

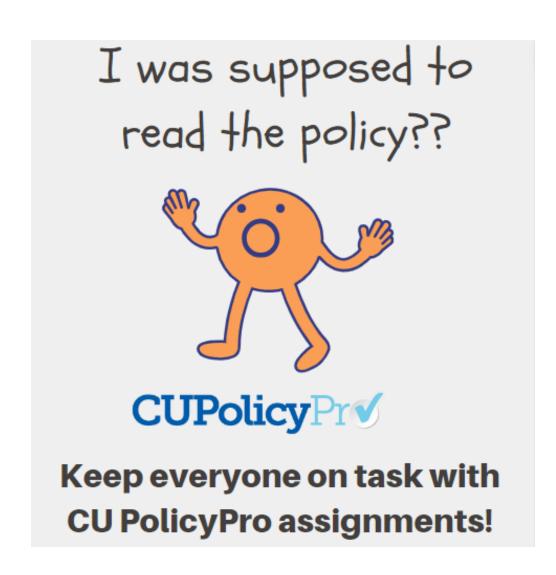
Getting the Most from CUPolicyPro

Brought to you by the Virginia Credit Union League
Presented by Mary Ann Koelzer
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What is CU PolicyPro?

- 230+ model policies and procedures
- Policy management system
 - Create, edit, store, and distribute policies and procedures
 - Auditing tools
 - Policy and Document Review Assignments
- Board Resources
 - Secure document storage and distribution
 - Policy reviews with tracked changes to include with board minutes
 - Assign/Remind board members to review policies/documents
- Deeply discounted for affiliated credit unions!



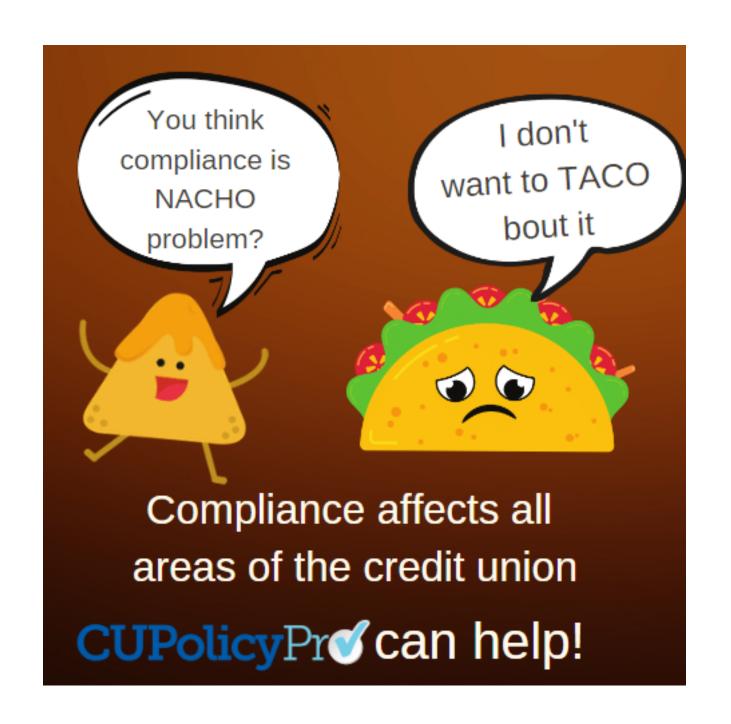
Training Reminders

- Utilize the Support area for a refresher on how to use the system tools and functions
- **Publishing** options allow several content sections to be selected and published into one printable document, with access based on user rights
- Take advantage of the Auditing tools such as track changes, auditing notes, notifications, and date fields
- Use the Assignment feature to help keep policy review and maintenance on schedule, and keep staff engaged with the process
- The Multi-Content Functions tab can be used to apply Revised, Reviewed, or Board Approved dates to multiple content sections at one time
- Sign up for the monthly newsletter on the Newsletter page in the Support area



Getting Access and Support!

- Find your unique URL
 https://www.leagueinfosight.com/client-listing
- Use the Forgotten Password link if needed
- Contact
 <u>policysupport@cusolutionsgroup.com</u>
 with questions or if you need assistance



RecoveryPro

- RecoveryPro will help you develop and implement an effective Business Continuity Plan!
 - Analyze & Assess: Identify and prioritize business processes and assess the risks and impacts of a variety of event types
 - Plan & Prepare: Develop plans, prepare to manage incidents, and recover your business if an incident occurs
 - Validate & Maintain: Ensure your plans are effective and your teams are ready through testing, content reviews, and updates



RecoveryPro is deeply discounted for affiliated credit unions

Asset Size	Annual Affiliated Credit Union Pricing	Annual Non-Affiliated Credit Union Pricing
Under \$50 million	\$249	\$599
\$50 million - \$150 million	\$549	\$1,399
\$150 million - \$350 million	\$1,049	\$2,599
\$350 million - \$1 billion	\$2,549	\$6,199
Over \$1 billion	\$4,549	\$10,999

- RecoveryPro is on the same platform as CU PolicyPro, so your technical training has already been completed!
- Learn more or purchase RecoveryPro at https://www.leagueinfosight.com/recoverypro