

# MEMBER SERVICES EXERCISES FOR SUCCESS

*EXERCISE BOOKLET*



# EXERCISES FOR SUCCESS

## *Member Services*

Practice exercises with:



Workbook completed by: \_\_\_\_\_

Date: \_\_\_\_\_

## What is Exercises for Success?

---

**Exercises for Success** is a series of workbooks designed to provide practice exercises for credit union employees using:

- [Bedrock Community Credit Union](#)
- [Custom Training Edition \(CTE\)](#)

Each workbook is broken down into several sections:

- **Introduction to Online Resources:** This will get you familiar with the robust number of resources available to help you succeed.
- **Exercises:** Scenarios to help you master CU\*BASE.
- **Check your Knowledge:** This will help you identify areas that need work.

## Exercises for Success Workbooks

---

- Member Service
- Teller Processing
- Xpress Teller
- Lending



**Security Reminder:** Bedrock Community Credit Union is a shared resource that allows credit union employees across the network to practice using CU\*BASE. We strongly advise against using any personal or identifying information, as any information in the database is accessible to anyone using Bedrock. Additionally, since you are in a practice environment, printing has been disabled.

## Prerequisites


---

There are several online courses that are required before continuing to your exercises. Be sure to complete the corresponding courses before you move further into your workbook.

The required online courses include information on different functions in CU\*BASE. Included in some of these courses are “Show Me” videos that demonstrate how to do the activity.

Suggested courses for **ALL** credit union employees:

- **CTM 100** – Welcome to CU\*BASE Gold
- **CTM 101** – CU\*BASE Navigation
- **CTM 102** – Rate Inquiry, Loan Quoter, and the Timeout Window



Each course in Online Learning includes an exam afterwards.

Required for ***Member Services Guide***:

- **CTM 200** – Member Inquiry
- **CTM 201** – Phone Operator
- **CTM 300** – Opening Memberships & Accounts

Required for ***Teller Processing Guide***:

- **CTM 400** – Teller Processing 1
- **CTM 401** – Teller Processing 2
- **CTM 900** – e-Receipts and Photo ID Capture

Required for ***Xpress Teller Guide***:

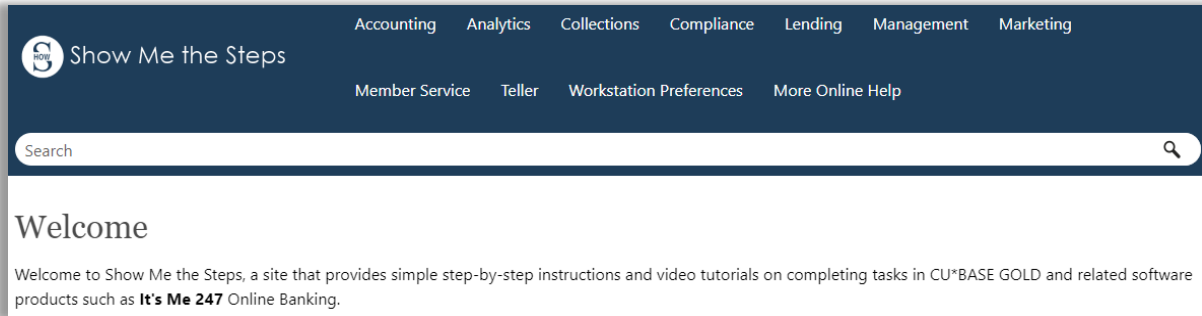
- **CXT 100** – Xpress Teller
- **CTM 900** – e-Receipts and Photo ID Capture

Required for ***Lending Guide***:

- **CLS 100** – Lending Basics
- **CLS 101** – Lending 2: Creating and Disbursing Loans for Members and Non-Members

# Show Me the Steps Online Help

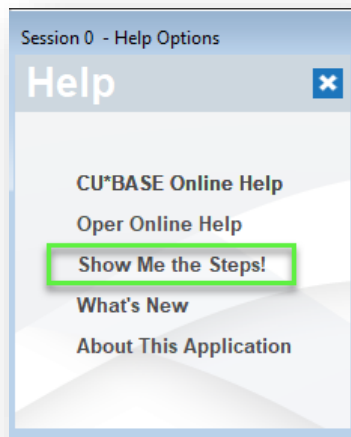
[Show Me the Steps Online Help](#) is a system with step-by-step directions that will help you navigate several tasks and activities in CU\*BASE.



