



# Member Service

This workbook completed by: \_\_\_\_\_

Date: \_\_\_\_\_

## [EXERCISES FOR SUCCESS]

Practice exercises for use with the BEDROCK Credit Union

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# What is *Exercises for Success*?

Exercises for Success is a workbook series designed to provide practice exercises for credit union employees using CU\*BASE BEDROCK Credit Union. Each workbook is broken down into four sections.

First is an introduction to online resources that will assist learners in successfully completing the exercises in the workbook.

Next, the workbook includes helpful instructions which guide learners in selecting appropriate accounts for use while practicing the activities covered in the booklet.

The exercises are the main section of the workbook. Each exercise focuses on a specific activity in CU\*BASE. Each exercise has both scenarios to follow to master the material, as well as a following “Test What You’ve Just Learned” section including questions for review.

*Exercises for Success* culminates with a final *Check Your Knowledge* section. Learners can use this area of the workbook to take stock of what they have learned and to note which areas need further review.

We wish you success with these exercises!

## **IMPORTANT NOTE ON THE USE OF PERSONAL INFORMATION IN BEDROCK CREDIT UNION**

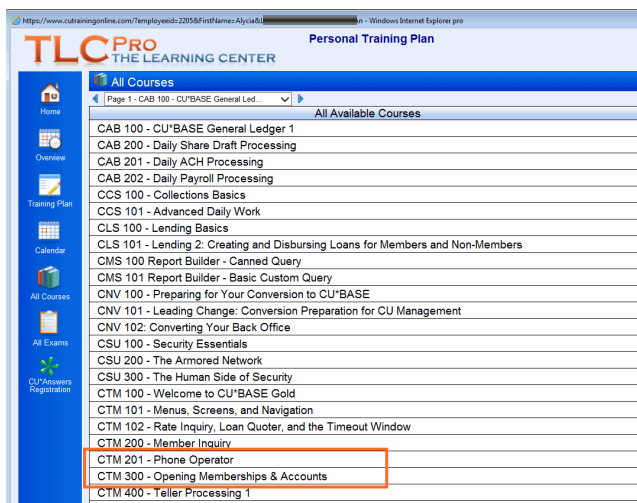
BEDROCK Credit Union allows many credit unions’ employees to practice using CU\*BASE. For security reasons, we recommend you **do not enter any personal information into this database**, including, but not restricted to, your own social security number, email address, physical address, or your first or last name. Any personal information entered into the BEDROCK database can be viewed by anyone using the practice credit union.

# Introduction: Online Resources

Want help with the following exercises? Check out your online resources for assistance! Included in this section is an introduction to three available online resources: the online courses and two online help systems. All three resources can be used to successfully complete the activities in this workbook.

## Online Courses

### REQUIRED ONLINE COURSES FOR THE MEMBER SERVICE EXERCISES FOR SUCCESS:



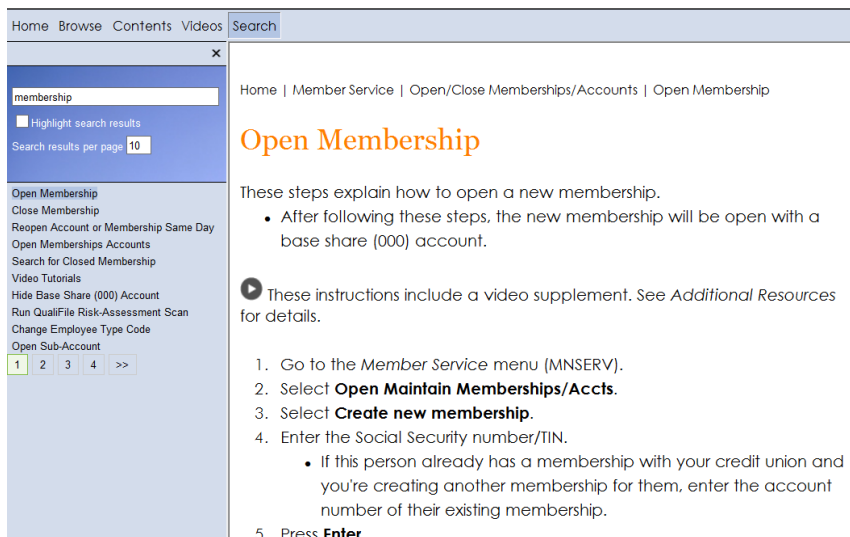
Two courses in the CU\*BASE Teller/Member Service Category are required for the *Member Services Exercises for Success – Level 1*. Be sure to complete the highlighted courses before continuing to work with the exercises in this workbook.

