

Key Fields Content

CU PolicyPro model policy content includes a series of *Key Fields* to assist with customization of the model policies. Key Fields are bits of information which are important to completing the policy, but will vary from organization to organization. An example of a Key Field would be the dollar threshold for expensing an asset versus depreciating an asset.

Not every policy has Key Fields, and some policies have many Key Fields. A full list of the Key Fields, which includes the Key Field number and a brief description of the Key Field, can be found in the *Key Fields Guide* document.

Within the content, a Key Field is a small piece of code. The Key Field code is typically a number enclosed in double brackets (e.g., `[[3030-1]]`). The first number of the Key Field correlates to the policy number, making Key Fields easy to find throughout the Manual.

For any policy that contains a Key Field, the Key Fields are listed directly below the content area. There is a link to the Key Field database editing window, a listing of the content entered for the Key Field, and a description of the Key Field.

Tip: If the “Contents” of the Key Field is the Key Field number, the Key Field has not yet been defined.

The screenshot shows a user interface for managing Key Fields. At the top, there are five buttons: Save, Preview, Archive, Preview Last Published, and Delete. Below these buttons is a section titled "Key Fields" containing a table with three columns: Key Field, Contents, and Description. The table lists two key fields: `[[3130-1]]` with a content of \$600 and a description about expenditures, and `[[3130-2]]` with a content of `[[3130-2]]` and a description about depreciation methods. Three callout boxes with red arrows point to the table: one to the "Key Field" column, one to the "Contents" column, and one to the "Description" column.

Key Field	Contents	Description
[[3130-1]]	\$600	Insert the amount of expenditures that will be expensed.
[[3130-2]]	<code>[[3130-2]]</code>	Define the depreciation method the Credit Union will use for depreciating fixed assets

Link to Key Field Database

Current Key Field Content. If the content is the Key Field number, the Key Field has not yet been defined.

Description of what the Key Field will be defining.

Defining Key Fields

Key Fields can be defined one of two ways: At the individual policy level, which allows you to define the Key Fields for a single policy, or using the Manage Key Fields, which allows you to define Key Fields for multiple policies at once.

Define Key Fields at the Individual Policy Level

1. Click on the “CU Policies” tab at the top left of the screen to make sure you are in the CU Policies manual.
2. Using the plus signs to the left of each folder, expand the “MANUAL ADMINISTRATION” and the “EDIT CU POLICIES” folders.
3. Open a policy that contains Key Fields.
4. Go to the Key Fields area below the policy content, and click on the link to the Key Fields database.

Key Fields		
Key Field	Contents	Description
[[3130-1]]	\$600	Insert the amount of expenditures that will be expensed.
[[3130-2]]	[[3130-2]]	Define the depreciation method the Credit Union will use for depreciating fixed assets

Link to
Key Field
Database

5. A pop up box will open. Define the Key Field in the box labeled “Enter Your Key Field Content Here”. Remove the Key Field number as it is only an indicator that the Key Field has not yet been defined. If the Key Field number is not removed, it will print as part of the policy.
6. Click the “Update Key Field” button to save your changes.

Insert Internal Links - Mozilla Firefox

policyprobeta.leagueinfo.com/mem/ops_manual/adm/insertkeyfield.php?ACTION=EDIT&init=i

Edit Key Fields

Name 3130-2

Enter Your Key Field Content Here

straight line

Update Key Field Cancel

Description

Define the depreciation method the Credit Union will use for depreciating fixed assets

Define Key Fields at the Individual Policy Level (Continued)

- Once you have updated the Content of the Key Fields, the content will not show up until the page is refreshed. The easiest way to do this is to save the policy. **Until the page is refreshed, you will not see your content in the Key Fields area.**
- After the page is refreshed and the custom content appears in the Key Fields area, the actual text within the policy will still show the bracketed Key Field number. This is because within the content of the policy, the bracketed Key Field number is a piece of code that will be replaced with the Key Field “Contents” once it is printed.
- Use the “Preview Working” button to see the Key Field replacement. Publishing the manual will also insert the correct text into the Key Field code area.

