Implementing Your Credit Union's Name Change

Guidelines for Clients and Third-Party Vendors

INTRODUCTION

The following document describes the changes necessary to implement your credit union name change. The first section covers the responsibilities of the individual teams at CU*Answers. Following is a checklist covering the individual tasks.

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Revision date: December 19, 2024

BEGINNING YOUR NAME CHANGE

Contact the CSR Team to begin the credit union name change at least six to eight weeks' notice prior to the effective date is needed.

Please Note: For custom loan and membership forms, additional lead time may be necessary. Lender*VP requires six to eight weeks for processing, and this time frame begins upon Lender*VP receiving a signed authorization form from the credit union. An authorization form will not be sent to the credit union until Lender*VP receives a form file from the credit union's form provider.

CLIENT SERVICES & EDUCATION TEAM

This Team is a key partner in the beginning of your name change. The CSR Team is responsible for collecting the necessary items to begin the name change and will assist you with your introduction to the process. Before sending out the announcement of the name change to the CU*Answers staff, the Client Services & Education Team will collect the following items:

- Colored Logo
    - Preferred: Vector Format with text converted as outlines
    - For example: Adobe Illustrator (AI) or Encapsulated Postscript (EPS)
    - If not available, the highest resolution possible .JPG, .PNG or .TIF
    - Preferably with a transparent background.
- NCUA Approval (Certificate of Name Change and Charter Bylaws)
- Board Approval on letterhead of original name with old name and new name and effective date

Once the logo and proper documentation is collected, the CSR Team will send an email to the CU*Answers staff, including Network Services, announcing the name change and the effective date. This announcement will begin the name change process at CU*Answers. The CSR Team is also responsible for working with Sage Direct to convert your logo to the proper format for use with paper statements. If you use another statement printing vendor, the credit union is responsible for working with that vendor to implement the name change.

On the effective date of the name change, the CSR Team will make several critical behind the scenes changes in CU*BASE. After the update, the credit union will notice, for example, that the credit union name that appears in **It's Me 247**, at the top of some CU*BASE reports, and notices that are associated with the credit union CU*BASE CUID, will be updated.

If the credit union participates in this offering, the credit union name will be updated in the AnswerBook, as well as the credit union's online campus.

XTEND

Xtend will take care of all Xtend Services. This includes making appropriate Shared Branching changes in CU*BASE and notifying other Shared Branching clients of the change. A project sheet will be created to change the Shared Branching configuration in CU*BASE.

- Member Reach Client

  Xtend will coordinate changes to current member communications including email and online banking, Online Banking Community messages, and e-Info messages. In addition, it will make changes to Member Reach Plus (outbound telephone communications).

- Branch XT Client

  For clients using this service for in-bound telecommunications, Xtend will coordinate the necessary internal changes to the credit union telephone system and how it works with the telephone network.

- Additional Services by Xtend
  - Statement Message Content (**Tool #914**). If applicable, credit union name and web site URL will be updated for both New and Closed member messages.
  - Miscellaneous Member Forms (**Tool #261**). Review and update paragraphs.
  - Monthly e-Statement Notification Email Content (**Tool #262**). Review and update content as needed.
  - Sales Information for loan that display in **It's Me 247** (**Tool #470**). Review and update content as needed.
  - Member Instructions visible in **It's Me 247** and **Tool #569**. Review and update content as needed.
  - Bill Pay Marketing Message (**Tool #174**). Review and update content as needed.
  - Tiered Service Level Configurations (**Tool #853**). Review and update content as needed.
  - Member Connect Marketing Tools (**Tool #497**). Review and update content as needed.

LENDER*VP FORMS

If the credit union's logo is pre-printed on the credit union's loan or membership forms, the credit union will need to contact its forms provider to determine if its name or logo appear on any loan or membership forms (either electronic or laser forms). The vendor will then send Lender*VP Forms a file with the appropriate name and logo changes for each affected form. Once the file is received, Lender*VP Forms will contact the credit union with a bid and authorization form to make the appropriate changes. Once the authorization form is signed and returned, Lender*VP Forms will create a project sheet and make the appropriate changes to the forms. The credit union will receive notification through the project sheet updates as the forms move through the update process.

Please note: Lender*VP Forms requires six to eight weeks from the time it receives the signed authorization to complete the update of the forms. The team will convey an accurate timeline to you.

Lender*VP Forms also will assist the credit union in updating its corporate checks and money orders. Once the team is notified of a name change, Lender*VP Forms will send the credit union an authorization form and will request the graphic and signature necessary to make the changes. Once the credit union returns the signed authorization form, graphic, and signature, Lender*VP Forms will create a project sheet and make the appropriate changes.

Additionally, Lender*VP Forms will notify Zoot to update its Table Matrix with the new name.

ADMINISTRATION/FACILITIES

These teams are responsible for updating several contact lists, including: Online and Self Processor email distribution lists, UPS and general shipping address information, etc.