The required online courses include information on different Member Service functions in CU\*BASE. Included in the courses are “Show Me” videos that demonstrate how to do the activity, along with “Let Me’s,” that allow you to try the activities on your own.

# Show Me the Steps Online Help

Take a moment to check out this online resource before trying the exercises. Directions for accessing the help are below.

Check out Show Me the Steps online help. This help system includes step-by-step directions on many member service tasks and will help you step-by-step with the activities in many of these exercises. Use the Search to find the directions you are looking for.



The screenshot shows a search interface with a search bar containing the word "membership". Below the search bar, there are search results for "Open Membership". The results include a list of links on the left and a detailed view of the "Open Membership" page on the right. The detailed view includes a breadcrumb trail, a title "Open Membership", a description of the steps, and a list of five numbered steps.

Home Browse Contents Videos Search

membership

Highlight search results

Search results per page 10

Open Membership  
Close Membership  
Reopen Account or Membership Same Day  
Open Memberships Accounts  
Search for Closed Membership  
Video Tutorials  
Hide Base Share (000) Account  
Run QualiFile Risk-Assessment Scan  
Change Employee Type Code  
Open Sub-Account

1 2 3 4 >>

Home | Member Service | Open/Close Memberships/Accounts | Open Membership

## Open Membership


These steps explain how to open a new membership.

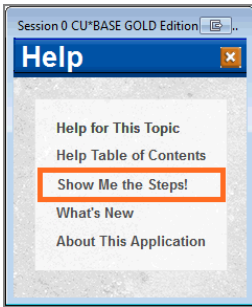
- After following these steps, the new membership will be open with a base share (000) account.

These instructions include a video supplement. See *Additional Resources* for details.

- Go to the *Member Service* menu (MNSERV).
- Select **Open Maintain Memberships/Accts**.
- Select **Create new membership**.
- Enter the Social Security number/TIN.
  - If this person already has a membership with your credit union and you're creating another membership for them, enter the account number of their existing membership.
- Press **Enter**.

## HOW TO FIND THE SHOW ME THE STEPS! ONLINE HELP:

1. You can access this system by clicking  on the bottom of any menu screen in CU\*BASE.
2. Then click the **Show Me the Steps!** link.



For a more direct route to Show Me the Steps online help, visit:  
<http://help.cubase.org/steps/steps.htm#Welcome.htm>

## CU\*BASE Online Help

Take a moment to check out this online resource before trying the exercises. Directions for accessing the help are below.


CU\*BASE online help includes more detailed information about the screens you will use in CU\*BASE. Don't know something about CU\*BASE? Check this help out for the answer!

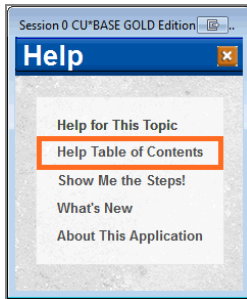
Use the Table of Contents, Index, and Search features to find the information you need. This help system also includes links to videos, examples of reports and pictures of each screen.

To view a close-up of each CU\*BASE screen, click the [Click here to magnify](#) under the small graphic at the top of the topic. (View image above.) A larger picture of the screen will appear.

### HOW TO FIND CU\*BASE ONLINE HELP:

1. Click  in the bottom corner of each screen in CU\*BASE.

2. You can also access this system by clicking  on the bottom of the screen and the **Help Table of Contents** link.



# Getting Started

For a more direct link to the help use <http://help.cubase.org/cubase/cubase.htm>.

