CU PolicyPro

Managing your operation's policies just got easier.

CU PolicyPro includes more than 230 detailed model policies that can help your credit union manage today's ongoing compliance and operational challenges. The comprehensive suite contains model policies that are compliant with regulations and written especially for credit unions by experts. It includes model policy content, plus a full policy management system that can be customized to fit a credit union's individual operations.

Stay on top of regulatory changes with CU PolicyPro. Model policies are updated quarterly to keep current with changing laws and regulations.
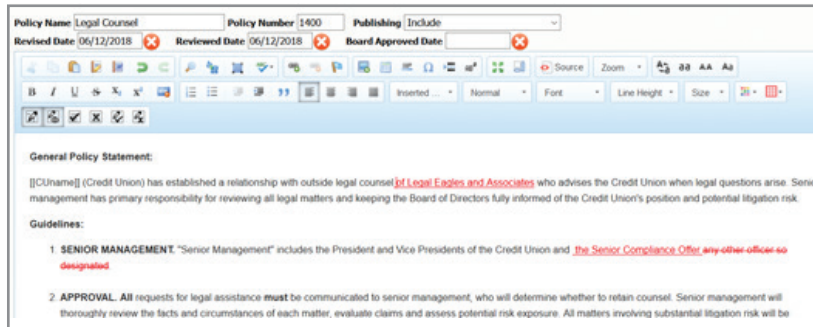
CU PolicyPro provides staff, management, board and regulators easy access to policies and policy updates.

CUPolicyPro

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CU PolicyPro

Powerful Software Features

- Publishing feature allows selected policies to be compiled into one printable document that can be posted in read-only format on the site for staff, board or examiners to view
- Multiple levels of access range from full administrative to read-only
- Tools to track changes and add editor's notes to provide audit and review capabilities

Sample Policy Editing Screen

Reporting to help ensure your policies are customized and current

- Snapshot view of policies in the system and all associated activity dates
- Editor notes report provides a printable audit trail of changes

Additional Key Features

- Existing credit union policies can also be added to and maintained within the system
- Secure, web-based platform allows authorized staff to securely access, view, print and update policies from any internet connection at any time
- Robust policy management tool allows easy maintenance of policies all in one place

- Resources area includes an archived history of changes made from the content updates, newsletters and other tools to help make managing policies a little easier
- CU Documents area allows supplemental documents to be uploaded and posted on the home page for viewing by authorized staff
- Comprehensive, on-demand suite of user training videos are available to easily learn how to use the system
- Knowledgeable and friendly support staff are available to assist with technical support, compliance questions, or general best practices and tips for using CU PolicyPro

Make managing your policies easier with CU PolicyPro. Call **800.262.6285, ext. 486** or email **PolicySupport@CUSolutionsGroup.com**.

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