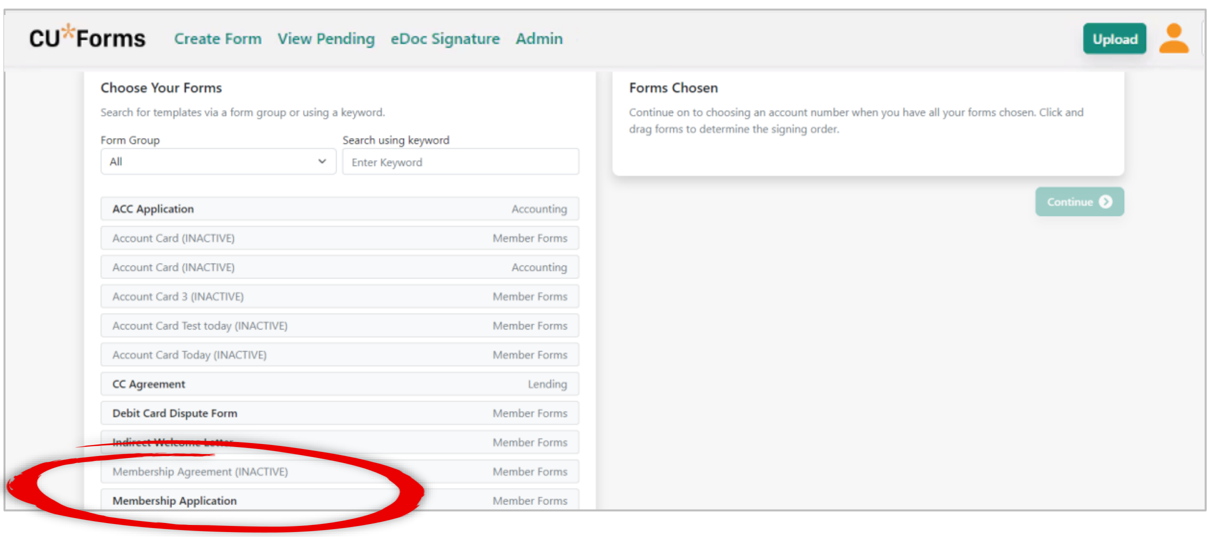
This section of the booklet covers selecting a pre-programmed form in **CU*Forms** and importing member data. It also covers signing the form, sending it out for signature, and saving and printing the form.

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

## Selecting a Form

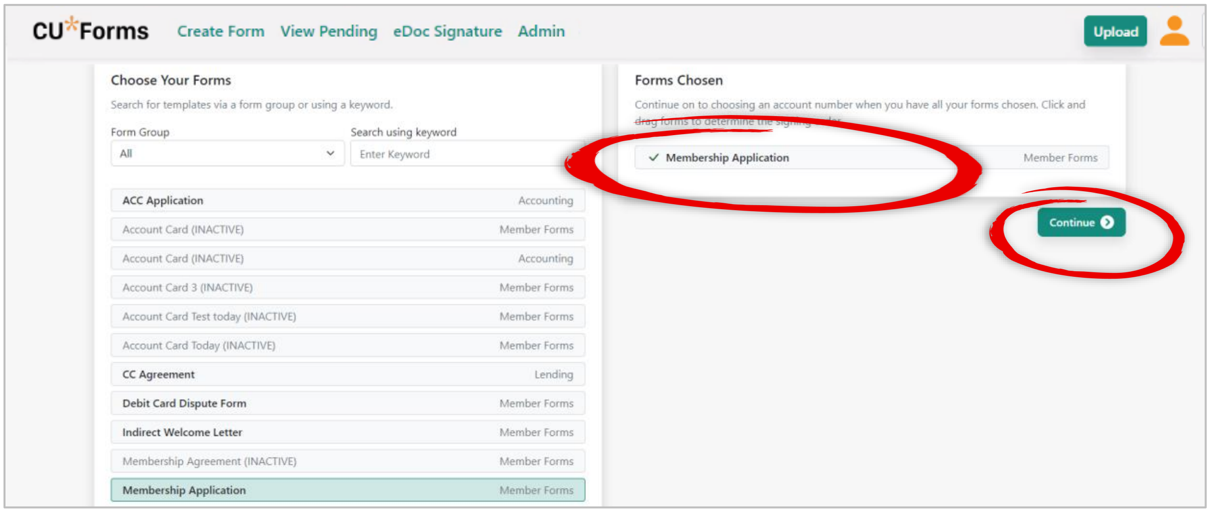
The entry screen lists the categories of forms available in **CU*Forms**. Any marked as Inactive are not available.

*Begin by Selecting an Active Form*




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

*Select the Form*

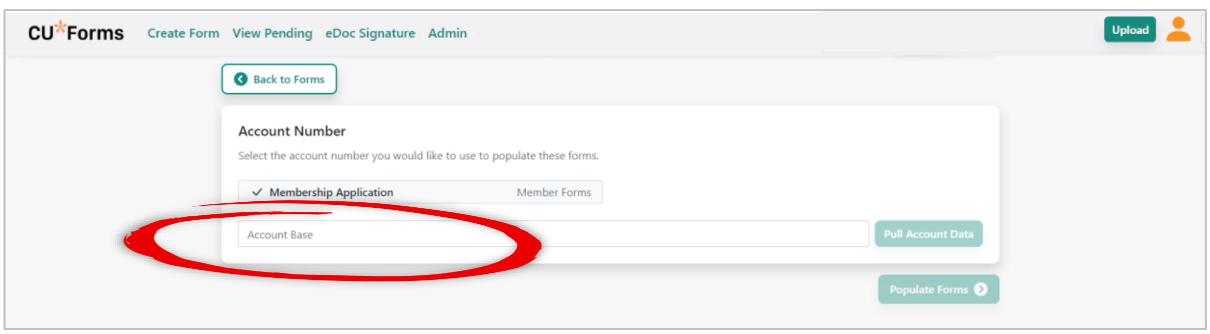



Click *Continue*.

# Completing the Form and Importing the Member Data

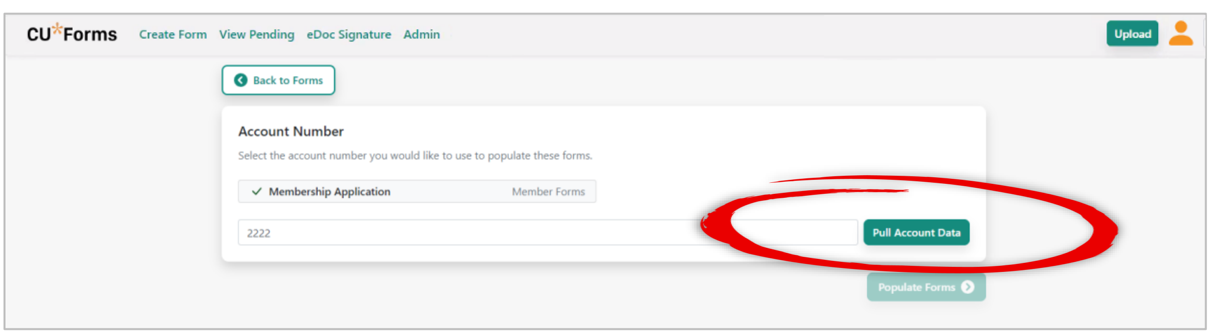
If the form has been programmed to accept CU*BASE data, the system will ask for the account base. That way you can designate what membership data will be populated on the form.

*Enter the Account Base to Populate the Form*




Enter your account base.

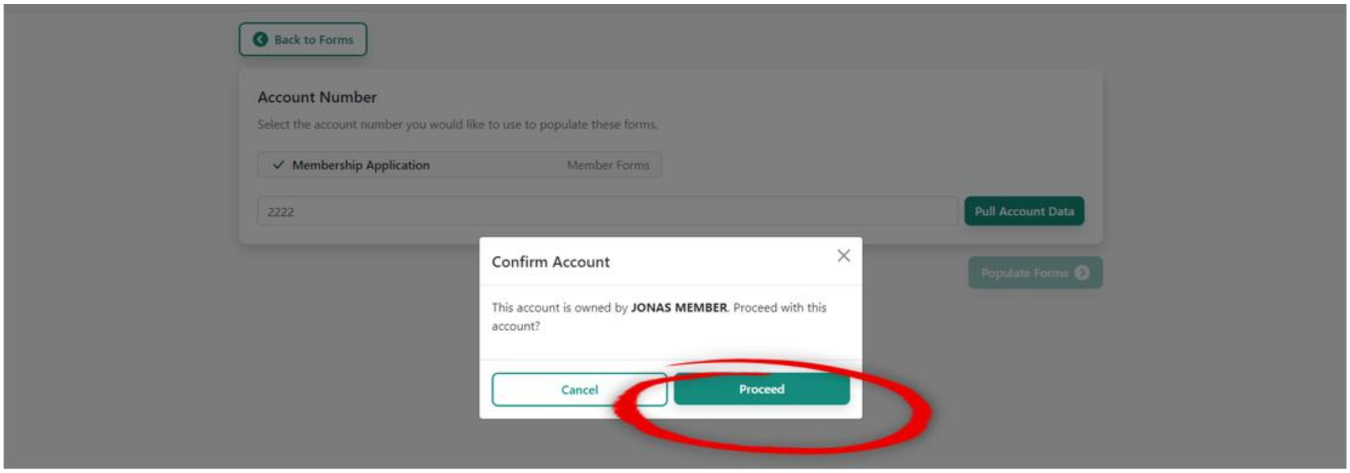
*Pull the Data into the Form*




Click *Pull Account Data*.

A confirmation window will appear showing the member name.

*Confirm the Member Name*

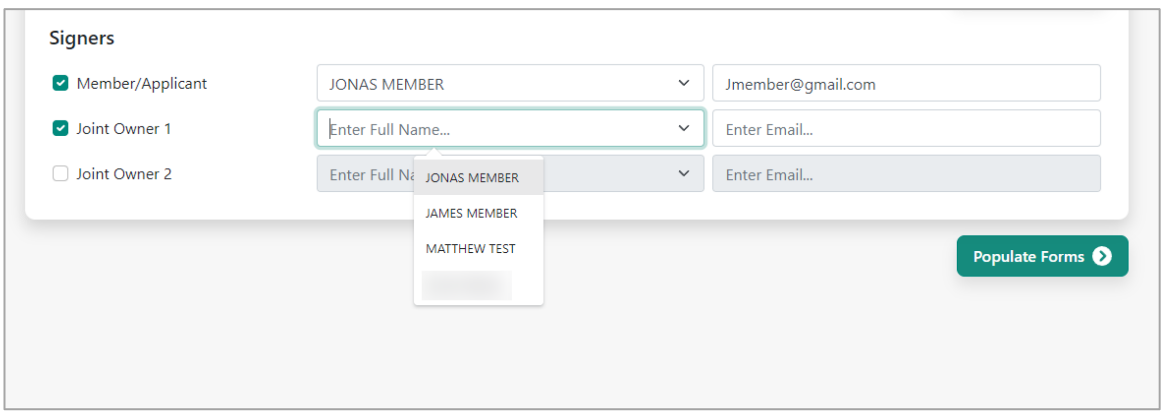



Confirm the correct member was selected by clicking *Proceed*.