ACCOUNTING

The Accounting Team will keep on file the official credit union documents related to the name and/or logo change, including the NCUA Approval (Certificate of Name Change and Charter Bylaws), and the Board Approval (official notification on letterhead with old and new name and effective date). Additionally, the Accounting Team will update their accounting software to be consistent with the credit union's new name and bill the credit union for the changes associated with the name or logo change.

IRSC (INTERNET RETAIL SERVICE CENTER)/MTG (MOBILE TECHNOLOGIES GROUP)

IRSC is responsible for updating the credit union logo in **It's Me 247**. Once a logo change is announced internally at CU*Answers, a bid will be sent to the credit union for the changes in online banking. Once the credit union returns this signed authorization, a project sheet will be created. On the effective date of the change, teams will update the credit union logo in **It's Me 247**.

This team will also handle the logo changes necessary in the CU Publisher Software. This software handles many features in the **It's Me 247**/Mobile Web Banking, Mobile App and website processing.

PROGRAMMING

The Programming Team makes changes to configuration files associated with CU*BASE. CU*Answers' internal project tracking system will also be updated.

WEB SERVICES

If the credit union's website is hosted by CU*Answers, the credit union is responsible for contacting the Web Services Department to add additional domains, or for making changes to the credit union website, including changes to email addresses, names or website addresses. Additionally, the Web Services Team can assist the credit union with posting a news story or article about the name change on its website.

If the credit union's website is not hosted by CU*Answers, it is the credit union's responsibility to make the appropriate changes.

OPERATIONS

The Operations Team updates its daily processing run sheets.

Network Services

If CU*Answers provides the credit union's receipt printers, the Network Services team will contact the credit union once it is notified of the credit union name change. Network Services will send a bid to the credit union, which will need to be signed and returned prior to work being done on this process. The credit union name will also be updated in the CU*Answers phone system and CU*TALK.

The credit union is responsible for completing a store order form to update their "from" email address. After the form is submitted, Network Services will verify the settings and process the change.

Imaging Solutions

This team is responsible for updating the name and/or logo on the credit union's e-statements as well as the profile in CU*Archives CD archiving program.

Item Processing

If the credit union utilizes CU*Answers Item Processing, eDoc Check Logic, or RDC (remote deposit capture), this team will make the appropriate changes.

Additional Items

Additional email groups, including or Constant Contact Newsletters will be updated by the CU*Answers employee responsible for the group or newsletter.

Credit Union Responsibilities

The credit union begins the name change by contacting the Client Services & Education Team. It informs the CSR Team of the name change, contact, and effective date information. It is reminded by the CSR Team of its responsibilities to contact its vendors (as well as the Web Services team if appropriate) and to update the email addresses of its employees' profiles in AnswerBook. The CSR Team collects the necessary documents from the credit union to begin the change process.

The credit union is responsible for notifying its third-party vendors of the name change (i.e. credit bureaus, plastics, etc.). If the credit union uses Experian, Experian will require a letter documenting the name change like the one you sent to CU*Answers.

Receipts are handled in a slightly different method. If CU*Answers is responsible for the credit union (ProDOC or non-ProDOC), Network Services will contact the credit union to initiate the process once the internal email is sent. If CU*Answers is not responsible for the credit union's receipts, then the credit union is responsible to contact their receipts vendor.

The credit union will also have to submit a store order form to have their "from" email address updated.

Changes Requiring Project Sheet and Quote

These items will incur a cost to the credit union. The appropriate CU*Answers employees will create project sheets so that the credit union can monitor progress on the item. Additionally, bids may be created by CU*Answers staff and these must be signed and returned before action can be taken by CU*Answers employees. **All items may not apply to all credit unions.**

- Corporate Check Logo
- Custom Loan Forms
- Custom Membership Forms
- Thermal Receipts
- **It's Me 247** Logo
- Custom OBC stories "Coming Soon" or "Our Name is Changing" article
- Statement Logo
- Xtend Shared Branching Configuration Program
- Website Changes

CU*BASE Member-Facing Programs to Be Updated By The Credit Union

Branding your credit union is a key element of a credit union name change. Xtend can assist you with communicating this message to your members, or these steps can also be performed by your credit union. **All items may not apply to all credit unions.**

- Marketing Tips.
- Member Connect Signature Line (**Tool #497**). Select message type 'SL'.
- Update Statement Message/Inserts (**Tool #914**).
- Update Monthly e-statement email (**Tool #262**).
- Online Banking VMS Configuration Change (**Tool #569**). Select all Member Instruction Tool bars to ensure that references to credit union name or website are correct.
- Online Banking VMS Configuration Change (**Tool #569**), Helpful Links, to update credit union name and website.
- Bill Pay Marketing Message (**Tool #174**).
- Member Rate Maintenance (**Tool #470**) and (**Tool #506**). Verify that all references to name or website are correct.
- Talking Points for Rate Inquiry and Loan Quoter (**Tool #470**) and (**Tool #506**).
- Cross Sales Trackers and Need Groups (**Tool #242**). Update Tips and Procedures.
- Update Miscellaneous Member Account Forms (**Tool #261**).
- Update Laser CD Forms (**Tool #257**).
- Tiered Service Levels Program Config (**Tool #853**). Reference the member statement messages and lifetime points program.