QUICK START GUIDE

Use the Quick Start Guide for the very basics –
finding policies, viewing and printing model content, and adding model content to your policy manual.

For additional information on how to use CU PolicyPro, including editing policies, adding users, publishing and posting your manual, we recommend watching the New User Training video series. To access video training, visit the CU PolicyPro Support site at : http://www.leagueinfosight.com/support

For technical support, please contact policysupport@cusolutionsgroup.com.

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Manual Basics

When you login to your new manual, the default screen is the "Home" page. On the top navigation screen are several options.

- **Policies** – This is where policies are stored and edited. In Policies, you will find the "CU Policies" manual (your manual) and the "Model Policies" manual (the model policies). For newly created implementations, the *CU Policies* manual contains a model chapter structure, but no policies have been added. This Guide will walk you through how to access the model policies and add them to your *CU Policies* manual.

- **Resources** – this contains current and archived information for CU PolicyPro, including our monthly newsletter, policy update information, and some useful tools (forms, checklists, etc.).

- **CU Documents** – this provides an area for you to upload supplemental documents. The items in storage can be posted on the "Home Page" to provide easy access for your users.

- **Administration** – this area allows you to add and edit users. There is a tab that will allow you to add a welcome message on the "Home Page".

- **Training/Support** – this provides a link to our Support site which includes training materials including written and video instructions, FAQs and content update information.

All policies are housed in the POLICIES area of CU PolicyPro. All steps in the remainder of this document take place in the POLICIES. POLICIES can be opened by clicking on the "POLICIES" link in the top navigation.
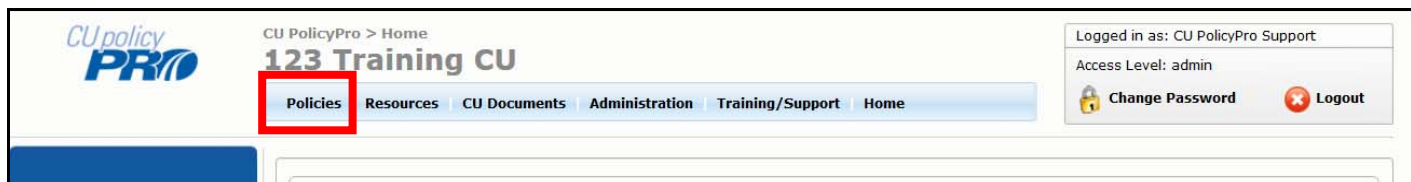
In the Policies area, near the top left of the screen, there are tabs to access your CU Policies, the Model Policies and Archived Policies. When you open the Policies area, by default you will be in CU Policies.

To move between the CU Policies, Model Policies or Archived Policies, click the corresponding tab.

When you first enter the Policies area, some resources for Getting Started are available on the right side of the screen. As you move through the navigation found in the CU Policies, Model Policies and Archived Policies, the information on the right side will change.
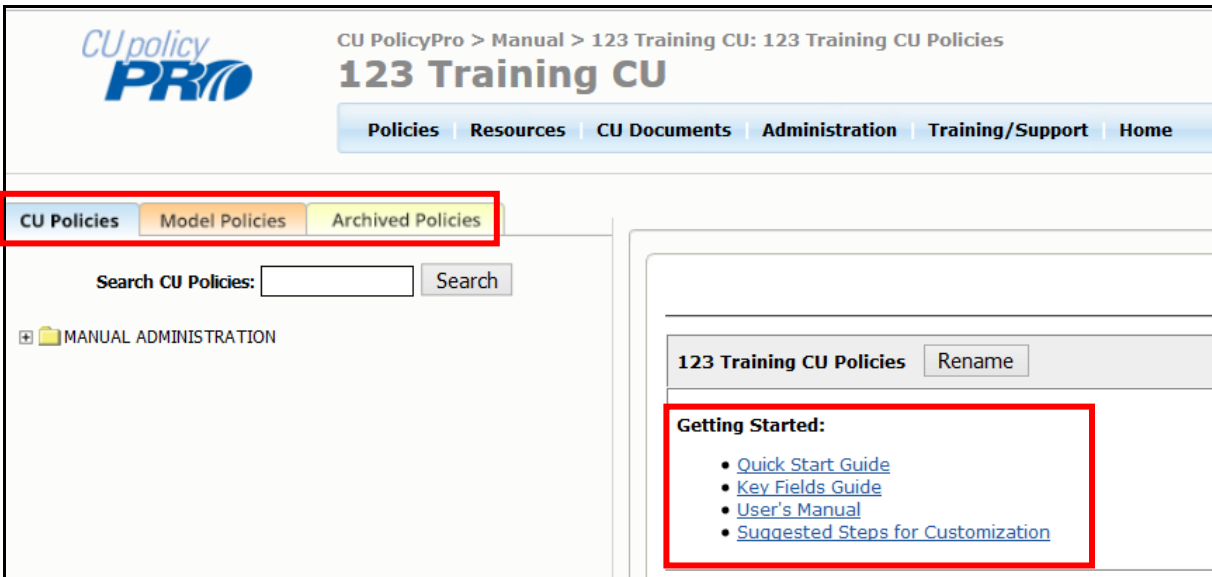
Important Definitions

