



Tutorials

How to incorporate the Master updates
into your Working Manual

Updating Your Working Manual

There may be policies that you want to update, but you have already customized for your credit union. For these policies, you need to make a decision:

A. Use the Tracked Changes documents from the library as a guide to incorporate the new changes into your existing customized policies

B. Archive your customized policies, bring in the revised policy in its entirety, then re-customize it with your credit union information

Which way you decide will depend on how many revisions the policy has, and how much customization you have already done. If a large revision was made, it may be easier to bring in the revised policy in its entirety, then re-customize it with your credit union information than trying to incorporate all the changes to your existing policy

The following tutorial demonstrates how to remove an old policy, and completely replace it with the updated policy from the Master.

Updating Your Working Manual

There are three basic steps to bringing in the updated policies in their entirety:

1. Archive (if necessary) the previous version of the policy
2. Remove the previous version of the policy from the Working manual
3. Bring in the updated/new policy from the Master manual to the Working manual

(Note: If you are bringing in a brand new policy, skip steps #1 and #2)

Step 1. Archive (if necessary) the previous version of the policy

You can archive a single policy at a time, or multiple policies at once.

- To archive a **single policy**, open your Working manual, and go to the policy that you want to archive.
- Click on the **Archive** button located in directly beneath the content

The screenshot displays the CU Policy PRO web application. On the left is a navigation tree under 'MANUAL ADMINISTRATION' with 'EDIT SECTIONS OF WORKING MANUAL' expanded to show a list of sections including '1615 - Privacy'. The main content area shows the 'Privacy' page with fields for 'Page Name', 'Section ID 1615', and 'Revised Date'. Below the text editor, an 'Editor Note' field is visible, and at the bottom, three buttons are present: 'Save', 'Preview', and 'Archive'. The 'Archive' button is highlighted with a red rectangular box.

Step 1. Archive (if necessary) the previous version of the policy

- To archive **multiple policies**, open the *Manual Section Management* folder, then click on the “Multi-Archive Utility”
- This brings up a form listing all the sections in your *Working Manual*, with a checkbox next to each section.
- Click on all the sections you want to place a copy to Archive
- Scroll to the end of the page and click the “Copy Section(s) To Archive” button.

Open the Multi-Archive function

End of the page

Check all policies to be archived

Scroll down

Copy Section(s) To Archive

Working | Master | Archive

Search Working Manual: [] Search

MANUAL ADMINISTRATION

EDIT SECTIONS OF WORKING MANUAL

MANUAL SECTION MANAGEMENT

Add Sections

Multi-Delete Section Utility

Multi-Delete Public Utility

Multi-Archive Utility

Multi-Add to Working From Master Utility

Auto Revise Manual Setting

Multi-Key Fields Update

MANUAL TOOLS

REPORTS

Update This Menu Tree

Storage Manuals Library Home

Multi-Archive Utility

Check the sections below and click the "Copy Section(s) To Archive" button to copy to archive sections from your manual.

Select/Deselect All Sections

1000: Administrative

1100: Leadership

1100: Leadership

1130: Credit Union Values

1140: Credit Union History

1150: Field of Membership

1160: Strategic Planning

1170: Equal Opportunity Statement

1200: Organization

1210: Compensation, Reimbursement And Indemnification

1220: Bond and Insurance Coverage

1230: Regulatory Compliance

1235: Education & Volunteer Training Guidelines

1300: Audits

1400: Legal Counsel

1500: Staffing

1510: Nepotism

1520: Succession Planning

1600: Code of Ethics

1610: Confidential Information

1615: Privacy

1616: Anti-Phishing

11003: Accuracy And Integrity Of Information Reported

11004: Pre-Screened Offers Of Credit Or Insurance

11005: Adverse Action Based On Information Contained In Consumer Report

11006: Receipt Of Notice Of Dispute Of Accuracy Information

11008: Credit Report Alerts

11009: Identity Theft Red Flag Guidelines

11010: Risk Based Pricing

11011: Disclosure Of Credit Scores

11012: Disclosure Of Information To Victims Of Identity Theft

11013: Prevention Of Re-Pollution Of Consumer Reports

11014: Reconciling Addresses

11015: Obtaining and Using Medical Information

11016: Affiliate Marketing Rules

12000: Board Policies

12100: Meeting requirements

Step 2. Remove the previous version of the policy from the Working manual

- Whether you are removing one policy or multiple policies, open the *Manual Section Management* folder, then click on the “Multi-Delete Section Utility” link
- This brings up a form listing all the sections in your *Working Manual*, with a checkbox next to each section.
- Click on all the sections you want to delete.
- Scroll to the end of the page and click the “Delete Selected Sections from Manual” button.

The screenshot shows the 'Multi-Delete Section Utility' page in the CU policy PRO system. The page title is 'Multi-Delete Section Utility' and it includes a search bar for the working manual. A left-hand navigation menu is visible, with 'Multi-Delete Section Utility' highlighted. The main content area contains a list of policy sections, each with a checkbox. Two sections are checked: '1235: Education & Volunteer Training Guidelines' and '1615: Privacy'. A red box highlights the 'Multi-Delete Section Utility' link in the navigation menu. Another red box highlights the list of sections, with a callout box stating 'Check all policies to be deleted'. A third red box highlights the 'Delete Selected Sections from Manual' button at the bottom of the page, with a callout box stating 'End of the page'. A vertical red arrow with the text 'Scroll down' is positioned to the right of the section list.