You will use the BEDROCK Credit Union to practice your exercises. (Please see your manager or education coordinator for your credentials to sign on to BEDROCK.)

## What Do I Need for this Course?

In order to complete this course, you will first need to create two practice memberships and fund their sub accounts. You will need to:

- Create two new memberships in the BEDROCK credit union.
- Open a checking account for the first membership with the second member as a Joint Owner on that account.
- Activate your teller drawer and deposit \$1,000 cash into each sub account, including the base (000) share accounts.

## Use “Step by Step Help” Help to Get Started!

Directions on creating memberships, opening checking accounts, activating the teller drawer, depositing funds – all this is available in the Show Me the Steps online help.

In a web browser navigate to Show Me the Steps online help using the directions on page 6.

Use the Index and the following keywords to find directions on:

- Open Membership
- Open Additional Savings or Checking Account
- Add Joint Owner to an Account
- Activate Teller Drawer
- Make a Cash Deposit
- **IMPORTANT:** For security reasons, do not enter your own email address or any other personal information in the BEDROCK database.

## My Accounts

List your practice membership accounts below:

<b>Account #1:</b>	
<b>Member Name:</b>	
<b>Account #2:</b>	
<b>Member Name:</b>	





# Member Service Exercises Now it's time

for the Member Service Exercises! Following are six exercises with practice questions. After the exercises, you will “Flex Your Muscles” and review what you have learned.

## 1

### Activity 1: Viewing and Making Changes - Personal Information

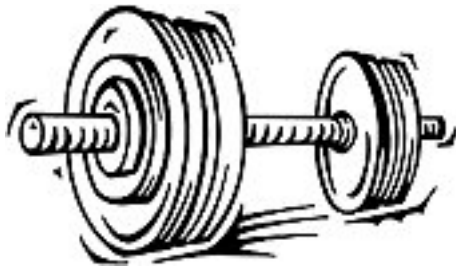
#### THE GOAL: CHANGING THE MEMBER’S PERSONAL INFORMATION

Let’s use our first membership to make some changes to the member’s personal information. Use Inquiry (F1) to make these changes.

- Remember: For security reasons, do not enter your own email address or any other personal information in the BEDROCK database.

Activity:	Notes:
1. The member has moved to a new house, but is still in the same zip code. Enter the new street address of <i>123 Main Street</i> in the system. What change do you see when you return to the Inquiry screen?	
2. The member’s email address has changed. Enter the following email address for the member (or enter one if the member did not previously have one): <i>testmember@testcompany.com</i> What change do you see when you return to the Inquiry screen?	

Activity:	Notes:
<p>3. The member’s license number has changed. Update the number (or enter one if one does not exist). What change do you see when you return to the Inquiry screen?</p>	
<p>4. The member wants the credit union to record a Code Word that employees will ask before accessing the account. Enter a Code Word for this member (or change it if one exists). What change do you see when you return to the Inquiry screen?</p>	
<p>5. The member plans live at a different address for part of the year (January 1<sup>st</sup> to March 31<sup>st</sup>). Enter this “alternate address” for the member in the system. Make this a permanent change. When you return to the Inquiry screen, what change do you see?</p>	
<p>6. How can you tell that the second member is a beneficiary on the first member’s checking account accounts? If you didn’t know this second member’s name, how would you find it?</p> <ul style="list-style-type: none"> <li>• Hint: Look for a Y or a blue dot in the J/O column in the Inquiry view. Also click the Secondary Names button.</li> </ul>	



## Activity 1: Flex Your Muscles!

You have completed the exercises. Now test yourself (without notes) on what you just learned!

Question:	Answer:
1. How do you access the screen to change a member's personal information? Which option or button do you use?	
2. A member has recently married and changed her last name. How do you record this change in the system?	
3. The member does not have an email address but is glad to share it when asked. How can you enter the email address in the system?	
4. How can you tell that a member lives in Florida for part of the year? What indicator on the screen do you look for?	
5. Where do you find the license number of the member? How about the member's mother's maiden name?	
6. Where do you look to find the Code Word for the member?	