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

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

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

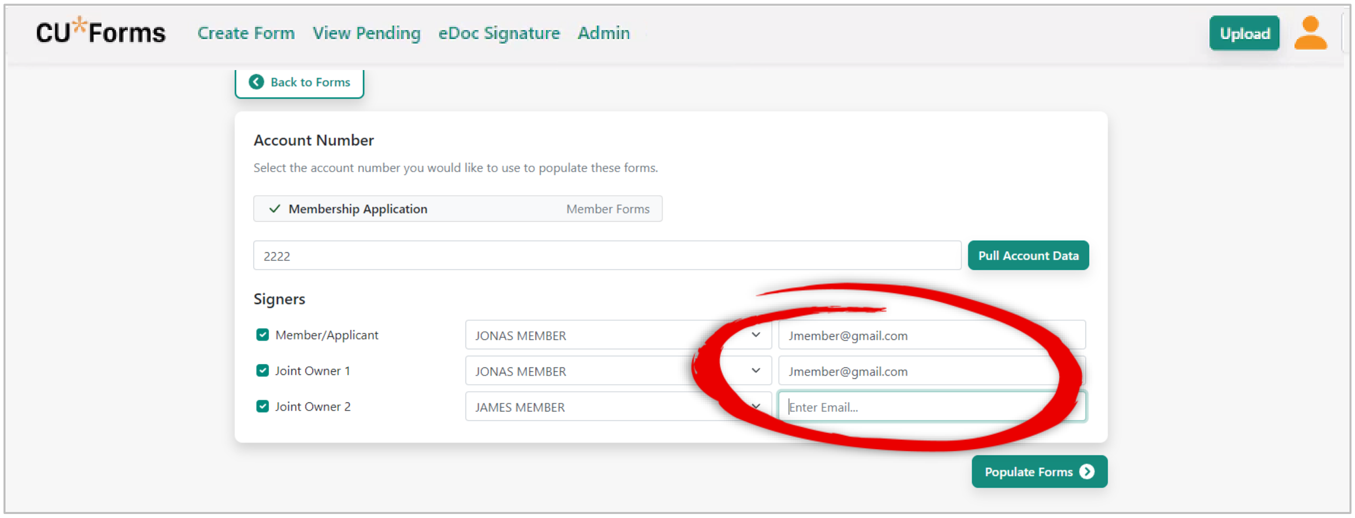



- ▷ You can also include names that are not included in CU*BASE.

You may edit the email addresses as needed.

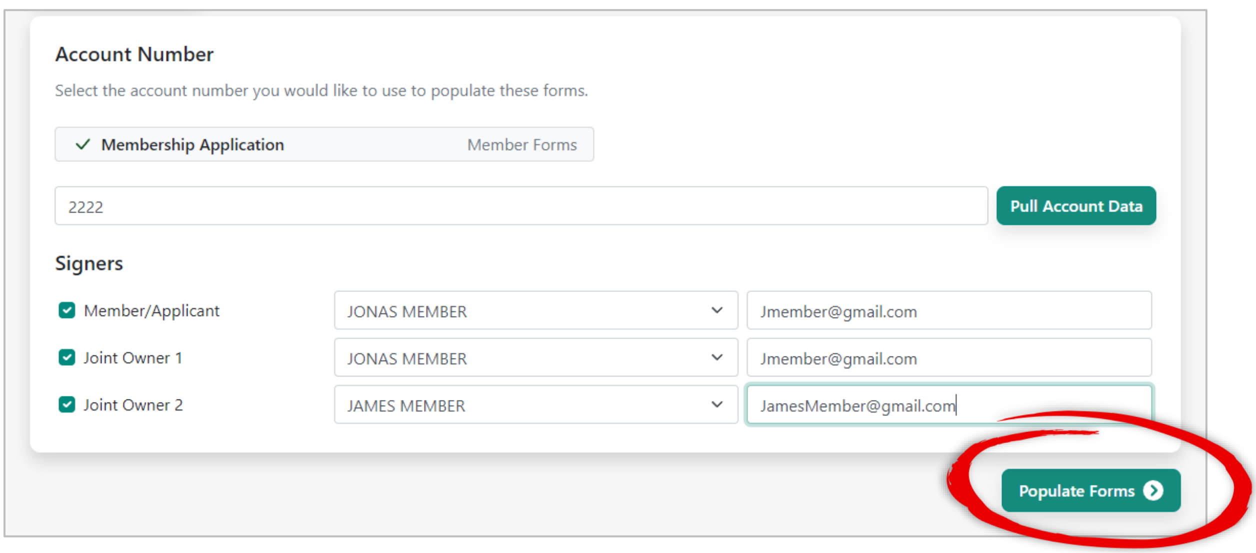
▷ IMPORTANT NOTE: This will not update the email address in CU*BASE.

*Edit or Add Any Email Addresses*




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

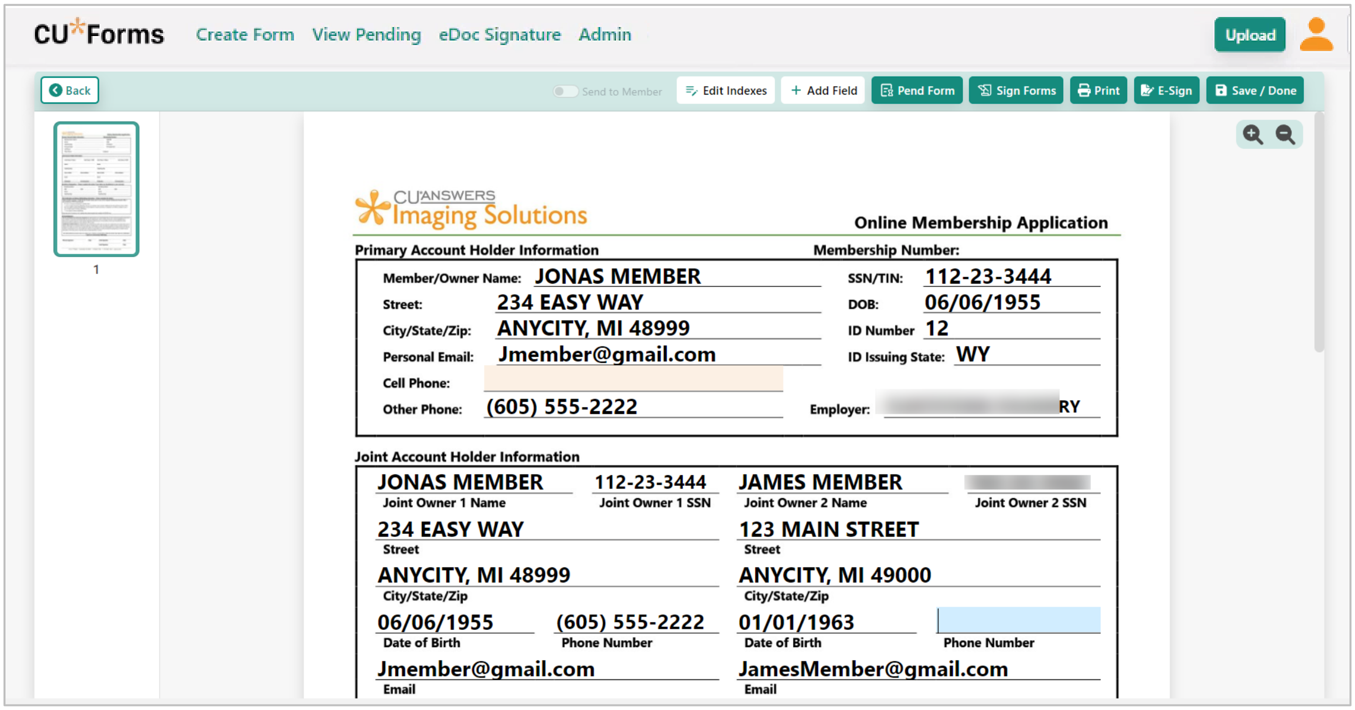
*Populate the Form with Data from CU*BASE*




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

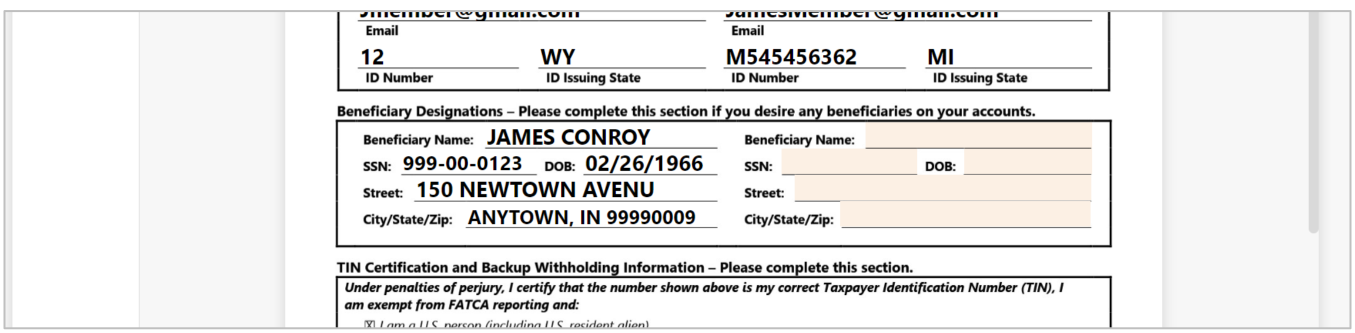
The populated data appears in **CU*Forms** where the fields are mapped. (See next section on building the template.)

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



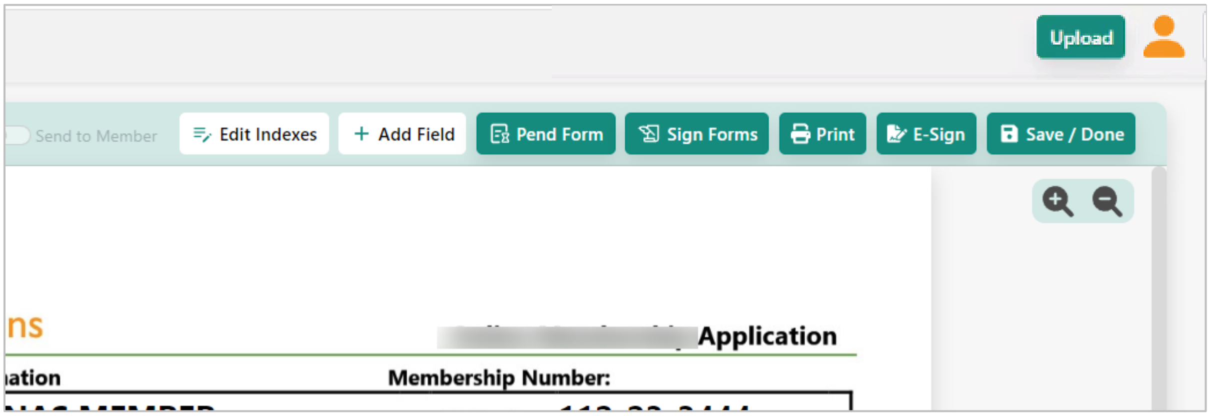

Since this form has beneficiary fields programmed, the beneficiary data is populated a well. (Learn more about programming beneficiary fields on page 21.)

*Beneficiary Data Appears on the Form Where Beneficiary Fields Are Mapped*




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

*Buttons at the Top While Working the Form*




There are several buttons in the upper right-hand corner of the form. Having members sign the form is covered below. Placing the form temporarily in the Pending area is covered on page 27.