- The **CU Policies** manual is used to maintain and customize the policies for your organization. The CU Policies manual contains the top level chapter folders, but does not contain any policies unless they have been added. Model policies can be added to the CU Policies manual from the Model Policies manual, or unique policies may be added.

  - Note: The policies within the CU Policies manual can (and should) be customized for your organization. The actual content in the CU Policies may contain model policy content if you have not yet customized the content.

- The **Model Policies** manual contains all available model policies. Any model policy can be moved from the Model Policies manual to the CU Policies manual.

- The **Archived Policies** manual houses any policies that have been archived from the CU Policies manual. Policies are **not** archived automatically.

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<u>Viewing & Printing Model Policies</u>

1. Click on the "Model Policies" tab at the top left of the screen to make sure you are in the Model Policies manual.

2. Click the plus sign next to the "MANUAL ADMINISTRATION" folder and the "MODEL POLICIES" folders to expand both folders.

3. You will see a listing of all the available model polices. Model Policies are indicated by a grey background and cannot be edited. The content must be moved to the CU Policies manual in order to be edited.

4. Click on the model policy you would like to view, and the full text of the policy will appear on the right side of the screen.

5. To Print a model policy, click the "Print" button at the top of the model content.

    Note: While it is recommended to take full advantage of the policy management system in CU PolicyPro, for those credit unions who wish to maintain their policies in Word, the model policy content can be copied/pasted to Word from the Model Policies manual.
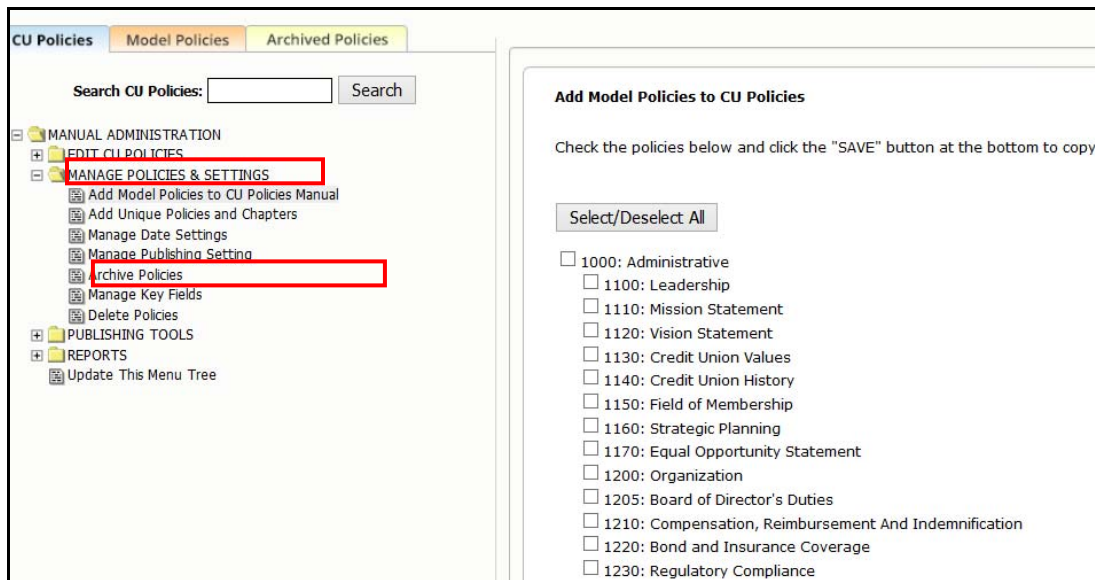
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Adding Model Policies to the CU Policies Manual

