## **Deleting Policies from the CU Policies Manual**

A policy can be deleted one of two ways: At the individual policy level, which allows you delete a single policy, or using the Delete Policies utility, which allows you to archive multiple polices at once.

## **Option 1: Delete multiple policies at one time.**

- 8. Click on the "CU Policies" tab at the top left of the screen to make sure you are in the CU Policies Manual.
- 9. Using the plus signs to the left of each folder, expand the "MANUAL ADMINISTRATION" and the "MANAGE POLICIES & SETTINGS" folders.
- 10. Click on the "Delete Policies" link in the "MANAGE POLICIES & SETTINGS" folder.
- 11. On the right side of the screen, a full list of all policies in the CU Policies will appear, with a checkbox next to each policy.
- 12. Click the checkbox next to each policy you want to remove.

CU Policies Model Policies Archived Policies	
Search CU Policies: Search	Delete Policies
<ul> <li>MANUAL ADMINISTRATION</li> <li>ENT. CU POLICIES &amp; SETTINGS</li> <li>MANAGE POLICIES &amp; SETTINGS</li> <li>Add Model Policies to CU Policies Manual</li> <li>Add Unique Policies and Chapters</li> <li>Manage Date Settings</li> <li>Archive Policies</li> <li>Archive Policies</li> <li>POLETE Policies</li> <li>PUBLISHING TOOLS</li> <li>REPORTS</li> <li>Update This Menu Tree</li> </ul>	Check one or more policies below and click the "Delete" button to dele Note: If you remove a top level chapter (i.e. 1000, 2000), you will no level chapter in your manual unless you will never be using any policies Select/Deselect All 1000: Administrative 1100: Leadership 1140: Credit Union History 1160: Strategic Planning 1205: Board of Director's Duties 1300: Audits 1400: Legal Counsel 1500: Staffing 2000: Operations 2110: General Operations Policies 2110: Bank Secrecy Act/Anti-Money Laundering Program

13. Scroll to the end of the page and click the "Delete Selected Sections from Manual" button.

11010: Risk Based Pricing
$\Box$ 11012: Disclosure Of Information To Victims Of Identity Theft
$\square$ 11015: Obtaining and Using Medical Information
11016: Affiliate Marketing Rules
Delete

- 14. A confirmation box will pop up, and once confirmed, the selected policies will be removed from your CU Policies.
- 15. Policies that are removed by mistake can be restored by the CU PolicyPro support staff. Contact policysupport@cusolutionsgroup.com for assistance.

Note: To delete an entire chapter, you must check <u>all</u> the policies within that chapter. Deleting just the chapter folder (1000, 2000, etc.) will only delete that chapter page, not all the policies within the chapter. If a top level chapter page is deleted, any policies within that chapter will no longer be accessible for editing in the CU Policies. They will, however, appear in the published manual.