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

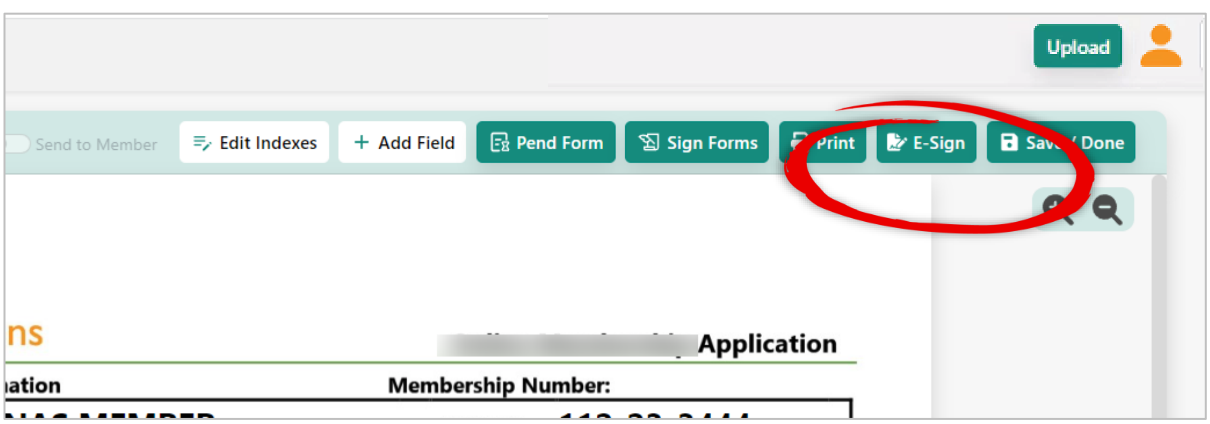
# Signing Form in Branch

You can set fields in a form to require a signature. If you advance to a signature field and have your configured signature pad ready, your member can sign the form in branch. You can also advance directly to these fields by clicking *Sign Form* at the top of the form. (See image above.)

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

# Sending Form for eSign

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

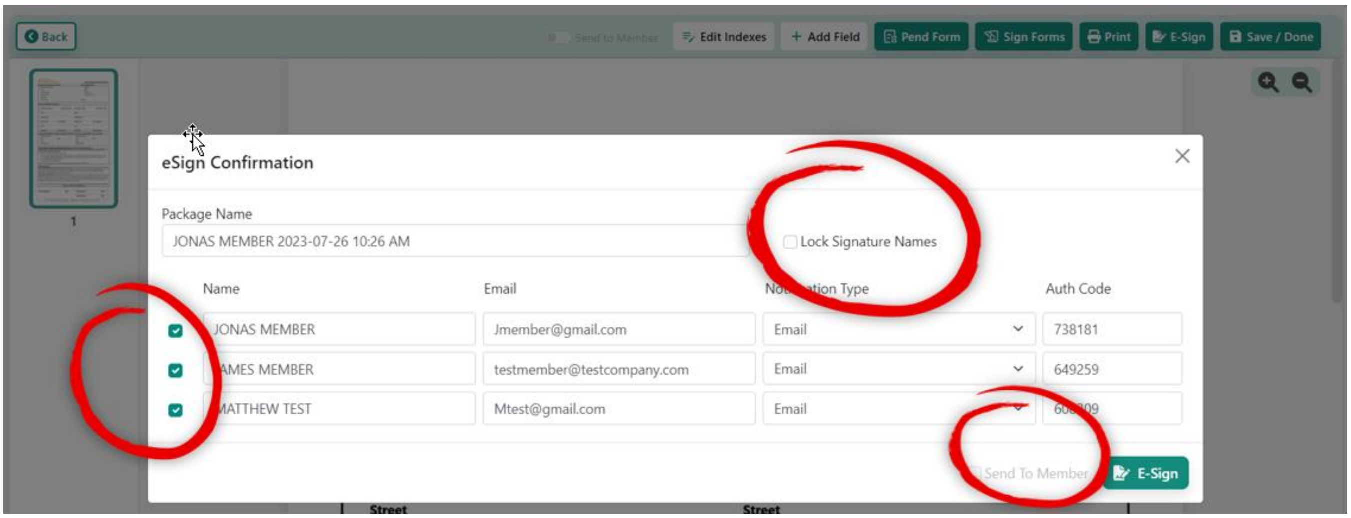


Select the persons to receive the form by checking the boxes in front of their names.

You can also select the following boxes.

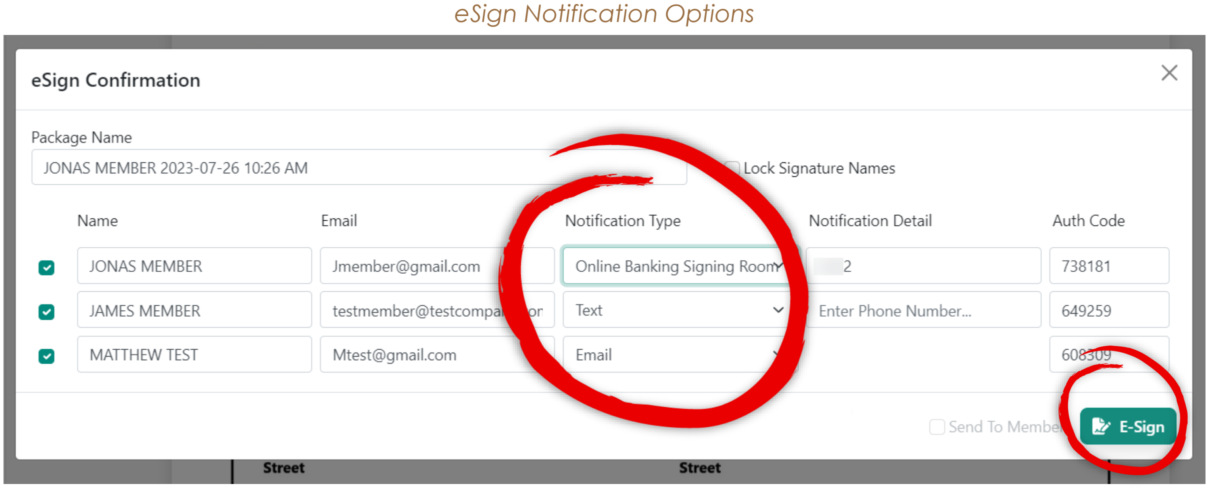
- *Lock Signature Names* forces the user to sign the name in the field stated by the credit union.
- *Send to Member* sends a copy of the form to **It's Me 247**. (NOTE: In this example, the field is greyed out, meaning it cannot be selected. If this is the case, when you click this box, you will be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

*Sending a Form for eSign*




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

*eSign Notification Options*




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

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

# Building a Template

## Importing a PDF and Adding Fields

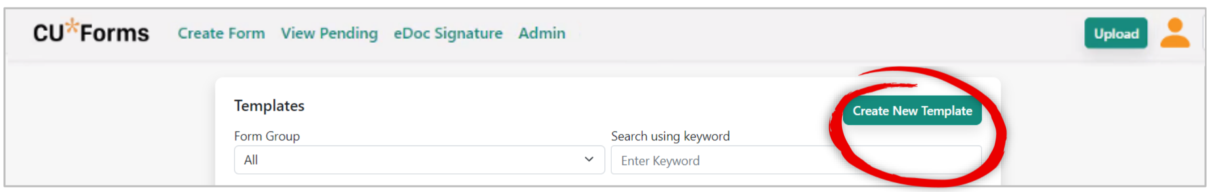
While **CU*Forms** allows you to enter fields on the fly, the easiest way to a professional-looking form is to create the base in a PDF with pre-defined fields. This can be done with a more advanced version of Adobe Acrobat or other PDF generator software.

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

## Accessing the Template Area

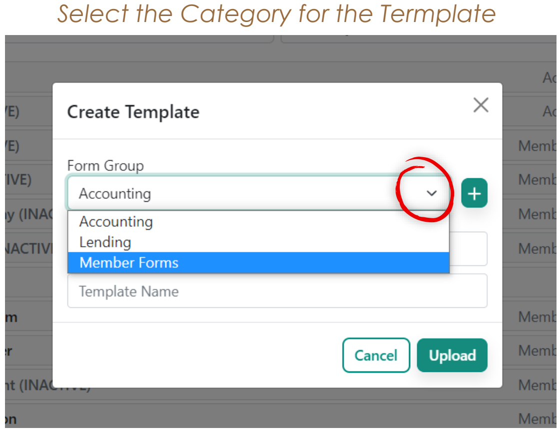
Select From *Admin*, select Edit *Templates*. Then select *Create New Template*.

*Build a New Template*




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

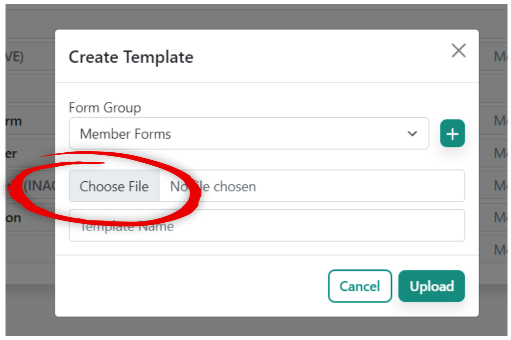
*Select the Category for the Termplate*



# Importing the PDF with Defined Fields

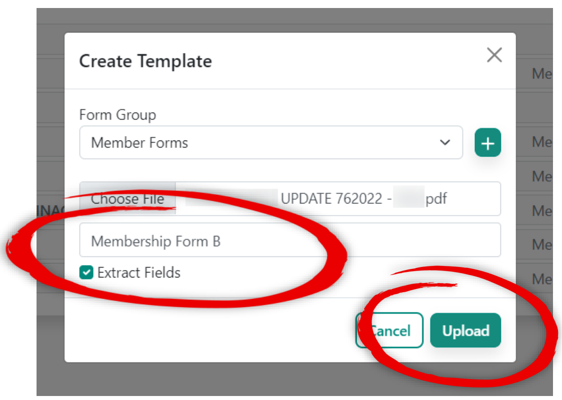
While it is not required, importing a form with defined fields is recommended. At this point, choose the PDF by clicking *Choose File*, and browse to find it.