<b>Question:</b>	<b>Answer:</b>
7. A husband of the member comes into the credit union. How can you confirm that he is a joint owner of the membership?	

# 2

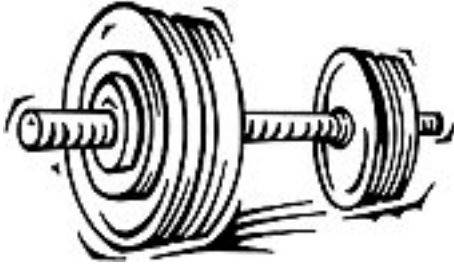
## Activity 2: Transferring Funds via Phone Operator

In these exercises you will transfer funds. Be sure to use Phone Operator when assisting the members.

### THE GOAL: TRANSFERRING FUNDS VIA PHONE OPERATOR

Activity:	Notes:
<p>1. Transfer \$10.00 from your one of your member's savings account the same member's checking account. Which option or button do you use?</p>	
<p>2. Your second member calls and wants you to transfer \$10 from her savings account to the first member's checking account. The member is not at the credit union so this member cannot present identification.</p> <p>During a transfer between memberships, after you select the second account and press Enter, the Verify Member (F1) button appears. Select it to view the Verify Member screen.</p> <p>Have you seen this screen anywhere else? What helpful information do you see that might help verify a member's identity? (Use the up arrow (F7) to exit this screen.</p>	

<b>Activity:</b>	<b>Notes:</b>
<p data-bbox="253 279 764 386">3. Later, the second member calls and wants to transfer \$20 from to your first member's savings account.</p> <p data-bbox="300 434 797 657">Assist this member with the transfer. While making the transfer, enter a secondary transaction description of "Money for college." (This will appear in online banking and on the member's statement.)</p> <p data-bbox="300 705 764 852">Can you figure out how to have this only appear on the Transfer From: member's statement? (Look at the screen carefully.)</p>	



## Activity 2: Flex Your Muscles!

You have completed the exercises. Now test yourself (without notes) on what you just learned!

Question:	Answer:
1. How do you make a transfer between sub accounts of the same membership using Phone Operator? Which option or button do you use?	
2. What is the same and what is different when you transfer funds between two memberships? Which option or button do you use?	
3. A member you do not know calls your credit union to make a transfer. How can you verify the identity of this member who is not present to show you her license?	
4. How do you add a secondary transaction description to remind the person making the transfer what the transfer is for?  How do you make sure that the person receiving the transfer does not also see this description on his statement?	



# 3

## Activity 3: Average Balance and Transaction History Report

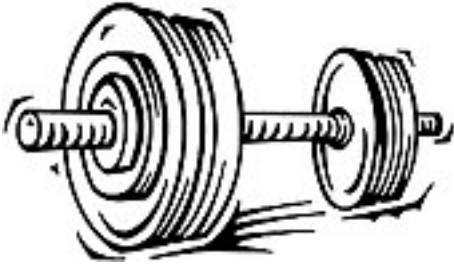
### THE GOAL: DETERMINING AN AVERAGE BALANCE AND PRINTING THE TRANSACTION HISTORY REPORT

For these exercises, you will determine the average sixty day balance of a sub account. You will also print both a Verification Deposit form and a Transaction History Report.

- For these exercises, act as though your member has had this account open for over 60 days.

Activity:	Notes:
1. Your first member wants to know the average balance (for the last sixty days) of his savings account. How do you assist this member?	
2. Your first member also wants to also know the average daily balance of his checking account for the last sixty days. How do you assist this member?	
3. The member wants you to print a Verification of Deposit form for this account. (Look closely at the screen.) (Note: Since you are in a practice environment, nothing will print.) How do you assist this member?	

