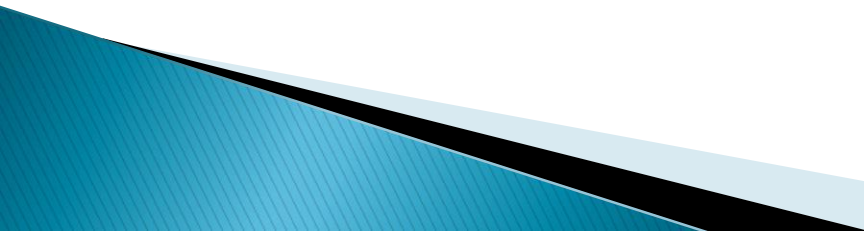# CUPolicyPro

New User Training

Mary Ann Koelzer
Technology Product Manager
CU Solutions Group
MaryAnn.Koelzer@cusolutionsgroup.com
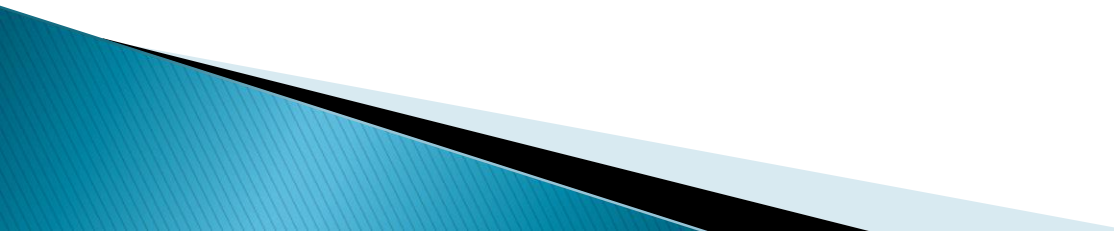(she/her/hers)

What is CU PolicyPro?

- 230+ completely developed model policies, researched and written by Credit Union experts

- Complete Policy Management System including auditing tools, update information, secured distribution of policies, and policy review assignment capabilities

- Reference and direction for departments, while staying current with regulatory changes

- Designed for federal regulatory compliance

How Credit Unions Use CU PolicyPro

- Model policy resource center

- Policy management system
  - Model policy resources center
  - Creating, storing, and distributing policies
  - Auditing tools
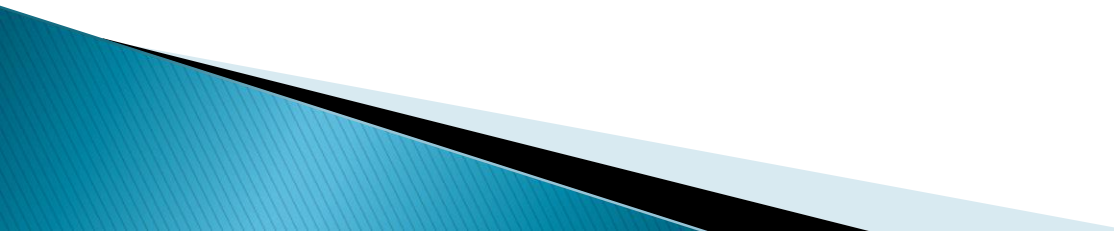 - Policy Review Assignments

System Features

- Content editor allows complete customization of any model policy, with editing access based on user rights

- Publishing feature allows several policies to be selected and published into one printable document, with access based on user rights

- Resources area of system documentation, with the ability for the CU to upload their own secure documents, with access based on user rights

- Auditing tools include track changes, notifications of policy updates, auditing notes, and activity logs

- Assignment reviews with email notifications/reminders

Terminology

- **Model Policies/Model Policies Manual**. Policy templates created and updated in response to federal law.

- **CU Policies/CU Policies Manual**. The credit union's own policies which can be customized and managed using the policy management tools.

- **Published Manual**. A point-in-time document including several CU Policies

- **Key Fields**. Specific credit union information defined and used in the policies as part of the customization process.

- **Administration/Administration Area**. The area of CU PolicyPro where the credit union's policies are managed, published, and distributed. In addition, resources are uploaded, assignments are created, and users are managed in this area.

- **User Groups/Groups.** Created and assigned in the *Users* area, groups provide additional access rights to non-admin users.

User Access Levels

Four Default Access Levels

- **Admin** –full, unrestricted access to perform any function in CU PolicyPro. Functions exclusive to Admin users are managing users and managing site settings.

- **Editor** – full, unrestricted access to perform any function related to CU Policies.

- **Reviewer** – full, unrestricted access to view all policies, including any published manuals.

- **Basic** – view access to model policies, published manuals available to all users, resources available to all users, and support documentation.

User Groups

User Groups (Groups) provide additional access rights to non-Admin users.

Groups can be used in one of two ways:

- Add **viewing rights** to published manuals or folders/files added to Resources

- Provide **access to functions within the Administration area** such as viewing and editing CU Policies, Publishing, Managing Archives, managing assignments, and managing files.

Additional Information

▸ If you do not have a login to CU PolicyPro, or are having trouble logging in, contact your system administrator or our support staff (policysupport@cusolutionsgroup.com)

▸ Quick Guides related to today's training (found in the Support area of CU PolicyPro)

- Getting Started
- Viewing and Printing Model Policies
- Viewing and Printing CU Policies
- Adding Model Policies to the CU Policies Manual
- Adding Unique Policies to the CU Policies Manual
- Deleting Policies from the CU Policies Manual
- Editing CU Policies: Overview
- Editing CU Policies: The Toolbar
- Editing CU Policies: Formatting Bulleted and Numbered Lists
- Editing CU Policies: Key Fields
- Editing CU Policies: Managing Dates
- Editing CU Policies: Auditing Tools
- Publishing CU Policies