*Search Your Computer to Upload the PDF*




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

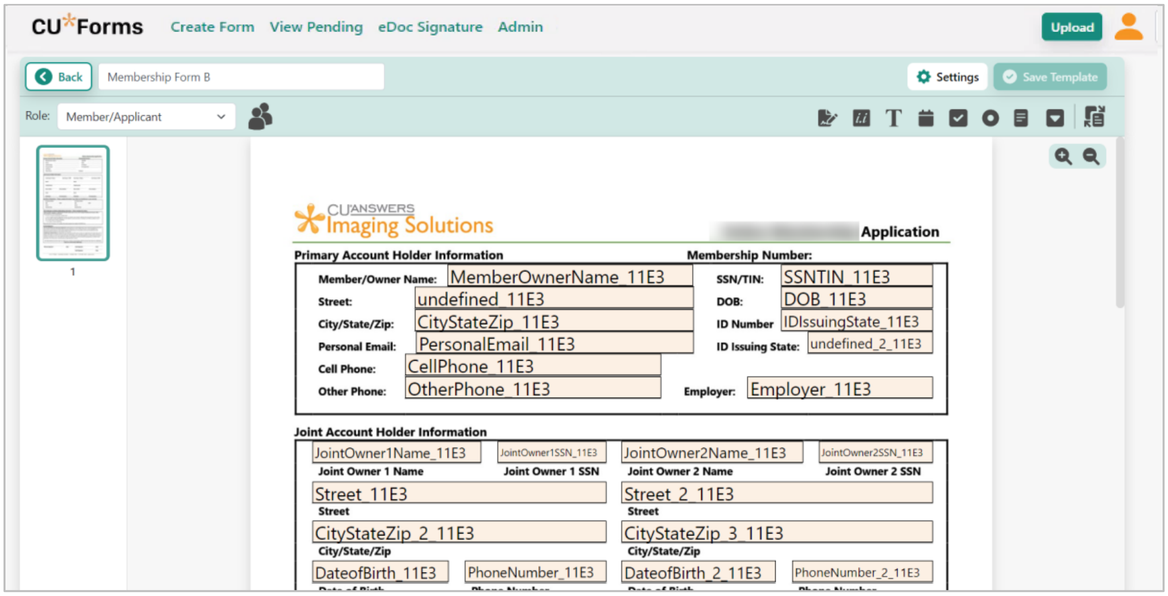
*Rename Your Template*




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

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

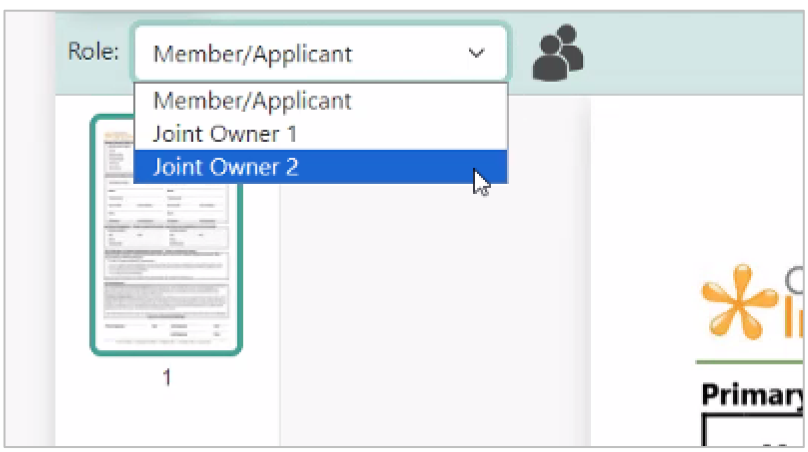
*Template Uploads with Default Field Names*




## Member and Joint Owner

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

*Roles Assigned*



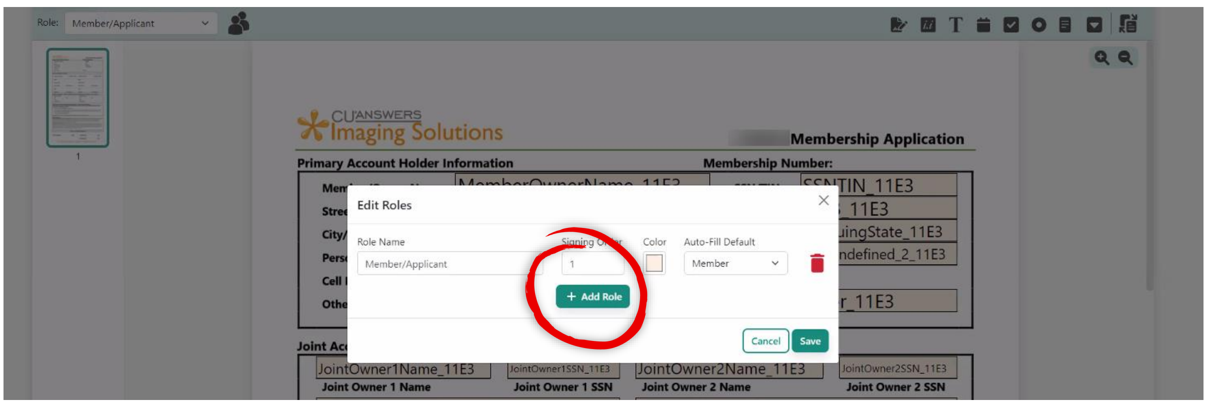
# Assigning Roles to the Template

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

*Adding Roles to Template*

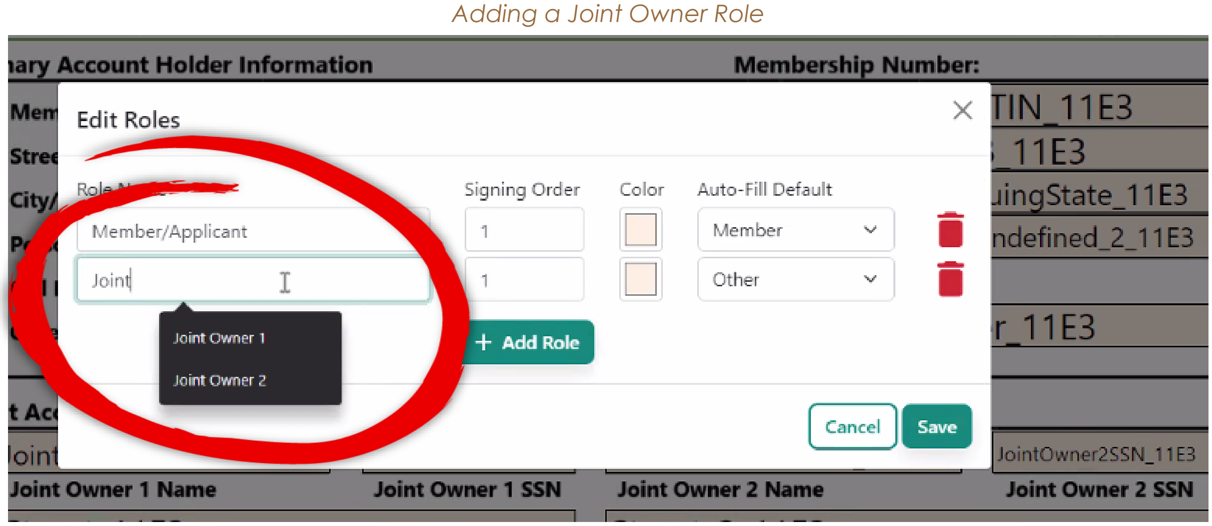

A window will appear allowing you to assign the roles. *Member Applicant* is listed by default.

*Member/Applicant is Default Role*



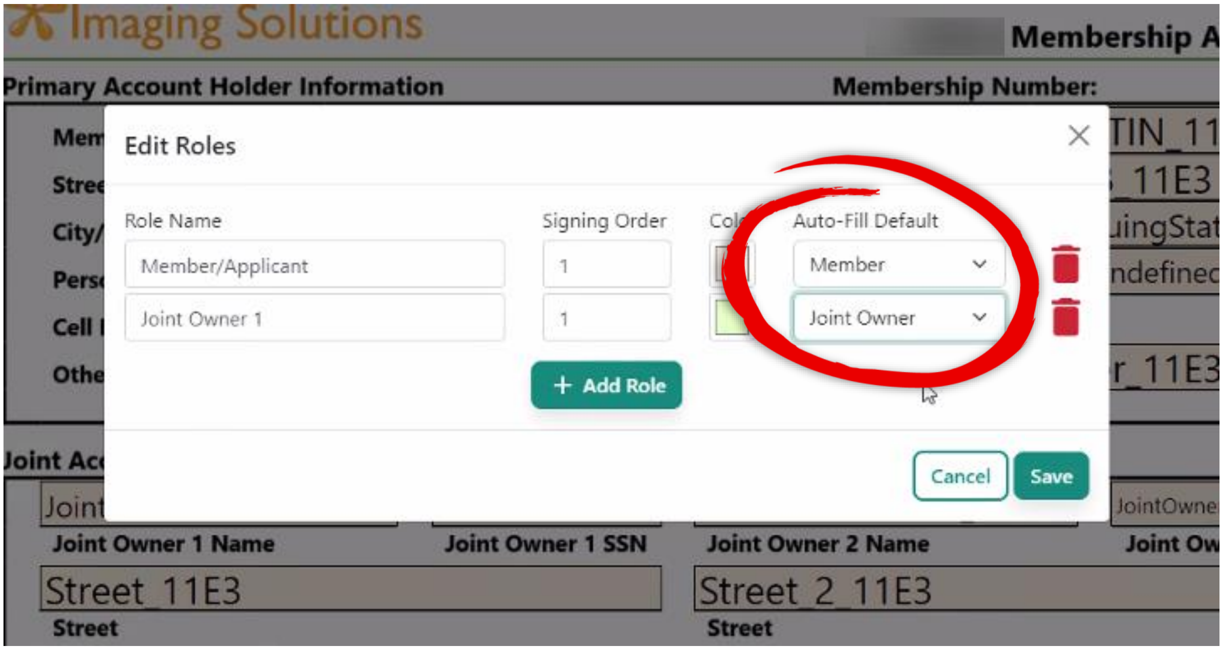

To add joint owners to this form, click *Add Role*.

