CEO*

Onboarding Checklist

☐ ### *Notification of CEO Change*

Submit names of current and new CEO, the effective start date, contact information, and Acknowledgement from Board of Directors.

https://store.cuanswers.com/product/ceo-changes/

☐ ### *Submit your Signature Change*

If you wish for your laser printers to produce the signature(s) on your laser checks, an image must be produced on the iSeries. To produce this image, we will need a signature template for each signature that could appear. You can view the instructions and upload the template using the store link below.

https://store.cuanswers.com/product/signature-change/

☐ ### *User ID Additions and Deletions*

If you need to add a new CU*BASE User ID or delete an existing one, please fill out the Credit Union Security Authorization Request (**found on store page**) with the signature of a current Security Officer, and upload the file to the store page.

https://store.cuanswers.com/product/user-id-additions-and-deletions/

☐ ### *Security Officer Additions and Deletions*

If you need to add a new Security Officer or delete an existing one, please fill out the Credit Union Security Authorization Request (**found on store page**) with the signature of a current Security Officer, and upload the file to the store page.

https://store.cuanswers.com/product/security-officer-additions-and-deletions/

☐ ### *Upload/Download Authority Requests*

If you need to add or change the ability for a user to download or upload information to CU*BASE please fill out the iShield Security Access Request (**found on store page**) with authority needed, employee name, CU*BASE User ID, and the signature of the Security Officer, and upload the file to the store page.

https://store.cuanswers.com/product/upload-download-authority-requests/

☐ ### *CU*BASE Alerts/Client News*

By signing up for CU*BASE Alerts, your credit union has a direct line of access to all the latest and ongoing developments regarding network and server maintenance, file delays, and any connectivity interruptions or unexpected issues we may encounter. Client News is primarily focused on marketing and educational efforts, with emails that promote new and existing products, upcoming webinars, resources available on our website and more!

https://store.cuanswers.com/product/sign-up-for-cubase-alerts-client-news/

☐ ### *AnswerBook Admin Permissions*

Interested in viewing all the questions your Credit Union has asked our Client Services and Education Team? This can be activated for Management Personnel using the link below.

https://store.cuanswers.com/product/answerbook-admin-permissions/

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