## HOW TO FIND THE SHOW ME THE STEPS ONLINE HELP:



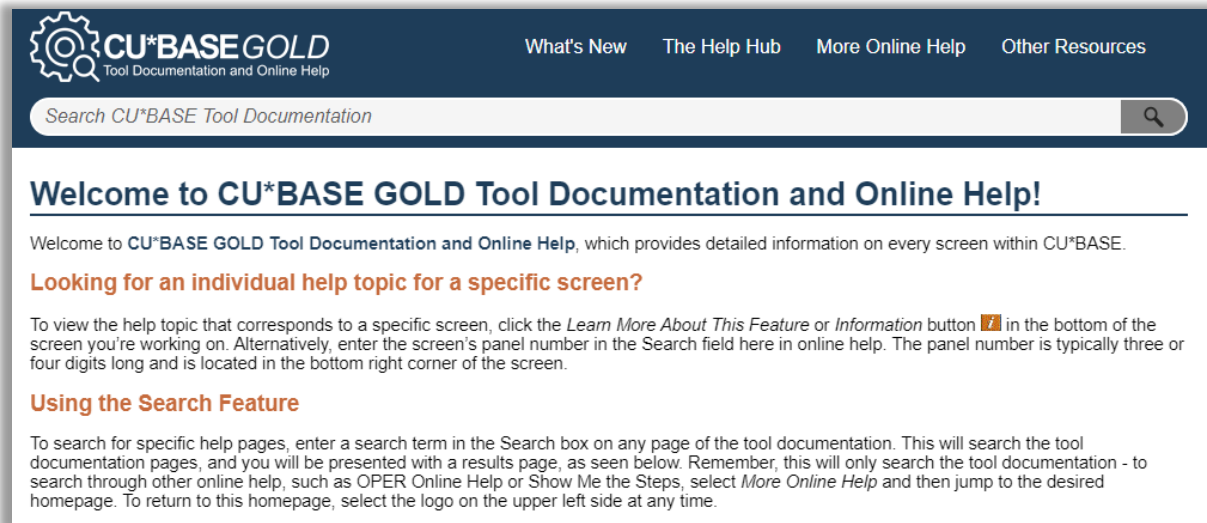
You can access this system by clicking the question mark icon, shown to the left, at the bottom of any menu screen in CU\*BASE, then selecting the **Show Me the Steps** link.



You can also find links to Show Me the Steps topics throughout the CU\*BASE Online Help on relevant topics.

# CU\*BASE Tool Documentation and Online Help

[CU\\*BASE Online Help](#) includes more detailed information about the screens you will use in CU\*BASE. Use the search feature to find the information you need.



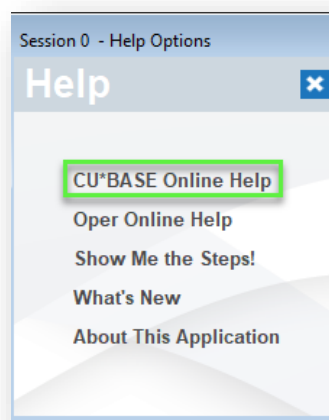
## HOW TO FIND CU\*BASE ONLINE HELP:



Click the information icon, shown to the left, at the bottom of each screen in CU\*BASE to access help for that specific screen/tool.



You can also access this system by clicking the question mark icon, shown to the left, on the bottom of the screen and then selecting the **CU\*BASE Online Help** link.



## What Do I Need?

---

You will use the Bedrock Community Credit Union or CTE to practice your exercises. Please see your manager or education coordinator for your credentials to sign on.