*Adding a Joint Owner Role*




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

*Adding a Joint Owner Role*



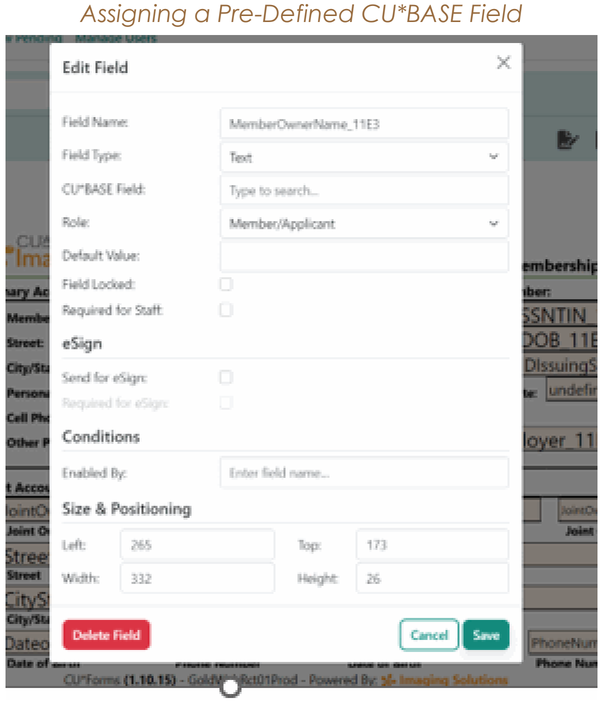

Set the *Auto-Fill Default* to *Joint Owner.*

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

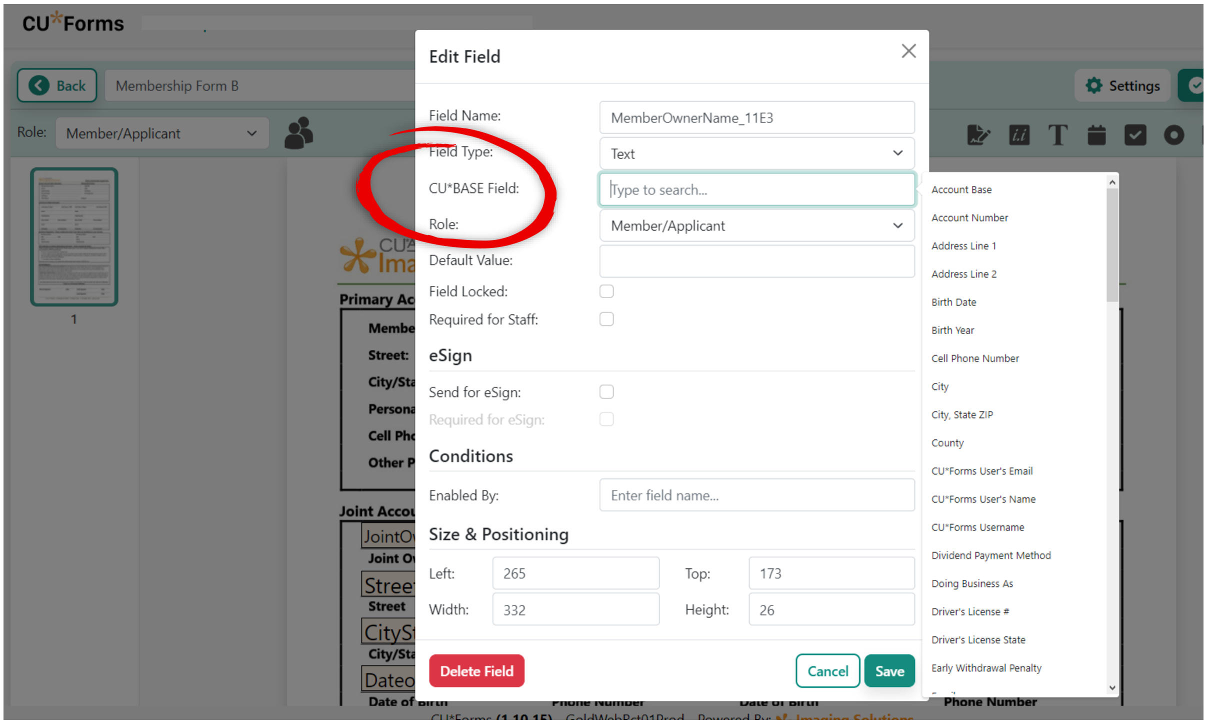
# Assigning Pre-Defined CU*BASE Field

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

*Assigning a Pre-Defined CU*BASE Field*

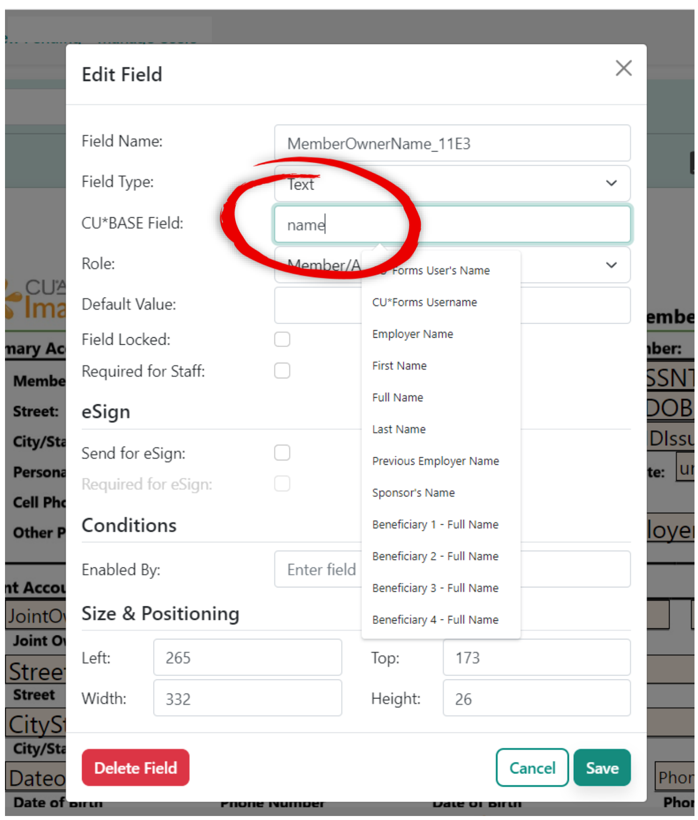


*Click CU*BASE Field to Reveal the Listing*



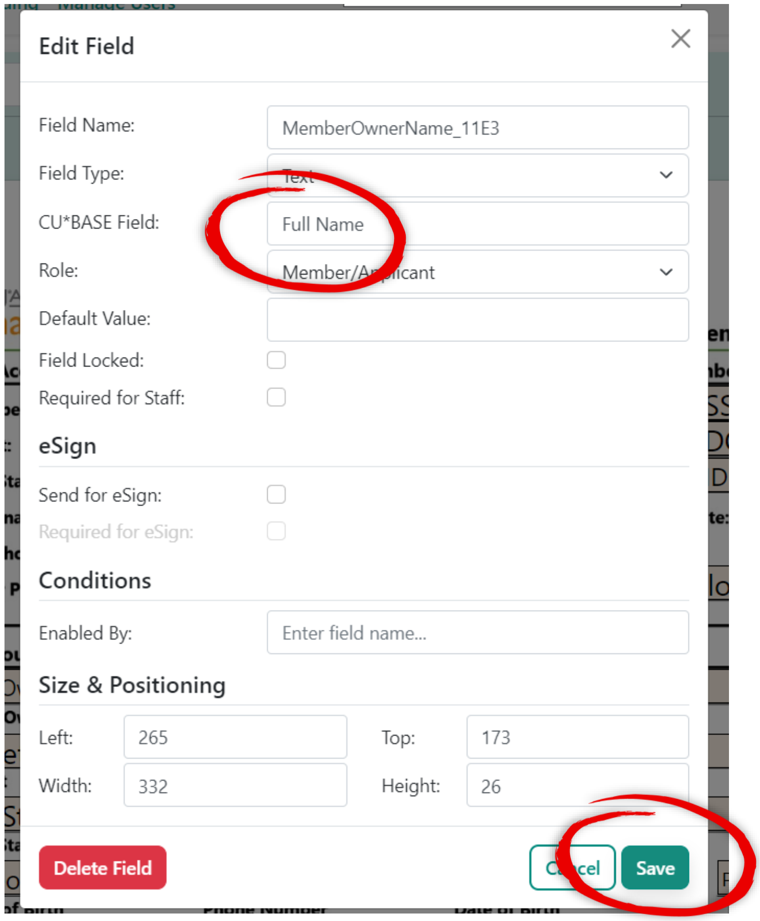

Then shorten the list of available fields to select by typing (or scroll through the list).

*Shorten the Field List*



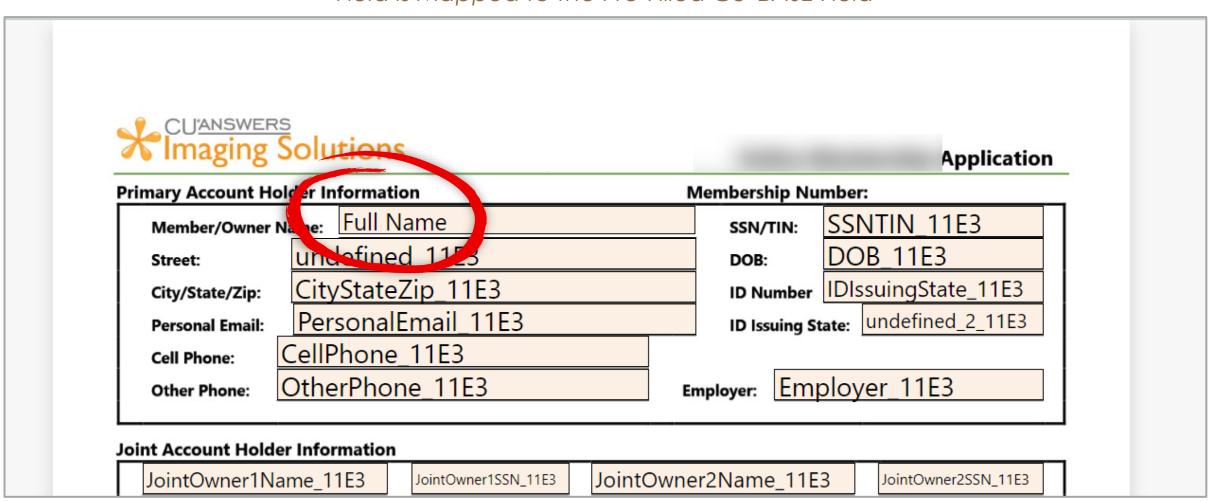

Select the field on the list.

*Selecting Field*




Click *Save*, and the fieldname will be updated.

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



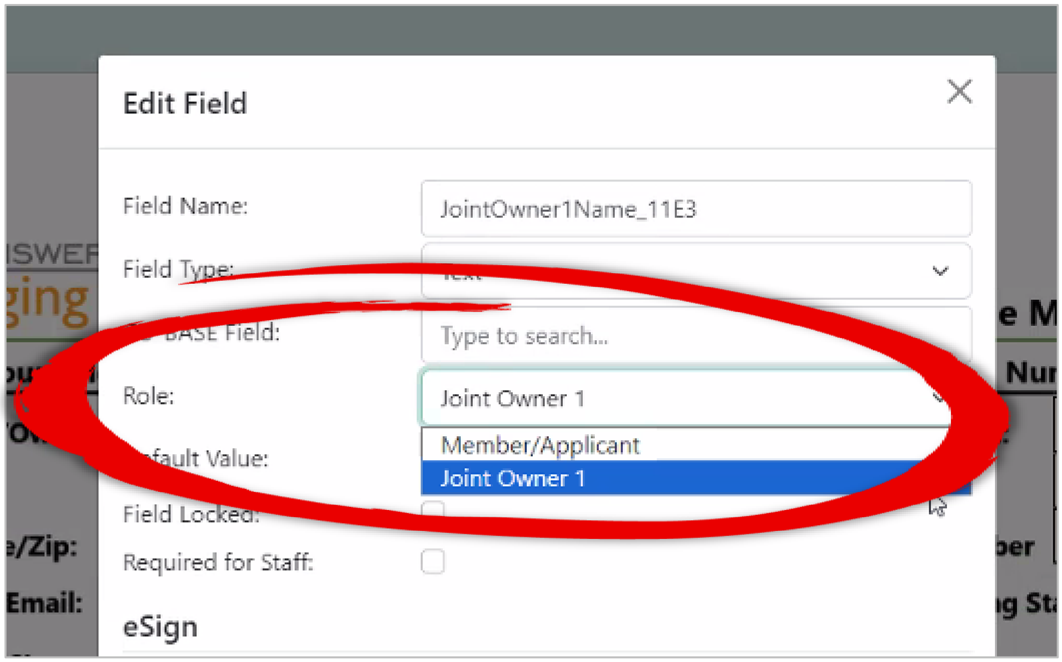

Continue this process until you have mapped all the needed fields.

## Adding Joint Owner Fields to the Template

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

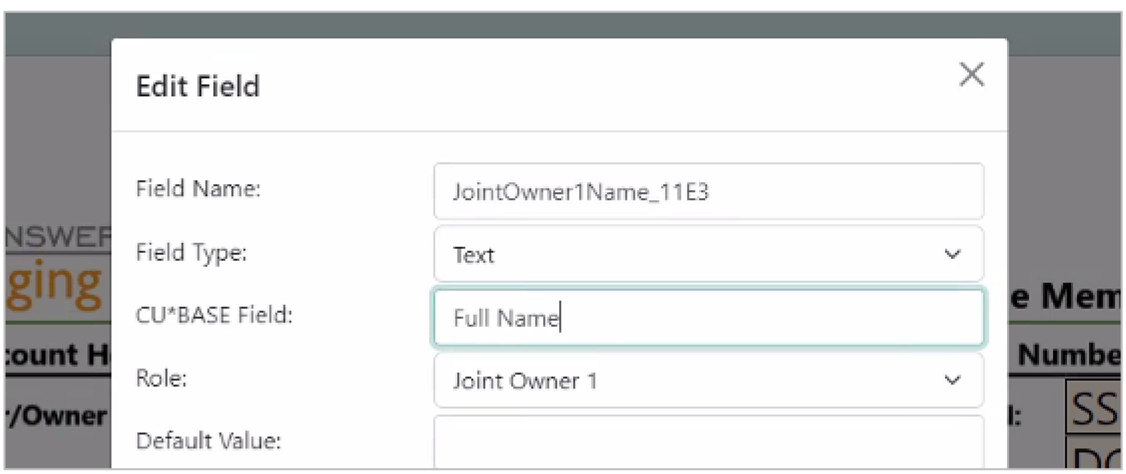
On the *Edit Field* screen, select the *Role* from the drop-down menu.