Open the “Multi-Delete Section” link

Check all policies to be deleted

End of the page

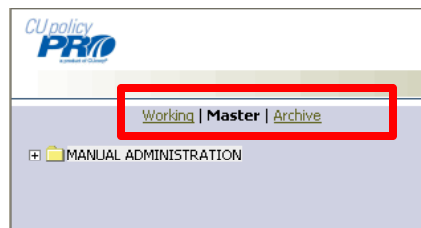
Scroll down

Delete Selected Sections from Manual

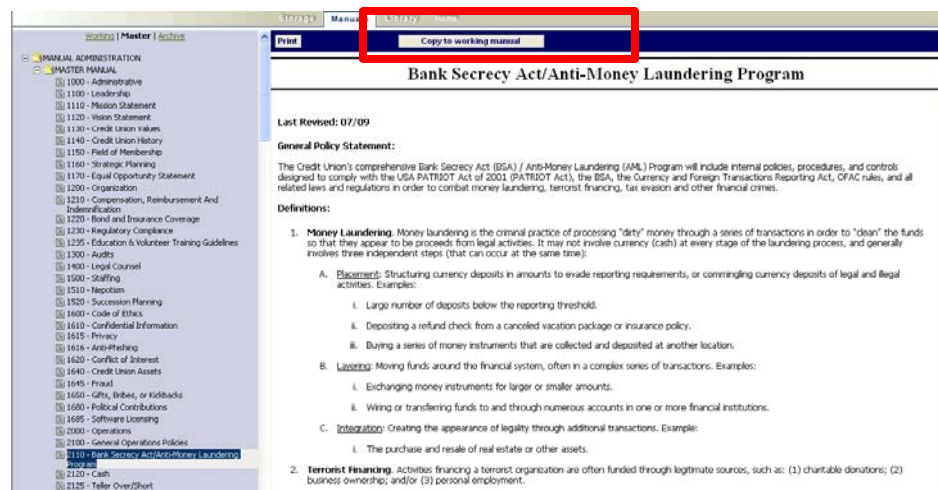
Step 3. Bring in the updated/new policy from the Master manual to the Working manual

You bring in a single policy from the Master, or multiple policies at once.

- To bring in a **single policy**, click on the “Master” link at the top of the Manual Builder area



- Locate the desired policy to add into your manual. When you click on the section the content populates on the right side. Click on the **Copy to Working Manual** button at the top of the content.



Step 3. Bring in the updated/new policy from the Master manual to the Working manual

- To bring in **multiple policies** from the Master, open the *Manual Section Management* folder, then click on the “Multi-Add to Working from Master Utility” link
- This brings up a form listing all the sections in the *Master Manual*, with a checkbox next to each section.
- Click on all the sections you want to move from the *Master* to your *Working Manual*.
- Scroll to the end of the page and click the “Add to Working from Master” button

Open the Multi-Add to Working from Master function

Check all policies to be added to working from the Master

End of the page

Scroll down

The screenshot shows the CUQuality PRO interface. The main heading is "Multi-Add to Working From Master Utility". Below the heading is a search bar and a "Select/Deselect All Sections" button. A list of manual sections is displayed, each with a checkbox. The "Multi-Add to Working From Master Utility" link in the left sidebar is highlighted. The "Add to Working from Master" button at the bottom right is also highlighted. A red box highlights the list of sections, and a red arrow points down with the text "Scroll down".

Section ID	Section Name	Selected
1000	Administrative	<input type="checkbox"/>
1100	Leadership	<input type="checkbox"/>
1110	Mission Statement	<input type="checkbox"/>
1120	Vision Statement	<input type="checkbox"/>
1130	Credit Union Values	<input type="checkbox"/>
1140	Credit Union History	<input type="checkbox"/>
1150	Field of Membership	<input type="checkbox"/>
1160	Strategic Planning	<input type="checkbox"/>
1170	Equal Opportunity Statement	<input type="checkbox"/>
1200	Organization	<input type="checkbox"/>
1210	Compensation, Reimbursement And Indemnification	<input type="checkbox"/>
1220	Bond and Insurance Coverage	<input type="checkbox"/>
1230	Regulatory Compliance	<input type="checkbox"/>
1235	Education & Volunteer Training Guidelines	<input checked="" type="checkbox"/>
1300	Audits	<input type="checkbox"/>
1400	Legal Counsel	<input type="checkbox"/>
1500	Staffing	<input type="checkbox"/>
1510	Nepotism	<input type="checkbox"/>
1520	Succession Planning	<input type="checkbox"/>
1600	Code of Ethics	<input type="checkbox"/>
1610	Confidential Information	<input type="checkbox"/>
1615	Privacy	<input checked="" type="checkbox"/>