<b>Activity:</b>	<b>Notes:</b>
<p>4. This same member additionally wants you to print a Transaction History Report listing the transactions of his checking account for the last two weeks. Note: Since you are in a practice environment, nothing will print.) How do you assist this member?</p>	
<p>5. Your second member wants to know the Average Balance for her checking account and for you to print a Verification of Deposit for the same account. The same member also wants a Transaction History Report of last month transactions for both the savings and checking sub accounts. (Note: Since you are in a practice environment, nothing will print.) How do you assist this member?</p>	



## Activity 3: Flex Your Muscles!

You have completed the exercises. Now test yourself (without notes) on what you just learned!

Question:	Answer:
1. How do you determine the Average Daily Balance of an account? Which option or button do you use?	
2. How do you print a Verification of Deposit form? Which option or button do you use?	
3. How do you print a Transaction History Report? Which option or button do you use?	
4. Can you print a Transaction History Report for more than one sub account without re-entering the screen used to print one?	

# 4

## Activity 4: Cleared Checks and Stop Pays

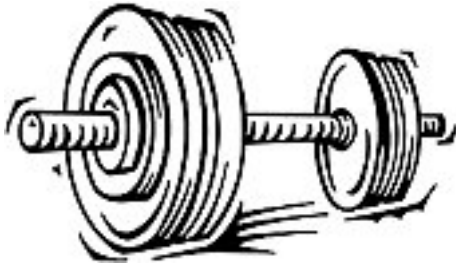
### THE GOAL: CHECKING WHETHER A CHECK HAS CLEARED AND ADDING/CHANGING/DELETING A STOP PAY

For these exercises, you will check for cleared checks and then add, change and delete stop pay information.

- For these exercises, act as though your member has had time to write several checks.

Activity:	Notes:
<p>1. The first member has written a check (Check #2202) with the amount of \$300. The member first wants to know if it has cleared, and if it hasn't, the member wants to place a stop pay on the check.</p> <ul style="list-style-type: none"><li>• First check the checking account to see if the check has cleared.</li><li>• If it has not cleared, add a stop pay to this check.</li></ul>	
<p>2. The member has written a check (Check #2202) with the amount of \$300. The member first wants to know if it has cleared, and if it hasn't, the member wants to place a stop pay on the check.</p> <ul style="list-style-type: none"><li>• First check the checking account to see if the check has cleared.</li><li>• If it has not cleared, add a stop pay to this check.</li></ul>	

Activity:	Notes:
<p>3. The same member calls back and says there was a mix up. The check number the member wants the stop pay on is not check #2202. It is check #2203. The member is not sure of the amount. Make the necessary changes. (Be sure to check that <i>this</i> check has not cleared!)</p>	
<p>4. Your second member calls to place a stop pay on check #8978. Assist this member.</p>	
<p>5. Your second member calls the credit union back a second time. Now the member has lost the last four checks (#1123 – 1126) and wants stop pays placed on all of them. Add a stop pay for all four checks.</p>	



## Activity 4: Flex Your Muscles!

You have completed the exercises. Now test yourself (without notes) on what you just learned!

Question:	Answer:
1. How can you tell if a check has cleared? Which option or button do you use? Which sub account do you use?	
2. How do you add a stop pay for a check? Which option or button do you use? Which sub account do you use?	
3. When adding a stop pay, do you need to enter the amount if you know the check number?	
4. What happens if you add both the check number and dollar amount to the stop pay?	
5. How do you alert other employees to watch for the check for the stop pay (add a comment)?	
6. How do you add a stop pay on a range of checks?	

# 5

## Activity 5: Adding, Changing and Deleting Comments

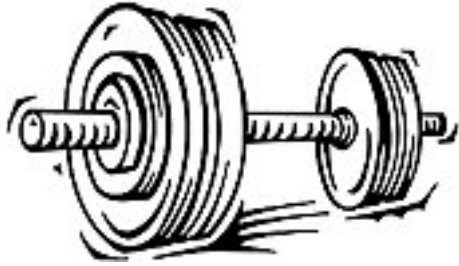
### THE GOAL: ADDING, CHANGING AND DELETING COMMENTS

In these exercises you will practice adding, changing, and removing comments that other credit union employees will see when assisting a member.