To complete **Exercise for Success** courses, you will first need to create two practice memberships and fund their sub accounts. You will need to:

- Create two new memberships in the Bedrock Community Credit Union or CTE.
- Open a checking account for the first membership with the second member as a Joint Owner on that account.
- Activate your teller drawer and deposit \$1,000.00 cash into each sub account, including the base (000) share account.

Directions on creating memberships, opening checking accounts, activating the teller drawer, depositing funds – all of this is available in the [Show Me the Steps online help](#).

## Use Show Me the Steps to Get Started!

---

Navigate to Show Me the Steps, or simply [click here](#).

Use the search feature to search the following keywords, or click the links below:

- [Open Membership](#)
- [Open Additional Savings or Checking Account](#)
- [Add Joint Owner to an Account](#)
- [Activate Teller Drawer](#)
- [Make a Cash Deposit](#)

## My Accounts

---

List your practice membership accounts below:

<b>Account #1:</b>	
<b>Member Name:</b>	
<b>Account #2:</b>	
<b>Member Name:</b>	



# Member Services Exercises

## Activity 1: Updating Contact Information for a Member

Activity: Use Inquiry (F1)	Show Your Work:
1. The member notified you of their recent <i>address change</i> .	
2. The member's <i>license number</i> has changed.	
3. The member wishes to use a <i>Code Word</i> now and has requested that one be added to their account.	
4. The member plans to stay in their summer home each year between June 15 <sup>th</sup> through August 10 <sup>th</sup> and requested that all communication be delivered to this <i>alternate address</i> .	
5. The credit union received return mail and needs to flag the primary address as a <i>wrong address</i> .	

## Activity 2: Transferring Funds for a Member

Activity: Use Phone Operator (F2)	Show Your Work:
1. With the same membership, transfer \$25.00 from savings to checking.	
2. From another membership, transfer \$10.00 into your primary member's checking account. Be sure to use the <i>Verify Member</i> button as it appears to properly identify the account holder information.	
3. Transfer \$50.00 from the checking into the savings with a secondary transaction description of "Vacation Money." ( <i>This will appear in online banking and on the member's statement.</i> )	

## Activity 3: Transaction Research Functions

Activity: Use Phone Operator (F2)	Show Your Work:
1. Identify the <i>average daily balance</i> of the member's savings account for the last 60 days.	
2. In addition, confirm the <i>average daily balance</i> of the checking account for the last 60 days.	
3. The member wants you to print a Verification of Deposit form for this account.	
4. Print a <i>Transaction History Report</i> listing the transactions processed in the last seven days.	
5. Repeat Steps one through four for your secondary membership.	

## Activity 4: Cleared Checks and Stop Pays

Activity: Use Phone Operator (F2)	Show Your Work:
1. The member has written a check (check #2202) with the amount of \$300.00. The member first wants to know if it has cleared, and if it hasn't, the member wants to place a stop pay on the check.	
2. The same member calls back and says there was a mix up. The check number the member wants the stop pay on is not check #2202. It is check #2203.	
3. Your second member calls to place a stop pay on check #8978.	
4. Your second member calls the credit union back. Now the member has lost the last four checks (#1513 – #1516) and wants to place stop pays placed on all of them.	

## Activity 5: Member Comments

Activity: <i>Use Phone Operator (F2)</i>	Show Your Work:
1. The member reported a lost wallet and requested an extra layer of verification when conducting business with the credit union.	
2. When you return to the Inquiry screen, what color is the exclamation point on the <i>Comments (F1)</i> button?	
3. The same member returns to the credit union with confirmation that they have found the wallet.	
4. The same member is concerned that their identify may have been compromised. Enter a permanent comment with a reminder to always check the ID of this member.	
5. The member notified the credit union about upcoming travel and plans to return to town in 45 days.	

# Check Your Knowledge!

**You're getting closer now! Let's see what you've learned while working on your *Exercises for Success: Member Services*.**

Answer the following questions on the material you just learned – and try to answer *without using your notes* (You may use CU\*BASE). This is your opportunity to check and make sure you are now skilled at all the material covered in this workbook. Good Luck!