Adding model policies from the Model Policies manual to the CU Policies manual can be done one of two ways.

Option 1: Add multiple policies at one time. This option works best if you know exactly what policies you'd like to bring into your CU Policies manual, and do not need to review the content prior to bringing the content into your CU Policies manual.

1. Click on the "CU Policies" tab at the top left of the screen to make sure you are in the CU Policies.

2. Using the plus signs to the left of each folder, expand the "MANUAL ADMINISTRATION" and the "MANAGE POLICIES & SETTINGS" folders.

3. Under the "MANAGE POLICIES & SETTINGS" folder, click the "Add Model Policies to CU Policies Manual" link. On the right side of the screen, a form will appear listing all model policies available from the Model Policies manual, with a checkbox next to each policy.

4. Click the checkbox next to each model policy that you want to move from the Model Policies manual to your CU Policies manual.

5. Scroll to the end of the page and click the "Save" button. The current model policy for each selected policy will be added to your CU Policies manual.

Note: If one or more of the policies selected is already part of the CU Policies manual, you will be prompted to choose for each policy if you wish to 1) overwrite the current policy or policies if there is more than one instance of a particular policy, 2) create an additional copy of the policy, 3) cancel if you do not want to add the policy.

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Option 2: Add one policy at a time. This option works best if you want to review the content of a model policy before adding the policy to the CU Policies manual.

1. Click on the "Model Policies" tab at the top left of the screen to make sure you are in the Model Policies manual.
2. Using the plus signs to the left of each folder, expand the "MANUAL ADMINISTRATION" and the "MODEL POLICIES" folders.
3. You will see a listing of all the available model polices.
4. Click on the model policy you would like to view, and the full text of the policy will appear on the right side of the screen.
5. Click the "Copy to CU Policies Manual" button.
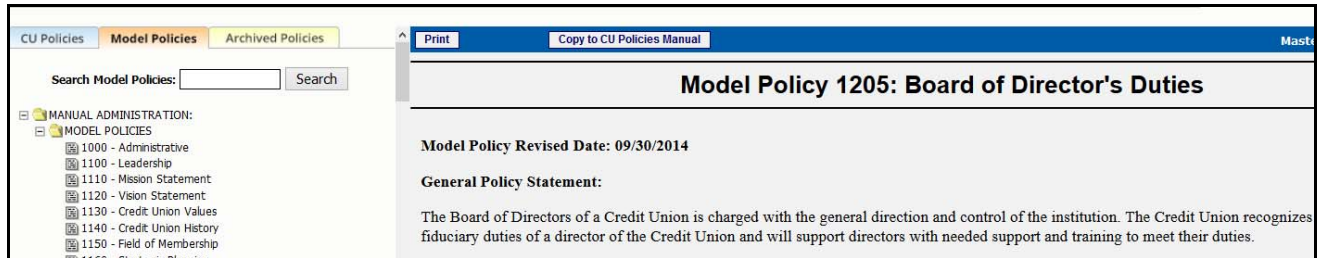
Finding a Specific Policy

If you're looking for a specific policy, you can use the "Search" function, found in the upper left side of the navigation. Either the *CU Policies* or *Model Policies* content can be searched; however, for a complete search of the model content, we recommend you search from the *Model Policies* manual.

Also, the **Alphabetical Policy List** is a great tool to find a specific policy. The Alphabetical Policy List is found in the RESOURCES area of CU PolicyPro under the TOOLS Folder.