The screenshot shows a web-based editor for a policy. At the top, there is a text area containing the text: "4 DEPRECIATION METHOD. The Credit Union will use the [[3130-2]] method when depreciating fixed assets. The Board may empower management to instruct the accounting department to use a different method as it deems necessary. Any such change in method will be noted in the Board minutes." A red box highlights the code "[[3130-2]]". A callout box points to this code with the text: "Text in the policy remains a piece of code."

Below the text area, there is a section for "Added to CU Policies from Model Policies: 06/29/16" and "Model Policy Last Revised: 07/01/09". There is an "Editor Note:" field and buttons for "Save", "Preview", "Archive", "Preview Last Published", and "Delete".

At the bottom, there is a table of Key Fields:

Key Field	Contents	Description
[[3130-1]]	\$600	Insert the amount of the asset sold and the sales price will be recorded as a gain or loss. Fixed assets will be depreciated over the service life of the asset. Assets will remain on the books at cost for as long as the Credit Union owns the asset.
[[3130-2]]	straight line	Define the depreciation method when depreciating fixed assets.

A callout box points to the "Contents" column of the table with the text: "“Contents” updates in the Key Fields area."

The screenshot shows a browser window titled "Section Preview: SECTION - Mozilla Firefox". The address bar shows the URL: "policyprobeta.leagueinfosight.com/mem/ops_manual/adm/section_preview.php?passedid=8203". The main content area displays the following text:

2. **EXPENDITURES.** All expenditures under **\$600** will be expensed and all others will be depreciated.

DEPRECIATION SCHEDULE.

The depreciation accounts will be removed from the books. Any difference between the net value of the asset sold and the sales price will be recorded as a gain or loss. Fixed assets will be depreciated over the service life of the asset. Assets will remain on the books at cost for as long as the Credit Union owns the asset.

4. **DEPRECIATION METHOD.** The Credit Union will use the **straight line** method when depreciating fixed assets. The Board may empower management to instruct the accounting department to use a different method as it deems necessary. Any such change in method will be noted in the Board minutes.

A callout box on the left side of the browser window contains the text: "In “Preview” (and published) mode, the Key Field code is replaced with the Key Field definition."

Define Key Fields directly in the Key Fields Database

1. Click on the “CU Policies” tab at the top left of the screen to make sure you are in the CU Policies manual.
2. Using the plus signs to the left of each folder, expand the “MANUAL ADMINISTRATION” and the “MANAGE POLICIES & SETTINGS” folders.
3. Click the “Manage Key Fields” link under the “MANAGE POLICIES & SETTINGS” folder.
4. On the right side of the screen, a full list of all Key Fields in the Key Fields database will show. **Note:** There are many Key Fields, so the Key Fields list is very lengthy. You will need to scroll to see all of the Key Fields.
5. Scroll to find the Key Field you want to define, and define the Key Field in the “Current Value” column (the third column to the right). Remove the Key Field number as it is only an indicator that the Key Field has not yet been defined. If the Key Field number is not removed, it will print as part of the policy.

Key Field Number	Description	Current Value
3125-1	Identify and list Credit Union officers authorized to approve transfers between correspondent financial institutions.	[3125-1]
3130-1	Insert the amount of expenditures that will be expensed.	\$600
3130-2	Define the depreciation method the Credit Union will use for depreciating fixed assets	straight line
3155-1	Insert the maximum daily expense allowance for employees traveling on Credit Union business.	[3155-1]

Define or review Fields in the “Current Value” column.

6. To save your Key Field definitions, scroll to the very end of the Key Fields listing and click the “Save” button. **This is very important!** If you leave the Manage Key Fields area without clicking the “Save” button, your changes will not be saved.

9430-1 Specify whether the periodic statement will include an opt-in or out-out notice [9430-1]

Save