*Selecting a Role for a Field*



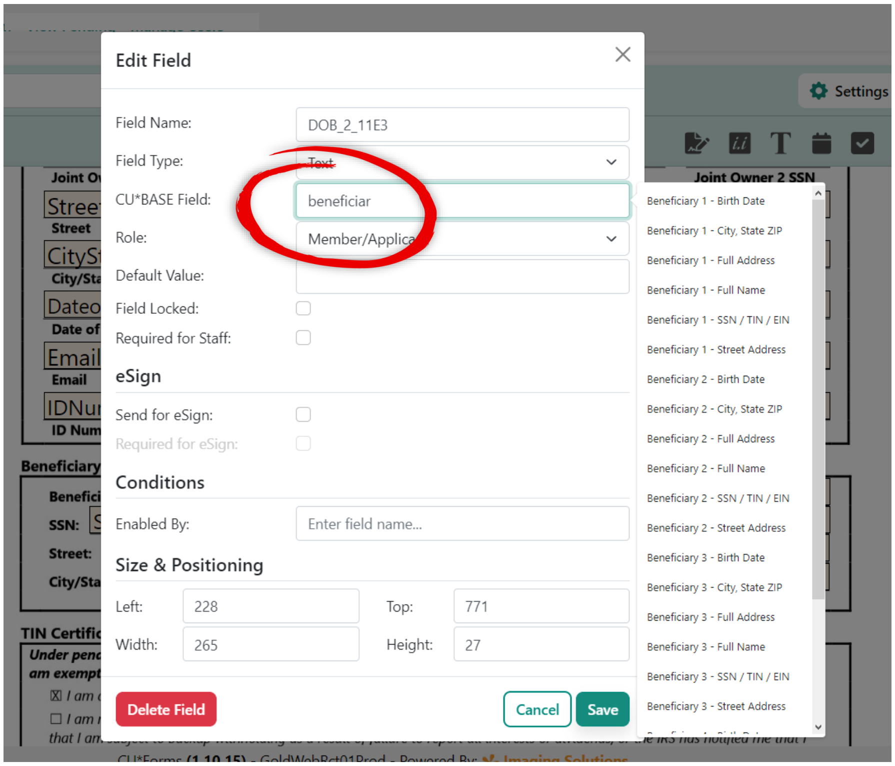

Then when you select a CU*BASE field, the joint owner data will pre-fill when the form is created, as shown below.

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



## Assigning Beneficiary Fields

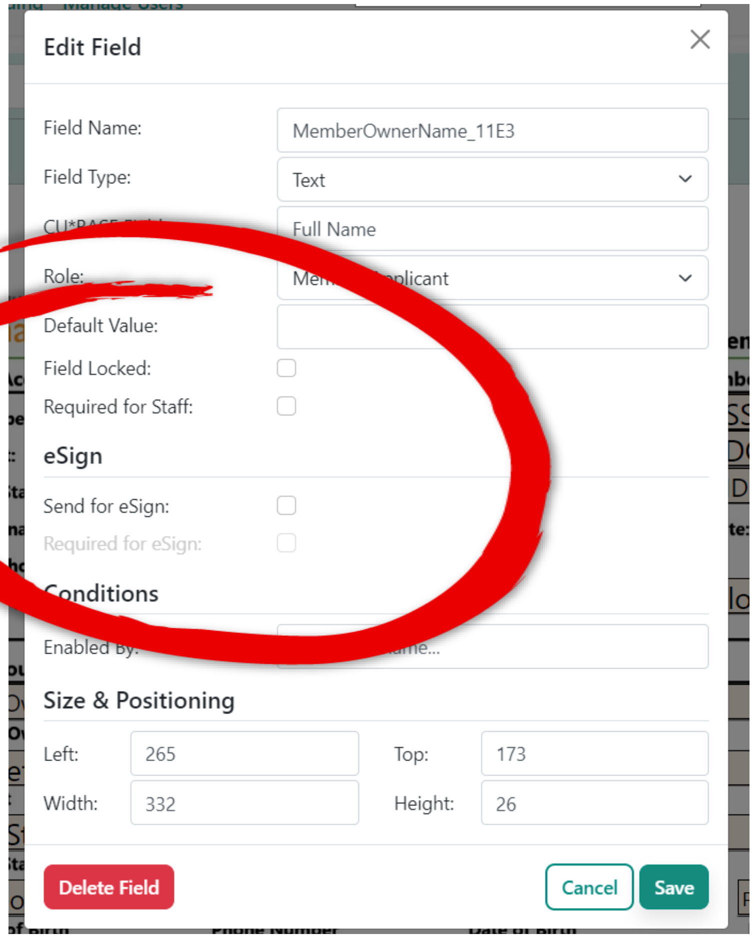
Beneficiary data is automatically populated in the form if a beneficiary field is mapped, and a beneficiary exists on the membership. Type keyword "beneficiary" in *CU*BASE Field* to present these fields for selection.



## Other Field Options

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

*Other Field Attributes*




The following field-level settings can be granted.

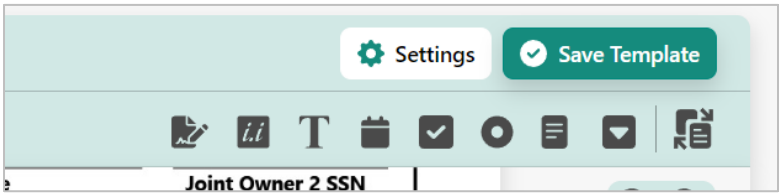
### Field Settings

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

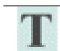
# Adding a Manual Field

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

*Manual Field Options*




## Manual Field Options

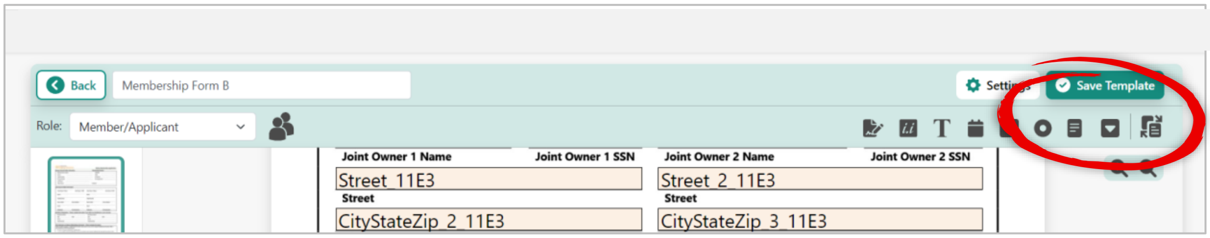
| *Field* | *Description* |
|---|---|
|  | Add signature field. |
|  | Add initials field. |
|  | Add text box. |
|  | Add date field. |
|  | Add checkbox. |
|  | Add radio button. |
|  | Add memo field (for longer text, such as a paragraph). |
|  | Add a drop-down menu. (An area will appear to allow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

# Saving the Template

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

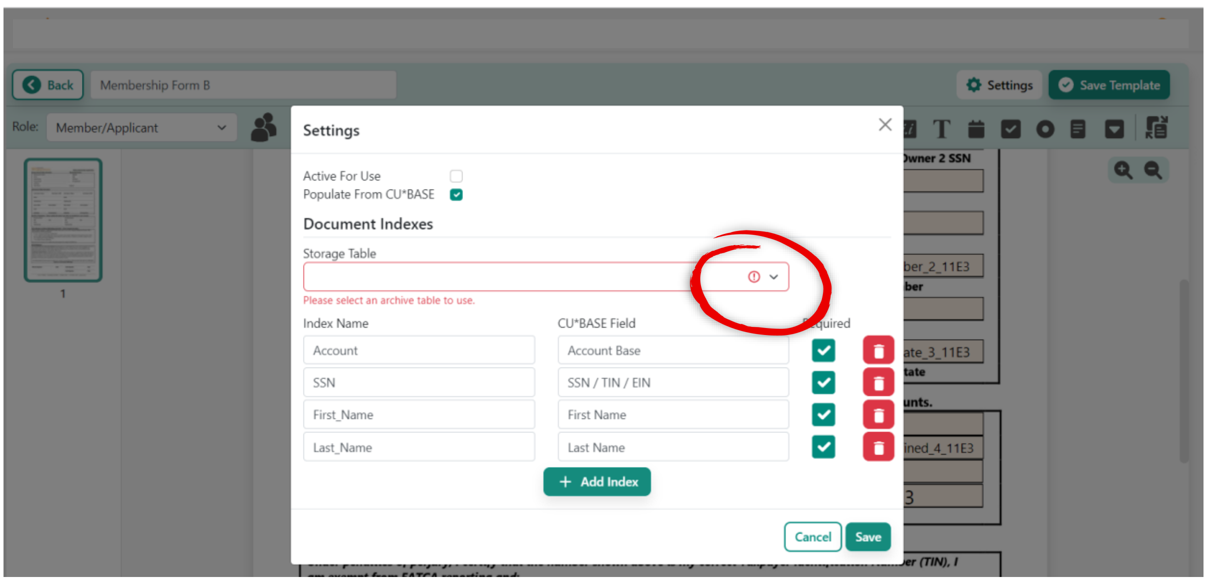
When you have completed mapping and configuring the fields on the template, click *Save Template*.

*Saving Form*



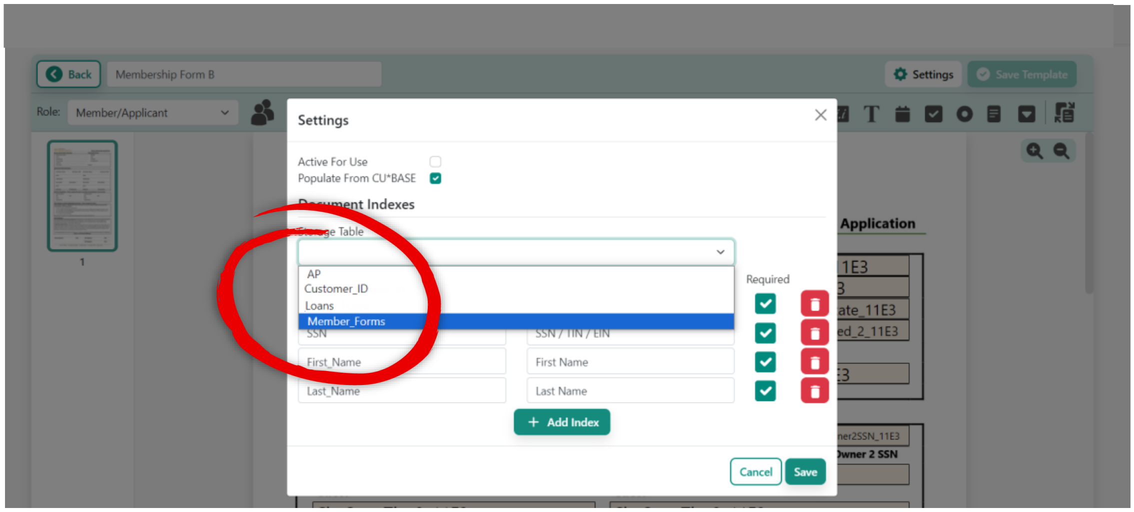

You will then be asked what Storage Table to which you want to save your template.

