September, 2018

Dear CU PolicyPro Client,

On behalf of the CU PolicyPro Support Staff, we hope the credit unions, staff members and families affected by the recent storms are on the road to recovery.

We typically would have policy updates in September, but because we are waiting for additional guidance and updates to several laws and regulations, including HMDA, BSA, S.2155, and more, our policy updates will be delayed until we have sufficient time to review the guidance and our policies to determine if any changes are needed. We are also investigating the development of two new policies: Small Business Administration (SBA) Loans and Charitable Donation Accounts. We need a little more time to review existing policies in light of other recent regulatory changes and hope to have these out in October or November. If you have any questions on policies, or are hearing anything from your examiners, please let us know! We value your feedback and many of our new policies and policy clarifications are based on client requests and examiner feedback.

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Monthly OPS Notes Release: Survey Results

Our survey results are in, and we are busy reviewing them. We did see a number of responses to the question of "What enhancements would you like to see for CU PolicyPro?" which are either already existing features of CU PolicyPro or a tool within CU PolicyPro that may meet the needs of those requests. We wanted to take a few minutes to highlight those tools so you can be sure you are getting the most out of CU PolicyPro!

Tracking/Auditing
We had a number of requests for people looking for a way to track changes as they make policy edits, make notes on a policy, or to have an auditing trail or historical record of what was updated in their own policies. Two tools are available in CU PolicyPro that can help: Editor Notes and the Track Changes tool.

Editor Notes are found just below the content area and can be used by the credit union to document any changes made to a policy. Users can record customization the credit union has done to a model policy, indicate new or updated verbiage, document updates applied from the model policy updates, or make any notes that are relevant to that policy. In the Reports area, there is an Editor Notes Report which can be used as a full audit trail and historical record for any policy. It is important to know that if a policy is deleted and a new version of that policy is added from the Model Policies area, the Editor Notes from the deleted policy do not carry over to the new policy. We have many credit unions that currently use the Editor Notes and have a full record of what was changed, when it was changed and who

made the changes. If you're not using Editor Notes, check them out today and consider adding notes as part of your policy update procedures.

When making updates to your content, the Track Changes tool allows you to see those changes using redline formatting. New text is shown in red, and deleted text is shown as strikethrough text. Once reviewed, users can "accept" or "reject" individual changes, or all changes at one time. Policies published in Track Changes mode will show those changes are part of the published document. Many credit unions will publish a manual with all approved changes prior to accepting them so they have a record of exactly what changed in the policy. Together with the Editor Notes, this creates a very strong auditing trail for the policies. For more on Editor Notes and Track Changes, please view Segments 4 and 6 of the New User Video Training.

Emailing Policies
Several users asked about emailing or sharing policies with other staff members. We have an FAQ that covers this! Please visit our support site FAQs for some suggestions on how to share your policies.

User Access
Some users asked if there were access levels with limited access, so that users can access policies without having admin access, or can access policies without the ability to edit. The CU PolicyPro system has two default access levels, "admin" and "employee" (read-only). Admin users can create custom levels of access to provide full editing or read-only access to the policies, and/or access to the Resources, CU Documents, and Manager folders. For more information on creating and applying access levels for users, please view Segment 11 of the New User Video Training.

We hope you find this information helpful and as always, welcome your feedback and suggestions for CU PolicyPro!

Questions?

If this information was forwarded to you, and you'd like to be on the distribution list to receive information and updates related to CU PolicyPro, or if you have any questions regarding the CU PolicyPro content, or questions on how to use the system, please contact policysupport@cusolutionsgroup.com

Thanks and have a great weekend!