CU policy PRO

Managing Your Operations Policies Just Got Easier With CU PolicyPro

CU PolicyPro can help your credit union manage today's ongoing compliance and operational challenges thanks to its more than 230 detailed model policies. This comprehensive suite of model policies was written especially for credit unions by legal and financial experts.

Because your credit union is unique, CU PolicyPro not only includes the model policy content, but a full policy management system that lets you customize any model policy to fit your credit union's individual operations. Your existing polices can also be added to and maintained within the system. CU PolicyPro's publishing tool lets you compile multiple policies into one printable

Key Features

Created by Experts	Developed and written especially for credit unions by legal and financial regulatory experts, CU PolicyPro is fully compliant with NCUA regulations.
Secure, Web-based Platform	Authorized staff can securely access, view, print and update policies from any Internet connection at any time.
Complete Solution	Its more than 230 model policy templates can be easily edited to reflect each credit union's specific operations. Policies unique to the credit union can also be added and maintained within the system. The policy management tools are robust yet easy to use, allowing easy maintenance of policies all in one place.
Publishing	The publishing tool 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.
Content Updates	Model policies are reviewed and, if necessary, updated to keep current with changing laws and regulations. New policies are often created as part of the updates as well.
Resources Access	The Resources area includes an archived history of changes made from the content updates, archived newsletters and other tools to help make managing your policies a little easier.
CU Documents Area	The CU Documents area allows supplemental documents to be uploaded and posted on the home page for viewing by authorized staff.
User Security	Set different levels of access for staff ranging from full administrative access to read-only access.
Training & Support	Comprehensive on-demand user training videos are available so you can easily learn how to use the system on your own schedule and CU Solutions Group staff are available to assist with technical support, questions related to content or general best practices and tips for using the manual.

More than 200 policies are included for the following topics:

- Administrative
- Accounting
- Asset/Liability Management
- Fair Credit Reporting Act
- Federal Regulations
- Investments
- Lending
- Operations
- Other Real Estate Owned
- Record Retention
- Security