*Settings for Saving*



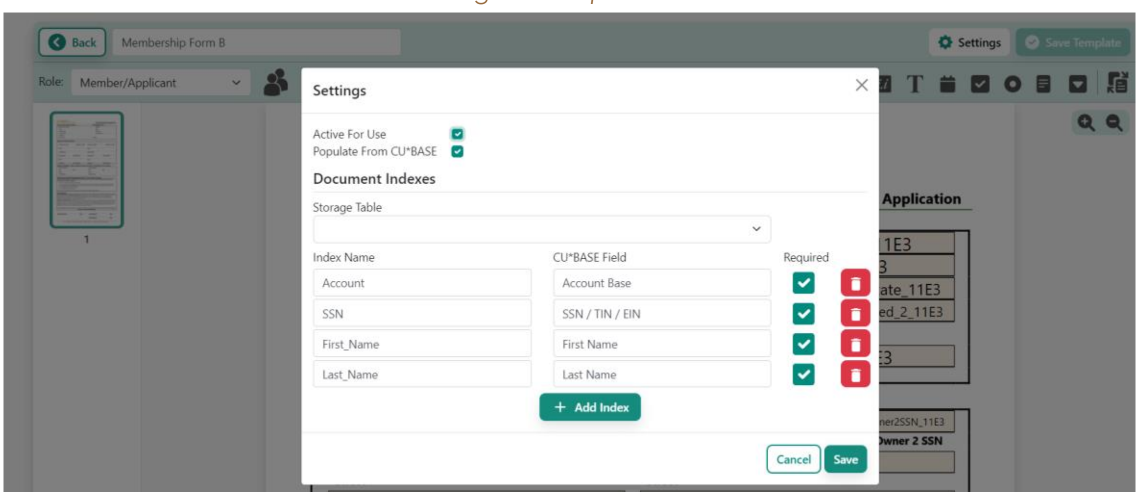

Click the down arrow and select the appropriate category.

*Selecting the Storage Table*




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

*Making the Template Active*




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


When you select *Create Forms and are prompted to create new forms,* the form will no longer be marked as inactive.

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

# Managing Users

## All Permissions Assigned Versus Default Permissions

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

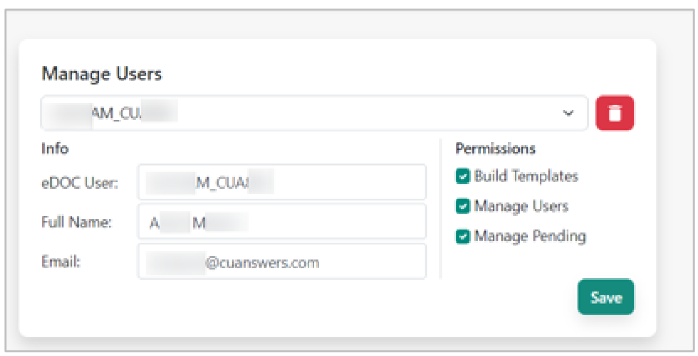
*User with All Permissions Assigned*


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

## Adjusting Permissions for Admin User

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

*Manage Users Selected*




The following permissions can be granted.

### Permissions

| *Field* | *Description* |
|---|---|
| Build Templates | Users can build new templates and mark templates as active. They can also deactivate templates. |
| Manage Users | This user can define your permissions. |
| Manage Pending | This permission allows the user to create new pending areas and delete current ones. |

# The Pending Area

## Temporarily Holding Forms

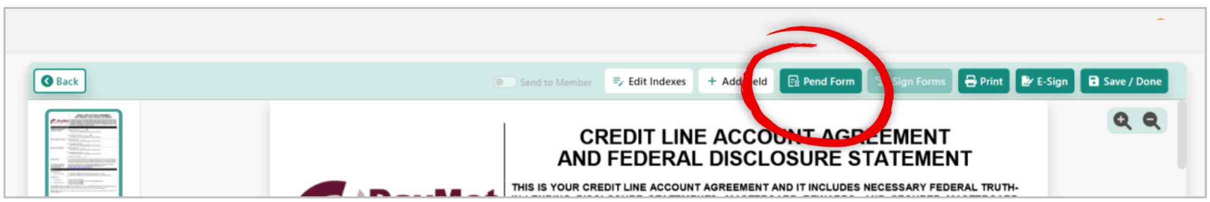
You can temporarily save an incomplete form to the pending area, for example, if you are waiting for a member to sign the form in branch,

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

## Adding a Form to the Pending Area

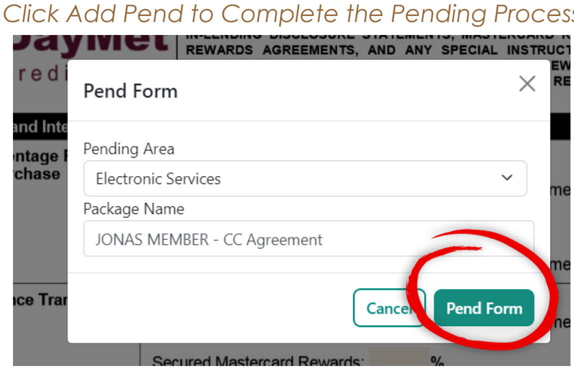
To add a form to the Pending area, click *Pend Form*.

*Saving a Form tothe Pending Area*



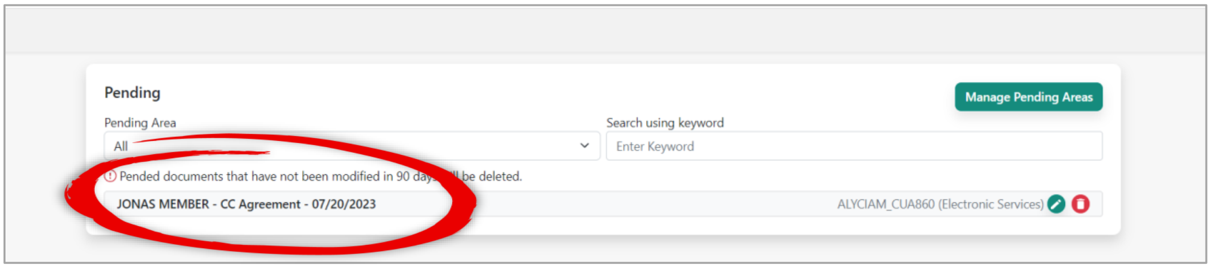

Select the sub folder under which it will be saved. Click *Pend Form* again.

*Click Add Pend to Complete the Pending Process*



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

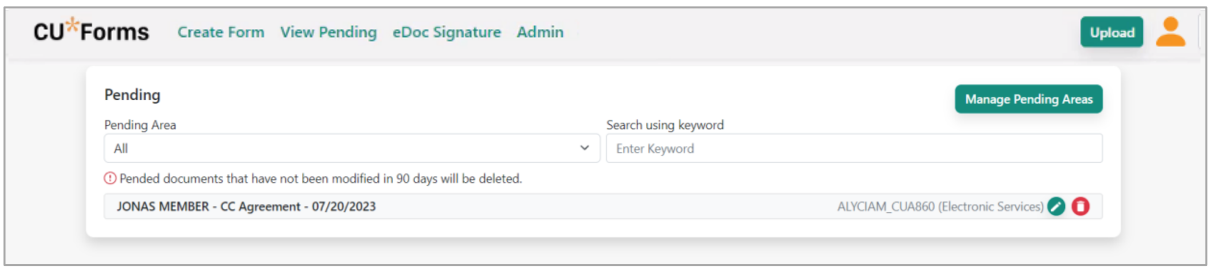
*Pending Form Saved in Pending Area*




# Retrieving Pending Forms

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

*Retrieving a Form Saved in Pending Area*

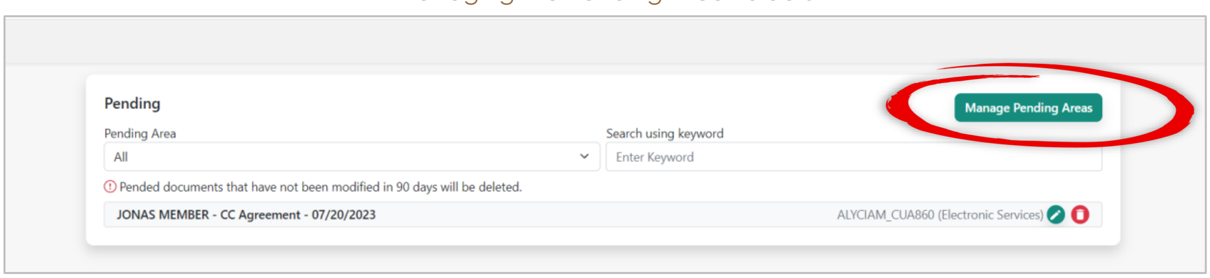



Simply select the form from the list. It will open in **CU*Forms**, ready for the form to be completed.

# Adding Additional Pending Folders and Deleting Folders

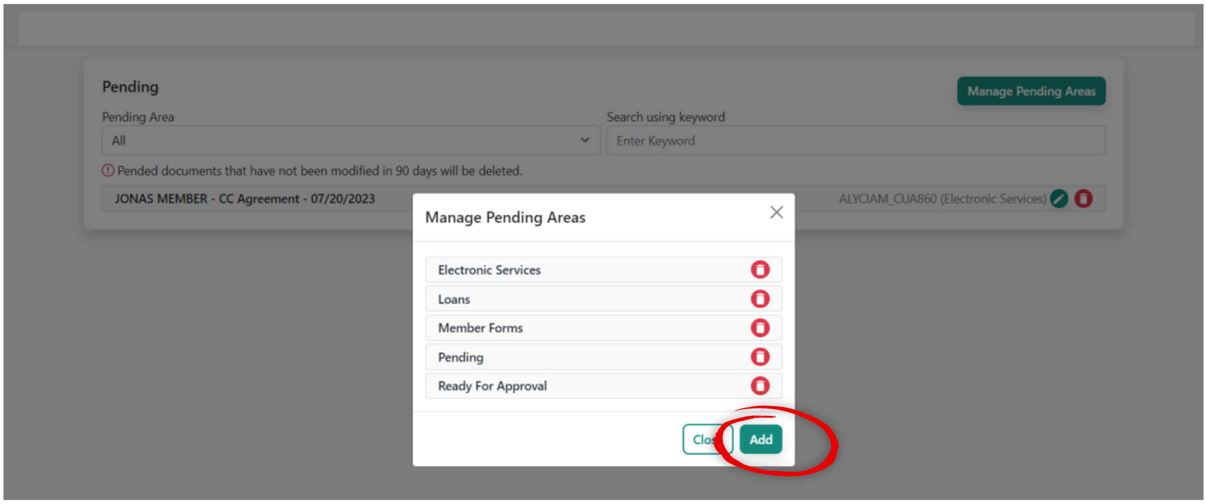
To manage the folders where you save pending items, access the pending area.