Can You Answer the Following?	
1. Why would you use the Verify Member (F1) button when transferring funds between two memberships? What information can you view using this button?	Yes No
2. How do you print a Transaction History report for the last month for a member's checking account? What option or button do you use?	Yes No
3. How do you transfer \$45.00 from your one member's savings account to the same member's checking account using Phone Operator? What option or button do you use?	Yes No
4. How can you tell if the member you are assisting has an email address and license number recorded in the system? Where do you look for the email address? How do you add one if one is not recorded in the system?	Yes No
5. How do you determine if check #445 for the amount of \$42.00 has cleared? Which option or button do you use?	Yes No
6. How do you create a stop pay for this check mentioned in the previous question? What option or button do you use?	Yes No

<b>Can You Answer the Following?</b>	
7. The member calls back to change the check amount and check number, this time with no amount known. Where do you make these changes?	Yes No
8. How do you transfer \$50.00 from your one member's checking account to a second member's checking account? Which option or button do you use?	Yes No
9. During the transfer how do you check the license number of the member making the transfer? How can you add a secondary transaction description of "present for birthday," making sure that this description does not appear on the statement of the person having the birthday?	Yes No
10. How can you tell what the average balance for the last 60 days of one of a member's checking accounts is? How do you print a Verification of Deposit form for this member? Which option or button do you use?	Yes No
11. How do you add a comment that the member has lost his/her wallet to alert other employees that they should ask for this member's identification? Which option or button do you use? How do you make this comment permanent?	Yes No
12. How do you make the comment created above permanent? How do you add a second comment to a membership?	Yes No
13. How do you place a stop pay to the second member's membership for a range of checks (check #3309-#3312)?	Yes No

# Additional Exercises



Question:	Answer:
How do you access the screen to change a member's personal information? Which option or button do you use?	
A member has recently married and changed their last name. How do you record this change in the system?	
The member does not have an email address but is glad to share it when asked. How can you enter their email address in the system?	
How can you tell that a member lives in Florida for part of the year? What indicator on the screen do you look for?	
Where do you find the license number of the member? How about the member's mother's maiden name?	
Where do you look to find the Code Word for the member?	
The spouse of a member comes into the credit union. How can you confirm that they are a joint owner of the membership?	
How do you make a transfer between sub accounts of the same membership using Phone Operator? Which option or button do you use?	



What is the same and what is different when you transfer funds between two memberships? Which option or button do you use?	
A member you do not know calls your credit union to make a transfer. How can you verify the identity of this member who is not present to show you their license?	
How do you add a secondary transaction description to remind the person making the transfer what the transfer is for? How do you make sure that the person receiving the transfer does not also see this description on his statement?	
How do you determine the Average Daily Balance of an account? Which option or button do you use?	
How do you print a Verification of Deposit form? Which option or button do you use?	
How do you print a Transaction History Report? Which option or button do you use?	
Can you print a Transaction History Report for more than one sub account without re-entering the screen used to print one?	
How can you tell if a check has cleared? Which option or button do you use? Which sub account do you use?	
How do you add a stop pay for a check? Which option or button do you use? Which sub account do you use?	

When adding a stop pay, do you need to enter the amount if you know the check number?	
What happens if you add both the check number and dollar amount to the stop pay?	
How do you alert other employees to watch for the check for the stop pay (add a comment)?	
How do you add a stop pay on a range of checks?	
At what point, when entering a member's account, do you view the comment text?	
How do you add a comment for other employees to view when they assist a member? Which option or button do you use?	
How do you update the comment's text when more information is available?	
When does the Comments (F1) button exclamation point color change? What do the different colors indicate?	
How do you add a comment so that it is permanently retained by the system?	
How do you add a comment to a membership when the membership already has a comment?	

# Conclusion

This concludes the **Exercises for Success: Member Services** workbook. Hooray, you did great!

If you feel there were areas of this workbook where you may need more practice, add some notes below and notify your trainer.

### What areas or topics would you like to explore further?

--