

Commitment to CBX Training

Our standard courses, both online and trainer-facilitated, are designed to train staff to meet your members' needs. The Additional Tools, or specialty courses target areas unique to your credit union. Based on your credit union's products and services, some of these courses may not be trained prior to conversion.

The training provided through these classes will prepare your teams to become productive users of their new CBX software. Our objective is to get each member of staff to commit to this level of training that's required to achieve success. We understand that work schedules may require adjustment as you plan for this new responsibility.

The following form will assist in tracking progress of all members of your teams. Each employee should complete the form, then sign and date it, signifying that training has been completed.

You may find it beneficial to have the form submitted to you more frequently, so employee progress can be reviewed with your Coordinator and our Education Coordinator.

Employee Name _____

Required?	ONLINE COURSES	1 st Date Passed	2 nd Date Passed
	Preparing for Your Conversion to CBX		
	Leading Change: Conversion Preparation for CU Mgmt		
Y	Welcome to CBX		
Y	Navigating within CBX		
Y	Rate Inquiry, Loan Quoter, Time Out Window		
Y	Member Inquiry		
Y	Phone Operator		
	Opening Memberships & Accounts		
	Teller Processing 1		
	Teller Processing 2		
	Xpress Teller		
Y	e-Receipts and Photo ID Capture		
	Lending Basics		
	Lending 2: Creating and Disbursing Loans for Members and Non-Members		
	Collections Basics		
	Collections Advanced Daily Work		
	CBX General Ledger		
	Daily Share Draft Processing		
	Daily ACH Processing		
	Daily Payroll Processing		
	Report Builder: Canned Query		
	Report Builder: Custom Query		

Required?	ADDITIONAL TOOLS	Date Completed
Pre-conversion Training		
	It's Me 247	
	Online Bill Pay	
	Online Credit Cards	
	Indirect Lending / Dealer Track	
	Risk-Based Pricing / Decision Model	
	Prime Alliance Training	
	Participation Lending	
	Escrow Processing & 360 Mortgages	
	Marketing: Tracker Training	
	Audit Link Session 1	
Post-conversion Training		
	Audit Link Session 2	
	Management Reports & Leadership Dashboards	
	My Favorite Reports Series & Report Menus	
	Intro to Tiered Services	
	Collections Training	
	Education & Learning Opportunities	

Employee Name _____

Employee Signature _____

CEO Signature _____

_____ Conversion Coordinator Initials