Activity:	Notes:
1. Your first member has lost her purse and wants to be sure that employees assisting her ask for her license. Enter a comment that other employee will see when they assist this member.	
2. When you return to the Inquiry screen, what color is the exclamation point on the Comments (F1) button? Once you have noted this change, exit this membership.	
3. The same member returns to the credit union and says that she has found her purse. Re-enter the account and remove the comment. When you return to the Inquiry screen, what color is the text on the Comments (F1) button?	

<b>Activity:</b>	<b>Notes:</b>
<p>4. The same member returns two weeks later to say that now she lost her license. Add a comment about the license. Additionally, add a second comment to always check the ID of this member. Add this second comment so that it is permanently retained by the system.</p>	
<p>5. The second member is also forgetful and loses his identification. Alert other employee that he has asked that people confirm his identity using a comment.</p>	





## Activity 5: Flex Your Muscles!

You have completed the exercises. Now test yourself (without notes) on what you just learned!

Question:	Answer:
1. At what point, when entering a member's account, do you view the comment text?	
2. How do you add a comment for other employees to view when they assist a member? Which option or button do you use?	
3. How do you update the comment's text when more information is available?	
4. When does the Comments (F1) button exclamation point color change? What do the different colors indicate?	
5. How do you add a comment so that it is permanently retained by the system?	
6. How do you add a comment to a membership when the membership already has a comment?	

# Check Your Knowledge!

**So have you learned the material in the *Exercises for Success - Level 1: Member Service*?**

Answer the following eleven questions on the material you just learned – and try to answer *without using your notes*. (You may use CU\*BASE.)

This is your opportunity to check and make sure you are now skilled at all the material covered in this workbook.

Good Luck!

<b>Can You Answer the Following?</b>	<b>Able to Answer (Yes/No)</b>
1. Why would you use the Verify Member (F1) button when transferring funds between two memberships?  What information can you view using this button?	
2. How do you print a Transaction History report for the last month for a member's checking account? What option or button do you use?	
3. How do you transfer \$45.00 from your one member's savings account to the same member's checking account using Phone Operator? What option or button do you use?	
4. How can you tell if the member you are assisting has an email address and license number recorded in the system? Where do you look for the email address? How do you add one if one is not recorded in the system?	

<b>Can You Answer the Following?</b>	<b>Able to Answer (Yes/No)</b>
5. How do you determine if check #445 for the amount of \$42.00 has cleared? Which option or button do you use?	
6. How do you create a stop pay for this check mentioned in the previous question? What option or button do you use?	
7. The member calls back to change the check amount and check number, this time with no amount known. Where do you make these changes?	
8. How do you transfer \$50.00 from your one member's checking account to a second member's checking account? Which option or button do you use?	
9. During the transfer how do you check the license number of the member making the transfer? How can you add a secondary transaction description of "present for birthday," making sure that this description does not appear on the statement of the person having the birthday?	
10. How can you tell what the average balance for the last 60 days of one of a member's checking account is? How do you print a Verification of Deposit form for this member? Which option or button do you use?	
11. How do you add a comment that the member has lost his/her wallet to alert other employees that they should ask for this member's identification? Which option or button do you use? How do you make this comment permanent?	
12. How do you make the comment created above permanent? How do you add a second comment to a membership?	

Can You Do Answer the Following?	Able to Answer (Yes/No)
13. How do you a stop pay to the second member’s membership for a range of checks (check numbers 3309-3312)?	
<b>Out of 13 Review Exercises, I Can Do This Many Without Notes!</b>  <b>(Note areas you need to review below.)</b>	

NOTE: If you have added and stop pays, comments, etc. to your memberships while answering these questions, please return to the memberships and remove them. This will allow other people to use these memberships for the Member Service exercises.

## Areas for Further Review

After completing the final review, I see I need to review the following areas further:

1.
2.
3.
4.