*Managing the Pending Area Folders*



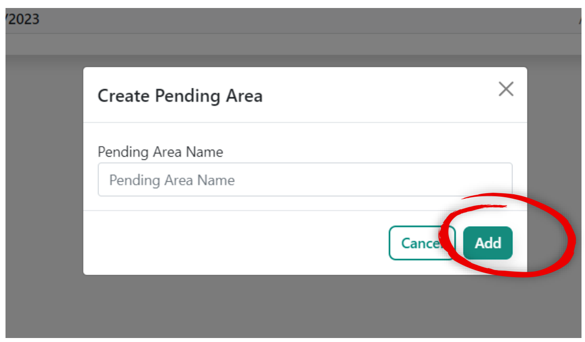

From the Pending area, click *Manage Pending Area*.

*Vieiwng the Pendign Area Sub-folder Structure*




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

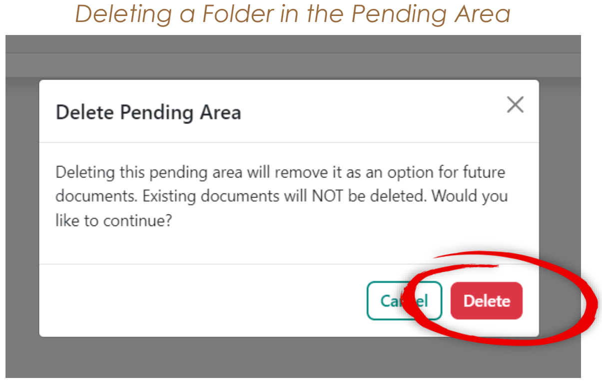
*Adding a New Sub Folder in the Pending Area*




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

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

*Deleting a Folder in the Pending Area*



# Upload a General Form for Archive

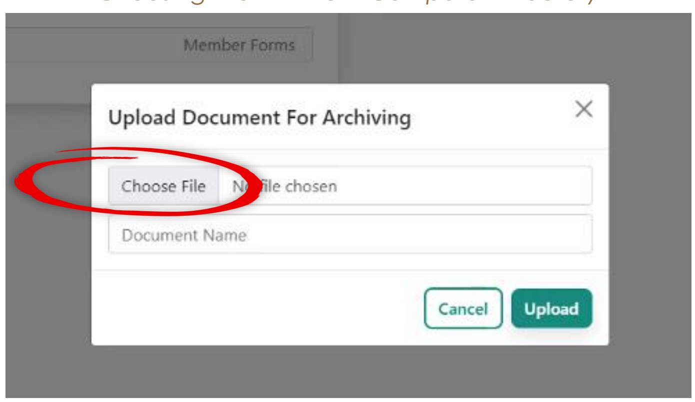
## Archive a General Form to a Membership

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

Selecting to Upload a PDF to Create a General Form

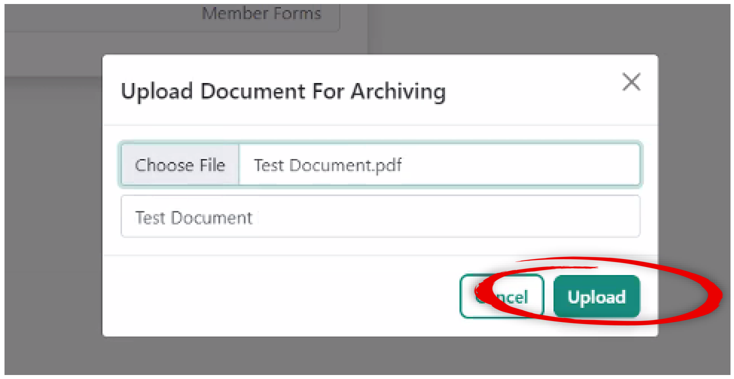

A window will appear allowing you to update the PDF form.

Choosing the PDF from Computer Directory



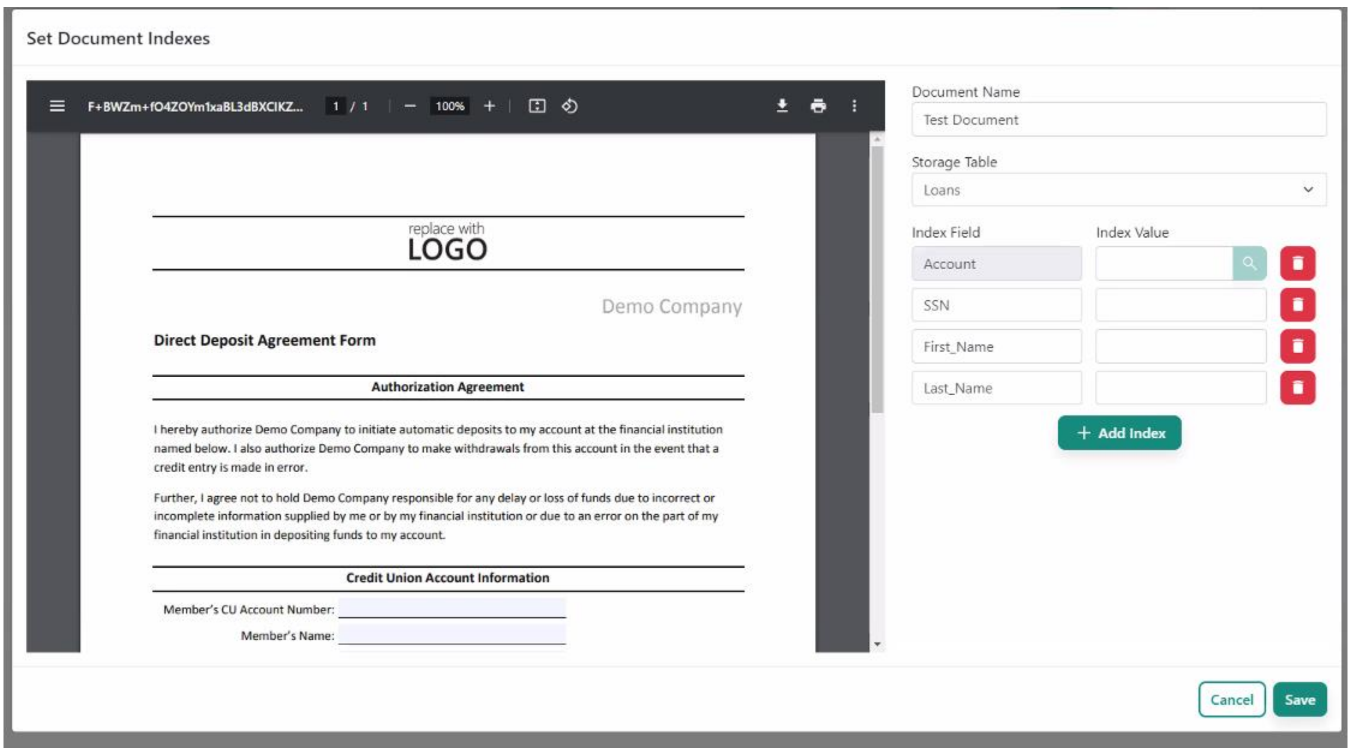

Click *Choose File*. Navigate to the file on your computer and select it. The filename will then appear in the CU*Forms window.

*Final Upload of the PDF Form*

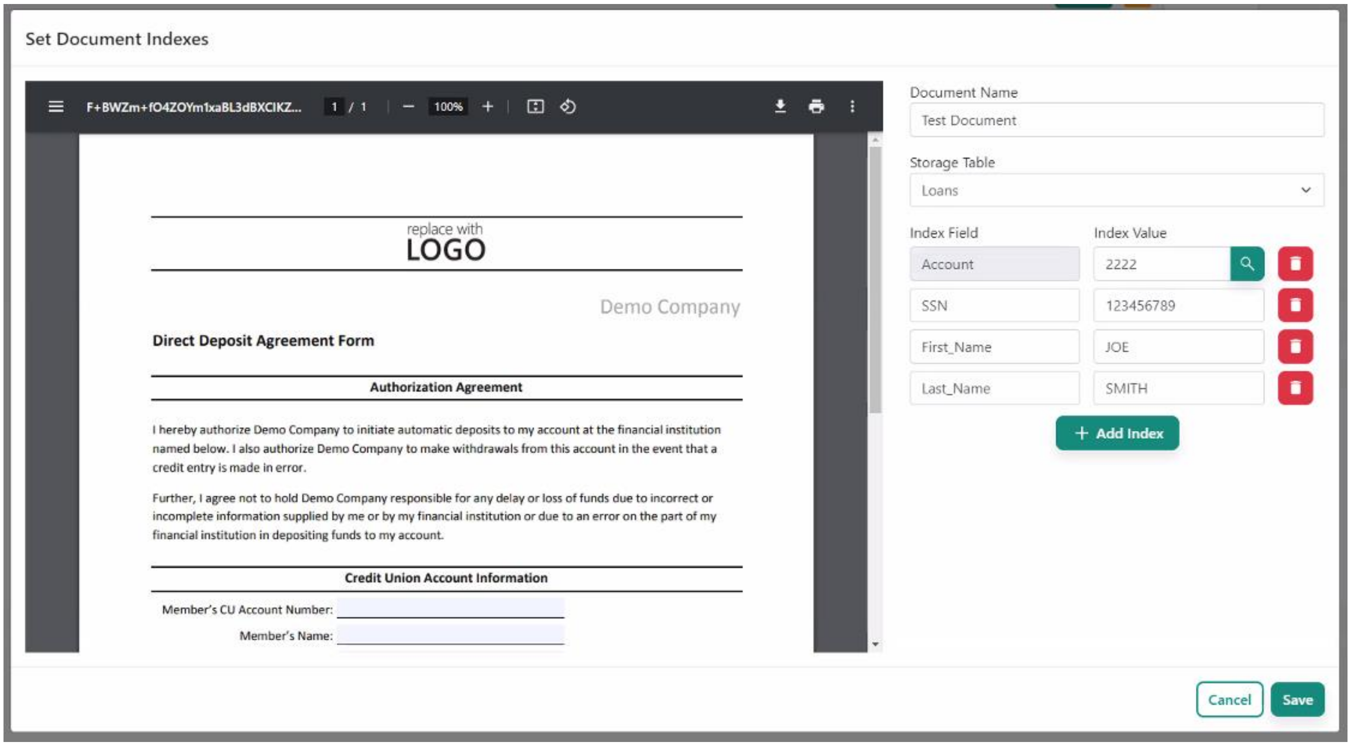



Click *Upload* again. The fields will appear allowing you set the document indexes.

*Form is Ready to Index*



*Entering the Index Values for Archive*




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

# Frequently Asked Questions

## Questions Asked about **CU*Forms**

The following are questions commonly asked about **CU*Forms**.

### How do I activate **CU*Forms**?

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

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

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

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

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

### How many forms can you create in **CU*Forms**?

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

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

A template allows you to map fields to pull pre-defined CU*BASE data into the form when it is created. The process for creating a template is covered on page 13.

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

Over 150 data points from CU*BASE can be populated into a CU*Form.

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

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

### Can all users see all of the forms?

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

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

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

## How do I populate the data of a beneficiary?

There are special fields designed to assist with the population of beneficiary information. See page 21.

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

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

## What is the Pending area used for?

You may save an incomplete form in the pending area.

## What are the permissions assigned to users?

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

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

## Where are the completed and saved forms archived?

Archived forms are stored in idocVAULT.

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

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

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

Yes, you can add check boxes, text fields, signature fields, and more to the template. See page 23.

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

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