## CU\*Forms Update Coming March 24<sup>th</sup>, 2024

On March 24<sup>th</sup>, 2024, there will be a new version of the CU\*Forms giving your credit union a new set of features:

- Search for members not only by account number but SSN and full name.
  - In CU\*Forms, click on the button.

Account Number			
elect the account number you we	ould like to use to populate these f	forms.	
✓ Account Card	Member Forms		
Account Base			Pull Account Data
			-

• Change your search criteria by Account, SSN, or Name.



- Add reference or a signing document to your CU\*Forms signing process.
  - When selecting forms form creation, click the **Add Document** button below the chosen forms to upload a document you would like to include with the signing event.

Choose Your F	orms			Forms Chosen	
Search for templat	Es via a form gro	up or using a key	word.	Continue on to choosing an account	t number when you have all
Form Group		Search using key	word	your forms chosen. Click and drag f	orms to determine the signing
All	v	Enter Keyword		un de la	
				✓ Account Card	Member Forms
(Done) Loan Ap	plication		Loans Forms	Add Do	cument
(Done) Subsequ	ent Action - MX	E064-E	Loans Forms		
(Needs Work) Lo	an Credit Card A	pplication (INA	Loans Forms		Continue 🔊
(Needs Work) Lo	an_Application (	INACTIVE)	Loans Forms		
(Needs Work) Lo	an_Security_Agr	eements_Note (I	Loans Forms		
(Needs Work) Se	curity Agreemer	ıt - Sari (INACTI	Loans Forms		
500 SD Hold			Five Star		
A2A Agreement	Authorization (I	NACTIVE) Acc	ounting Forms		
A2A-Disclosure	1	Acc	ounting Forms		
A2A-Disclosure	2	Acc	ounting Forms		
Account Card		S.A.	Aember Forms		
Account Receipt	(INACTIVE)		Five Star		
ACH Authorizati	on Form - Month	nly Payments (INA	CTI Five Star		
1011 as Dash Ha	a sharing factor	Free ONLACTOR	1000		

 In the Upload document panel, select the document you would like to upload, add a document name, and tell the document where it needs to be archived. The document will inherit indexes of other documents saved.

Upload Doo	cument	
Choose File	Test Document.pdf	
IRA Form		
Member_For	ms	~
		Cancel Upload

• On the document signing screen, easily add signing fields for manually filling or send them to the member for eSign. Simply click the + Add Field or right-click and draw where you want to draw a box.

Back	Send to Member = Edit Indexes + Add Field Representation Print Let E-Sign Representation Send to Member = Edit Indexes + Add Field Representation Print Let E-Sign Representatio Print Let E-Sign Representation Print Let
	Demo Company
	Authorization Agreement
6	I hereby authorize Demo Company to initiate automatic deposits to my account at the financial institution named below. I also authorize Demo Company to make withdrawals from this account in the event that a credit entry is made in error.
	Further, I agree not to hold Demo Company responsible for any delay or loss of funds due to incorrect or incomplete information supplied by me or by my financial institution or due to an error on the part of my financial institution in depositing funds to my account.
	Credit Union Account Information
7	Member's CU Account Number:
	Member's Name:
	Member's SSN:
	Member's Phone Number:
	Financial Institution Information
8	Name of Financial Institution: Financial Institution 1
	Routing Number:   C Checking
	Account Number: 🖸 Savings
	Signature
9	Authorized Signature (Primary): Date:
	Authorized Signature (Joint): Date:
	Required Fields

If you are adding a box with + Add Field, move it to the location, and double click on the to access settings. Change the field type to be your desired field like text or signature box. If you would like the member to sign in eSign, check the "Send for eSign" box.

Edit Field		>
Field Name:	field_71AF_86	
Field Type:	Text	~
Signer:		~
eSign		
Send for eSign:		
Required for eSign:		
Delete Field		Cancel Save

- Request a document at the same time while sending CU\*Forms out for eSign.
  - Once you are finished filling your form and ready to send it for eSign, click on the

Request a Document 
button to initiate the request from the signer. It is possible to have multiple requests from multiple signers.

- Signer Select the signer that needs to submit the document
- Archive Table where to save the document
- Document name name of the document in the archive
- Request Text helps the member know what document to upload.

eSig	n Confirmation						2
Packa	age Name						
Joh	in Doe, JR 2024-03-13 10:	42 AM			Loc	k Signature Names	
	Name		Email		Notificati	on Type	Auth Code
	John Doe		johndoe@e	uhndoe@email.com		v	761012
Real	liested Documents						
Sign	ier	Archive Table		Document Name		Request Text	
Sign	nn Doe v	Archive Table Member_Form	15 4	Document Name		Request Text Please upload your Photo ID.	Thanks!
Sign	in Doe v	Archive Table	15 V	Document Name Photo ID Request a Documen	0	Request Text Please upload your Photo ID.	Thanks: