CU*Answers Management Services

Consulting and Custom Training

ONLINE AND ON-SITE CATALOG

June 2024

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Welcome to the CMS Consulting and Custom Training Catalog

This catalog offers a variety of options for expert assistance from our teams to yours. We aim to tailor these training and consulting opportunities specific to your needs, specific to your organization, and for best practice recommendations based on your unique credit union situation.

→ **See general learning and product training in the Education Catalog**

Using this catalog, you can put together a custom engagement across different areas of your credit union's operations or generate a plan tailored to a single area of focus. The selections available in this guide range from a single remote session lasting as little as 30 minutes on a specific topic, to a multiple day on-site event with a mix of consulting and training, and anything in between; you decide what's right for your needs.

The following questions are real situations from our credit unions and are good starting points to consider when determining where you may need to explore beyond our standard training and use this catalog for additional engagements with our teams.

Is Custom Training and Consulting the Right Choice?

Situation	Standard Free Training	Custom Paid Consulting/Training
"My expert just walked out the door (or retired). I have new team members that need training in this area of my operations."	Resources include all the online and in-person course offerings in our Education Catalog, our online help systems, and special resources in the Help Hub.	Only if you want to take this as an opportunity to adjust the process that is in use or are questioning if your configuration could benefit from a refresh.
"It's been a while since we converted. I want to know if I'm getting the most out of the system. I don't know what I don't know."	N/A	This is a classic tune-up engagement which can be done for a part or perhaps multiple areas of the system. Use this catalog to select the areas that apply!
"Are there products I should be budgeting for or taking advantage of?"	N/A	This is a perfect opportunity for consulting with our experts! Start with our FREE checkup series from the various brands.
"Is there a way to do _____?"	Call the Client Services & Education team for available standard training on the system and its capability.	If there isn't a standard offering that's just right, engage our consultants to discuss the business behind why you need to do _____ in the first place and if there is another, better way.
"Releases come out, but I don't always have time to digest the release notes. How do I know if there are important things in the release for my particular credit union's situation?"	Attend the release trainings and use the notes to determine what's important to your credit union.	Don't have time to read the notes and internalize them to your credit union? Then **Strategic Release Management** may be right for you.

⟶ Not sure how to assess your needs before using this catalog? We can help with that too, working with you to develop a tailored training plan with the **FREE Help Me Decide!** consulting session (see page 7 for more information).

Pricing and Details

Each engagement opportunity in this catalog is listed by CMS team, and includes the following information,

Short Description | This is a brief description of what the engagement is all about what is covered and some of the benefits. It is NOT an all-inclusive description; remember that courses can be tailored specifically for your credit union needs, so it's intended as a starting point. **Just remember that if courses need to be tailored, duration and costs could likewise change.**

Consulting or Custom Training | Consulting engagements involve making recommendations, reviewing configurations, and optimizing product usage. Custom training engagements involve teaching staff how to complete tasks, set up successful routines, and use the tools and processes in CU*BASE.

Designed for | This is a description of who would benefit from participating in the engagement.

Pricing | Unless specifically noted, the standard cost for both online and on-site arrangements, either custom training or consulting, is billed at $100/hr.

Additional cost structure for on-site arrangements

Minimum of **6 hours** of selected engagements within a specific team are required to book an on-site visit, unless specifically noted in the pricing. On-site visits are billed to include,

Base cost of engagement at $100/hr
+ $500/per day on-site fee
+ T&E costs, variable per engagement

Fee-Free Check Ups

Sign up for our FREE Check Up Bundle!

When you order this in the store, we will schedule you with all our specialized teams to do a Free Check up! Learn what they can do to help you make the most of the tools in their area of expertise, what's on the shelf today that you maybe aren't leveraging but could be, any educational opportunities, and what we're working on next. See the top entry for the free check up, and order the all-team bundle here!

See additional bundles and training packages on page 64

Consultations and Custom Training Engagements

Now for the exciting part! We hope you enjoy reviewing our custom training and consultation opportunities. Our teams want to see you succeed and thrive as part of our CUSO, and we are thrilled to help you along your journey.

Asterisk Intelligence
Shop | Learn | Connect

Imaging Solutions
Shop | Learn | Connect

AuditLink
Shop | Learn | Connect

IRSC
Shop | Learn | Connect

BizLink
Shop | Learn | Connect

Lender*VP
Shop | Learn | Connect

Earnings Edge and Accounting Services
Shop | Learn | Connect

Cards & Payments
Shop | Learn | Connect

CU*Answers Management Services

CU*Answers Management Services is a group of branded services whose leaders focus on addressing issues regarding users, strategy, and development. Our value proposition focuses on the main intention of connecting people to projects and to the organization with the overlying objective of partnership that encompasses everything we do. CU*Answers Management Services aligns our objectives with your strategic plan defining what it means to have an active partnership invested is a mutual success.

Help Me Decide!

Short Description	This special engagement is for credit unions that know they need some dedicated assistance but when looking at this catalog just aren't quite sure what applies to them.
	When you sign up for this session, we'll meet with you can discuss what challenges you're facing and/or what you're looking to accomplish, and then recommend what we believe will get the job done for you and why! From there you can order any or all the recommended engagements.
Duration	30-60 minutes
Consulting or Custom Training	Consulting
Designed for	Credit Union managers struggling with identifying which engagements would be beneficial to them to address their specific situations.
Pricing	**FREE!** *Online Only*
Visit the Store	https://store.cuanswers.com/product/help-me-decide-on-custom-engagement/

Getting the Most Out of Your CU*BASE Configurations

Short Description	This service will help you get the most out of what CU*BASE has to offer, ensuring you are processing consistently with what your disclosures and marketing state, and optimizing your full income potential using CU*BASE tools.
	This session is an intensive review of your CU*BASE configurations, very much like the management configuration session that you did during your conversion, but better since you know much more today than you did back then.
	This session will be broken down in several sections:

	The Earnings Edge team will work with you on reviewing:
	• General Configurations • CU*BASE Savings/Checking Product Configurations • CU*BASE Certificate Product Configurations The Lender*VP team will work with you on reviewing: • Loan Category Configurations • Loan Product Configurations • Request to Disbursement Workflows • Collection Parameter Configurations • Delinquency Notice Configurations • Loan Fine Configurations
Duration	2 Days
Consulting or Custom Training	Consulting
Designed for	Credit unions who would like to review their configurations in CU*BASE and determine if they are still in sync with disclosures. Or credit unions who want to know if the decisions made during conversion still serve you for who you are today.
Pricing	$2,000 *On-Site Only*
Visit the Store	https://store.cuanswers.com/product/getting-the-most-out-of-your-cubase-configurations/

The Asterisk Intelligence team brings you a team of analysts who work to interpret your data for insights and opportunity. Tools like Analytics Booth, Report Builder (Query), Dashboards, and Unique Data Management (UDM) give the power to see and control your database. Then we work with you to maximize the benefit of these solutions in the context of our five pillars of data analytics – Finance, Operations, Fraud, Audience, & Marketing. Partner with Asterisk Intelligence to harness the power of your data with business intelligence and database management!

Asterisk Intelligence

Asterisk Intelligence Free Check Up!

Short Description	This engagement is for credit unions that may or may not be leveraging Analytics Booth, CU*BASE Dashboards, Custom Fields/UDM, CU*BASE Queries/Automation, CU*BASE Data Warehouses, and additional data resources within our network. We will review with you each one of these strategies and why they should be important to you. What we'll review: • Do you have a data analyst on staff? If not, who do you go to for your data needs? • Are you using Analytics Booth? • Do you have any data warehouse needs? If so, we can help strategize alongside your goals. • What are your favorite CU*BASE dashboards? Don't have any? We'll help you pick some. • Where are you gathering information for your board packet today? • Upcoming enhancements, and projects that impact the world of data. • Upcoming training events that you your team may be interested in attending. We'll make recommendations for products or engagements in this catalog that may be beneficial to help you achieve your goals!
Duration	30 minutes
Consulting or Custom Training	Consulting
Designed for	Credit Unions that want to get the most out of what is available or to leverage their existing toolset to do more!
Pricing	**FREE!** *Online Only*
Visit the Store	https://store.cuanswers.com/product/asterisk-intelligence-free-check-up/

Mentor Me in Data Strategies or Skills

Short Description	In this engagement we offer and dedicate a regular time for focused guidance at any level – total beginner on day 1 of your career at the credit union, to established data analyst who has seen years of time on various platforms and projects. We'll start by connecting to understand your current skills needs, project goals, data best practices, operational data questions, and more. Then we'll schedule recurring meetings and collaboratively establish a tentative agenda for each meeting. The time is yours and extremely flexible to meet your specific needs; combine any mix of trainings, problem-solving, or tuning your data tasks.
Duration	**OPTION A -** 3 months online at 120 minutes per month (two 60-minute sessions each month) **OPTION B -** 6 months online at 60 minutes per month (one 60-minute session each month)
Consulting or Custom Training	Variable
Designed for	Roles that focus on data or emphasize data.
Pricing	**OPTION A -** $200/month. Total $600 **OPTION B -** $100/month. Total $600
Visit the Store	https://store.cuanswers.com/product/mentor-me-in-data-strategies-or-skills/

Tune-Up: Automated Queries

Short Description	In this engagement the Asterisk Intelligence team will review any currently automated queries, and any list of non-automated queries that you wish to set up within the automation scheduler. The Asterisk Intelligence team will present the current inventory of your automated queries, areas of weakness or in need of troubleshooting, and recommendations to resolve or improve both queries and procedure. Scope of recommendations typically includes: • Non-automated queries that could benefit from being automated. • Adjustments to query settings or automation configurations. • Procedural changes as needed for managing automated queries in future.
Duration	60 minutes
Consulting or Custom Training	Consulting
Designed for	Those who either create (occasionally or regularly) or regularly process custom queries.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/tune-up-automated-queries/

Train My New Data Specialist(s)

Short Description	In this engagement we offer a schedule of trainings to introduce your credit unions data (how and where it's stored), how to access it, the toolkits that support data strategies (analysis, reporting, management), and resources to pursue continued learning beyond the scope of this initial engagement. Data specialists can be in roles dedicated to data analysis or data management, or they can be folks who are taking on another "hat" of learning data in addition to their main role at the credit union today. Topics and trainings from this engagement will serve as a solid foundation for any data specialist to build upon as they settle into their new duties.
Duration	**OPTION A** - 8 weeks online, at 60 minutes per week **OPTION B** - 3 months online at 120 minutes per month *(two 60-minute sessions each month)* **OPTION C** - 6 hours on-site at your credit union during a single scheduled day
Consulting or Custom Training	Custom Training
Designed for	Staff who are newly assigned the duties or role of becoming the data expert at the credit union.
Pricing	**OPTION A** - $800 online **OPTION B** - $600 online **OPTION C** - $600 on-site *see cost structure for on-site engagements*
Visit the Store	https://store.cuanswers.com/product/train-my-new-data-specialists/

CU*BASE Report Builder: Fundamentals

Short Description	CU*BASE offers a great number of dashboards and reports that are vital to checking the pulse of your credit union and growing your business. However, there may not be a single tool that meets your specific strategic goal or business need; that is where CU*BASE Report Builder can help. Nearly 800 data tables define your credit union and your members, and it is all available to a trained user. Learn how to navigate the database to find your needle in a haystack, build a simple CU*BASE query, and generate a static report or actionable database file. This module will serve as the foundation for your query skills.
Duration	90 minutes
Consulting or Custom Training	Custom Training
Designed for	Data Analysts, Accounting Staff, IT Professionals, Executives
Pricing	$150 *Online Only*
Visit the Store	https://store.cuanswers.com/product/cubase-report-builder-fundamentals/

CU*BASE Report Builder: Next Steps

Short Description	Expand on the skills your learned in the **CU*BASE Report Builder: Fundamentals** course and grow in your role as a data analyst. This course will focus on joining multiple CU*BASE files and constructing a multi-step CU*BASE query. Here, we will explore some of the more advanced functions of CU*BASE Report Builder, including custom fields, dynamic data fields, generating summary statistics, and eliminating troublesome duplicates. This intermediate-level training will leave you feeling more confident in your ability to fulfill your credit union's reporting needs.
Duration	90 minutes
Consulting or Custom Training	Custom Training
Designed for	Data Analysts, Accounting Staff, IT Professionals, Executives
Pricing	$150 *Online Only*
Visit the Store	https://store.cuanswers.com/product/cubase-report-builder-next-steps/

CU*BASE Report Builder Workshop: Become a Power User

Short Description	Master your skills with CU*BASE Report Builder and become the query expert at your credit union. String together multiple custom files to generate something truly unique and improve your operational efficiency through process automation. The first half of this course will revisit and expand on the principles learned in **CU*BASE Report Builder: Fundamentals** and **CU*BASE Report Builder: Next Steps.** The latter half will be a working engagement and will focus on your specific business and reporting needs and building custom reports to accomplish those goals. This hybrid training-workshop is designed to leverage the skills you've already developed to become more confident in your role as the credit union data expert.
Duration	We offer two options for handling the logistics of scheduling training into your day. Either option can be set up for consecutive dates or split in any combination of dates. All training dates are expected to be completed within a 2-week period. Either option is the same cost. • One 6-Hour Session On-Site or Online, Two 1-Hour Follow-Up Sessions Online • Two 3-Hour Sessions Online, Two 1-Hour Follow-Up Sessions Online
Consulting or Custom Training	Custom Training
Designed for	Data Analysts, IT Professionals
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/cubase-report-builder-workshop-become-a-power-user/

Implementing Your Unique Data Management (UDM) Strategy with Custom Fields

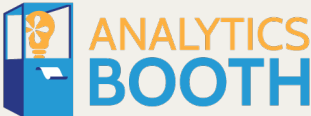|	
Short Description	Asterisk Intelligence will work with you to expand your tracking and reporting capabilities by utilizing the Unique Data Management (UDM) toolkit in CU*BASE. We will work with the credit union management team to identify member and account data that are not currently being stored in CU*BASE. In addition to creating member-level and account-level custom fields, we will train your staff on using the Self-Directed Data Flood toolkit to mass update these custom fields with data that are tracked manually or provided by a 3rd party. You will also receive assistance with merging these custom data fields with your new or existing custom reports using CU*BASE Report Builder.
Duration	Two 2-Hour Sessions Online or On-Site, 1-Hour Follow-Up Session Online
Consulting or Custom Training	Consulting
Designed for	Data Analysts and Management
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/implementing-your-unique-data-management-udm-strategy-with-custom-fields/

CU*BASE Report Builder: Comprehensive Training (A-to-Z)

Short Description	This course is designed to cover the key concepts involved in locating and working with CU*BASE data. Approximately 60% of time spent in this training event will teach the full purpose and function of each element of the CU*BASE Report Builder (Query) tool, including the more advanced features and strategies such as Custom Fields, summarizing a data set, and constructing string queries. The other 40% is spent learning a foundational understanding of the rules and best practices for working with CU*BASE data – where to find it, how to read it, and how to treat it within the Query tool.
Duration	• Two 7-Hour Sessions On-Site or Online (Recommend On-Site) • Four 3-Hour Sessions Online
Consulting or Custom Training	Custom Training
Designed for	Data Analysts, Accounting Staff, IT Professionals, Executives
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/cubase-report-builder-comprehensive-training-a-to-z/

Visualizing Report Results

Short Description	This introductory course will focus on visualizing your data both within CU*BASE and outside.
	Learn more about the Visual Analytics Tools (VAT) in CU*BASE, as well as the Common Bonds engine, which is designed to help you know your members on a deeper level. Quick export a file from one of many CU*BASE Dashboard and Reports or apply your query skills to build a custom file and feed that file into our powerful toolkit.
	We will also demonstrate how to export data from CU*BASE and visualize the results with Excel, including the use of basic PivotTables.
Duration	90 minutes
Consulting or Custom Training	Custom Training
Designed for	Data Analysts, Accounting Staff, IT Professionals, Executives
Pricing	$150 *Online Only*
Visit the Store	https://store.cuanswers.com/product/visualizing-report-results/

Understanding Your Credit Union with Analytics Booth

Short Description	Analytics Booth is a powerful tool developed by Asterisk Intelligence to simplify your reporting and visualize your historical data. Get started with Analytics Booth (*additional costs apply*) by learning about some of the basic administrator functions and get access to your credit union history at your fingertips. This course will focus on analyzing and visualizing trends in delinquencies, account balances, membership growth, and more! The Analytics Booth Dashboards provide easy access to your lending and deposit portfolios, as well as your historical income and expenses. Once you've learned the basics, you can even have intelligent alerts sent directly to your inbox to keep you apprised of your credit union performance. Stay tuned as we continue to grow Analytics Booth with one thing in mind: the success of our credit unions.
Duration	60 minutes
Consulting or Custom Training	Custom Training
Designed for	Any data-curious employee at the credit union!
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/understanding-your-credit-union-with-analytics-booth/

Analyzing Your… Fee Income

Short Description	Amongst the credit union community, the current (and future) state of fee income has been a recurring topic. This training opportunity will give you all the tools necessary to analyze your fee income in CU*BASE. Starting with the storage and retention of fee and transaction data, we will provide you with a roadmap to studying the history of fees at your credit union. This will include a high-level overview for several fee-focused CU*BASE reports and dashboards.
Duration	60 minutes
Consulting or Custom Training	Custom Training
Designed for	Any data curious employee at the credit union!
Pricing	$100 *Online Only*
Visit the Store	https://store.cuanswers.com/product/analyzing-your-fee-income/

Analyzing Your… Loan Portfolio

Short Description	A strong lending portfolio is the backbone of most healthy financial institutions and CU*BASE offers many resources for analyzing these data. This course will focus on the storage and retention of lending data and accessing these data with CU*BASE Report Builder, as well as a detailed overview of several lending-focused dashboards and reports: from your loan application pipeline to your interest income to your delinquencies and more! This crash course will give you all the tools necessary to analyze your existing loan portfolio and continue to foster growth.
Duration	120 minutes
Consulting or Custom Training	Custom Training
Designed for	Any data curious employee at the credit union!
Pricing	$200 *Online Only*
Visit the Store	https://store.cuanswers.com/product/analyzing-your-loan-portfolio/

Analyzing Your… Savings Portfolio

Short Description	This course will serve as an introduction to the storage and retention of savings portfolio data in CU*BASE. We will take a deep dive into several CU*BASE reports and dashboards that allow you to track your dividend expenses and savings balances, as well as identifying areas for growth. Asterisk Intelligence will help you explore the tools required to monitor your member deposits and financial interaction with the credit union.
Duration	90 minutes
Consulting or Custom Training	Custom Training
Designed for	Any data curious employee at the credit union!
Pricing	$150 *Online Only*
Visit the Store	https://store.cuanswers.com/product/analyzing-your-savings-portfolio/

Analyzing Your… Plastics Portfolio and Transactions

Short Description	This broad training session will focus on a variety of topics, but the primary focus will be on ways your members are using their debit and credit cards. We will review several CU*BASE reports and dashboards focused on member transactions, contingent liability, and more, as well as the storage and retention of a member's card and transaction data. Leverage the software to better understand how your members interact with their credit union.
Duration	120 minutes
Consulting or Custom Training	Custom Training
Designed for	Any data curious employee at the credit union!
Pricing	$200 *Online Only*
Visit the Store	https://store.cuanswers.com/product/analyzing-your-plastics-portfolio-and-transactions/

AuditLink
CU*ANSWERS Management Services

Credit unions have enough to keep them busy without being burdened with added work imposed by regulations and compliance. That's where we come in. AuditLink has built collaborative services for completing the work that credit union clients can't afford to do on their own. Such as concentration risk evaluations, daily log management, compliance reviews and BSA and ACH annual audits.

AuditLink

AuditLink Free Check Up!

Short Description	This engagement is for credit unions that may or may not be leveraging audit and compliance tools within CU*BASE. These tools use native data rather than a file transfer to a 3rd party to help improve workflow and reduce risk. We'll review with you and your team different tool sets and reports to see if you're taking advantage of all CU*BASE has to offer in this area. We'll review: • Your current workflow with respect to BSA and Abnormal Activity compliance. • Any areas of improvement or pain points you or your team may have with your current BSA/AML workflow. • Existing strategies and suggestions on tools that can help your BSA/AML workflow! • We'll make recommendations for products or engagements that may help alleviate the regulatory burden credit unions face day to day. • Upcoming educational opportunities such as webinars, trainings, Conversations On... events.
Duration	30 minutes
Consulting or Custom Training	Consulting
Designed for	Credit unions that want to improve workflow in the arena of compliance.
Pricing	**FREE!** *Online Only*
Visit the Store	https://store.cuanswers.com/product/auditlink-free-check-up/

Using Tools in CU*BASE to Maximize Your BSA Compliance

Short Description	AuditLink will help review and make suggestions to how you implement your BSA policy with CU*BASE. This will include helping round out your BSA policy by discussing tools in CU*BASE that can help you accomplish a streamlined workflow to help mitigate further time engagement by employees while relieving the regulatory burden. Starting with understanding your current workflow, we can determine gaps in the program and begin making suggestions of how tools in CU*BASE, and potentially a partnership with AuditLink, can help accomplish your credit union's goals.
Duration	60 minutes
Consulting or Custom Training	Custom Training & Consulting
Designed for	This engagement is designed for those wanting to get the most out of their tool set in CU*BASE regarding the Bank Secrecy Act.
Pricing	$100 *Online Only*
Visit the Store	https://store.cuanswers.com/product/using-tools-in-cubase-to-maximize-your-bsa-compliance/

Train My New BSA Officer

Short Description	Do you have a new individual stepping up to complete Bank Secrecy Act tasks? In this engagement AuditLink will work with your new BSA officer to train them on the tools they can utilize within CU*BASE to accomplish these regulatory tasks. As Auditlink are not just educators but practitioners they can discuss best practices on reviewing accounts, proper trackers, continued due diligence, and how to pull information for examiners. With this training AuditLink can assist in getting your new BSA officer up to speed and confident in completing their new duties.
Duration	60 minutes
Consulting or Custom Training	Custom Training
Designed for	Staff who are new to CU*BASE's compliance toolkit.
Pricing	$100 *Online Only*
Visit the Store	https://store.cuanswers.com/product/train-my-new-bsa-officer/

How to Configure Abnormal Activity Patterns

Short Description	Abnormal Activity Patterns are an excellent way to uncover anomalous activity within your membership base. The first step is configuring the patterns, and knowing where to begin can be overwhelming. In this engagement an experienced AuditLink representative will work with your team to look at your credit union's analytics and how using this information we can begin to build out your Abnormal Pattern configurations as well as documenting the process.
Duration	90 minutes
Consulting or Custom Training	Custom Training
Designed for	Compliance Staff
Pricing	$150 *Online Only*
Visit the Store	https://store.cuanswers.com/product/how-to-configure-abnormal-activity-patterns/

BIZ LINK

The BizLink team is your credit union's resource for everything related to Business Member Programs. Our consulting related to credit union business member programs focuses on three distinct channels:

- Business services and savings portfolio configurations and consulting
- Business lending portfolio configurations and consulting
- Business member program partner integration management and consulting

BizLink Integrated Business Solutions

BizLink Free Check Up!

Short Description	This engagement is for credit unions that may or may not be leveraging the most out of the CU*BASE configurations and tools that are popular with business/commercial members! We will spend time discussing **BizLink 247** (Business Online Banking), Biz Watch for ACH (ACH Positive Pay), hiding the 000/Regular Share account for select membership designations, the CU*BASE max earnings sweep toolkit, and more. We will review with you each one of these strategies and why they should be important to you. We'll review: • Are you offering business/commercial services to members today? If so, what are they? • Do you have an interest in learning more about Business Online Banking (**BizLink 247**)? • Are you planning to offer deposit products (savings, checking, certificates) to your business/commercial member audience? • The third-party solutions that CU*Answers offers today for your business/commercial members to tap into. • We'll make recommendations for products or perhaps engagements in this catalog that may be beneficial to you and why!
Duration	30 minutes
Consulting or Custom Training	Consulting
Designed for	Credit Unions that want to get the most out of what's available or to leverage their existing investments to do more!
Pricing	**FREE!** *Online Only*
Visit the Store	https://store.cuanswers.com/product/bizlink-free-check-up/

Onboarding Business Members to *BizLink 247*

Short Description	We will review the best practices for enrolling a member into **BizLink 247**. We will help your credit union review the processes so that you can create any necessary internal documentation for your team to use when discussing the details with business members.
Duration	60 minutes
Consulting or Custom Training	Custom Training & Consulting
Designed for	Individuals who may be new to the role of servicing business members and/or individuals who are interested learning best practices from the network.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/onboarding-business-members-to-bizlink-247/

Getting Started with the CU*BASE Max Earnings Sweep Toolkit

Short Description	We will review the configurations necessary to enroll a business/commercial member into the Max Earnings Sweep toolkit, and we will also discuss the variations of the configurations that are available, including the ability to charge a monthly fee that is uniquely identified per enrollment.
Duration	60 minutes
Consulting or Custom Training	Custom Training & Consulting
Designed for	Individuals who work with business/commercial members often, and/or credit union executives that are interested in learning more about an offering that could be offered to business/commercial members.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/getting-started-with-the-cubase-max-earnings-sweep-toolkit/

Getting Started with the CU*BASE BizWatch for ACH Toolkit

Short Description	During this session, we will review the configuration options available to offer ACH Positive Pay services to your business/commercial membership. We will also review the daily operations of when your members should expect to receive emails notifying them of any exceptions to review in **BizLink 247**.
Duration	60 minutes
Consulting or Custom Training	Custom Training & Consulting
Designed for	Credit union employees who offer services to business/commercial members, and/or individuals who are interested in learning more about the services available for business/commercial members.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/getting-started-with-the-cubase-bizwatch-for-ach-toolkit/

CU*ANSWERS Cards & Payments

As part of CU*Answers Management Services, Cards & Payments is your one stop location for all EFT related information including ATM/debit & credit cards, instant issue cards, bill pay, compromised card support, and shared branching. We also provide consulting to help you maximize your investment in EFT products and features and provide for enhanced member service experiences.

Cards & Payments

Cards & Payments Free Check Up!

Short Description	This engagement is for credit unions that may or may not be leveraging CU*BASE tools today that can improve workflows, grow card, or loan portfolios, or bring new features like instant payments, shared branching, or bill pay to your credit union members. We'll review with you briefly different areas of Cards & Payments or your money movement team, to see if you're taking advantage of all the network has to offer in this area to help you get the most out of your CU*Answers investment! What we'll review: • What products and workflows you're leveraging now and how that's going? • We will review the Dashboards that are available for the products and services. • What are your money movement goals? • Existing strategies and products you could be leveraging now! • Upcoming strategies, products, and projects! Including webinars, trainings, and demos. • We'll make recommendations for products or perhaps engagements in this catalog that may be beneficial to you and why!
Duration	30 minutes
Consulting or Custom Training	Consulting
Designed for	Credit Unions that want to get the most out of what is available or to leverage their existing toolset to do more!
Pricing	**FREE!** *Online Only*
Visit the Store	https://store.cuanswers.com/product/settlemint-eft-free-check-up/

Tune-Up: ATM / Debit

Short Description	The ATM/Debit Card Tune-Up is a session where our Cards & Payments Team will review your credit union's ATM and Debit Card configurations, dashboards, and reports. At the end of each tune-up, you will be provided a detailed take-away email, listing all that was reviewed, as well as address any questions that were discussed during the meeting. We will also provide helpful material to assist with any changes you may want to make. Tune-ups are beneficial to a credit union's overall health as it gives an idea of where you are at with your ATM/Debit Card portfolio, as well as what changes you can make to tidy things up!
Duration	60 minutes
Consulting or Custom Training	Consulting
Designed for	This engagement is designed for those wanting an in-depth review of their ATM/Debit Card products and to better understand the use of these products in CU*BASE.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/tune-up-atm-debit/

Tune-Up: Credit Cards

Short Description	The Credit Card Tune-Up is a session where our Cards & Payments Team will review your credit union's credit card configurations, dashboards, and reports. At the end of each tune-up, you will be provided a detailed take-away email, listing all that was reviewed, as well as address any questions that were discussed during the meeting. We will also provide helpful material to assist with any changes you may want to make. Tune-ups are beneficial to a credit union's overall health as it gives an idea of where you are at with your credit card portfolio, as well as what changes you can make to tidy things up!
Duration	60 minutes
Consulting or Custom Training	Consulting
Designed for	This engagement is designed for those wanting an in-depth review of their Credit Card products and to better understand the use of these products in CU*BASE.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/tune-up-credit-cards/

ATM / Debit Training

Short Description	ATM/Debit Card training is a session where our Cards & Payments Team will provide you with training on how to order cards, maintenance cards, look at transaction activity, and discuss recommended reports to review.
Duration	60 minutes
Consulting or Custom Training	Custom Training
Designed for	This engagement is designed for those wanting an overview on processing or researching ATM/Debit cards or transactions.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/atm-debit-training/

In-House Credit Card Training

Short Description	In-House Credit Card training is a session where our Cards & Payments Team will provide you with training on how to order cards, maintenance cards, look at transaction activity, review the loan on CU*BASE and discuss recommended reports to review.
Duration	60 minutes
Consulting or Custom Training	Custom Training
Designed for	This engagement is designed for those wanting an overview on processing or researching credit cards or transactions.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/in-house-credit-card-training/

Tune-Up: Paymentus Bill Pay

Short Description	For clients using Paymentus (formerly Payveris) Bill pay services. Join us to take an in-depth look at all Bill Pay configurations, limits, tools, dashboards and more. We will also answer your questions and offer training sessions.
Duration	60 minutes
Consulting or Custom Training	Consulting
Designed for	This engagement is designed to assist tuning up the Paymentus Bill Pay Services.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/tune-up-paymentus-bill-pay/

PASS and Paywatch Training

Short Description	For clients using Paymentus (formerly Payveris) Bill pay services. Join us to review the PASS and provide training around how to use the site to assist our members.
Duration	60 minutes
Consulting or Custom Training	Custom Training
Designed for	This engagement is designed to assist tuning up the Paymentus Bill Pay Services.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/pass-and-paywatch-training/

Paywatch Fraud Monitoring Consulting

Short Description	For clients using Paymentus (formerly Payveris) Fraud monitoring services. We will work with you on understanding the rules currently in place and make any recommendations on suggested changes
Duration	60 minutes
Consulting or Custom Training	Consulting
Designed for	This engagement is designed to assist with understanding what fraud rules are in place and confirming they are what you are expecting.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/paywatch-fraud-monitoring-consulting/

EarningsEdge

Whether you are looking to begin offering a new product to your membership or offer a new benefit to your membership, the Earnings Edge team has a sole purpose to improve your credit union's operations. The team will work with you to strategize, configure, and implement the tools needed to increase the efficiencies of your team. We will provide the consulting needed to keep your credit union on top of the technology that is at your fingertips through CU*BASE. Partnering with the Earnings Edge team will give you the edge you need to be seen as number one in the eyes of your members and your peers.

Earnings Edge

Earnings Edge Free Check Up!

Short Description	This engagement is for credit unions that may or may not be leveraging the most out of the Deposit Operations tools within CU*BASE! We will spend time discussing the CU*BASE qualified dividend toolkit, the CU*BASE Tiered Services toolkit, the CU*BASE marketing club toolkit, the CU*BASE cross sales toolkit, and additional resources within our network that are available. We will review with you each one of these strategies and why they should be important to you. We'll review: • Do you have a rewards program for members to earn benefits based upon their patronage to your credit union? If not, we will discuss options available. • Are you maximizing the Certificate/CD and Savings/Checking product configurations in CU*BASE? • Do you have a cross sales program for your staff? And are you paying incentives? CU*BASE can help track the information for you. • Have you ever paid your members a bonus dividend or patronage dividend? Did you know that native options exist in CU*BASE to pursue both concepts? • We'll make recommendations for products or perhaps engagements in this catalog that may be beneficial to you and why! • Upcoming educational opportunities such as webinars, trainings, Conversations On... events.
Duration	30 minutes
Consulting or Custom Training	Consulting
Designed for	Credit Unions that want to get the most out of what's available or to leverage their existing investments to do more!
Pricing	**FREE!** *Online Only*
Visit the Store	https://store.cuanswers.com/product/earnings-edge-free-check-up/

Getting Started with CU*BASE Marketing Clubs

Short Description	In this session, we will review the capabilities of the CU*BASE Marketing Club toolkit and set the course for any designs that would meet the goals of the credit union. Popular examples of marketing clubs include providing loan rate benefits to members who have met a direct deposit threshold and/or providing a fee waiver to youth members.
Duration	60 minutes
Consulting or Custom Training	Custom Training
Designed for	Credits unions who may not be using the CU*BASE Marketing Club toolkit and/or credit unions who are interested in reviewing/auditing existing Marketing Club strategies.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/getting-started-with-cubase-marketing-clubs/

Getting Started with the CU*BASE Tiered Services Toolkit

Short Description	In this session, we will review the various methods in which your credit union could deploy a tiered services/rewards program for your members. We will not only review the configuration options available, but we will discuss your vision as a credit union and what you wish to explore to reward your members for their usage of the credit union.
Duration	60 minutes
Consulting or Custom Training	Custom Training & Consulting
Designed for	Individuals who are looking to get started with the CU*BASE Tiered Services program and/or individuals who wish to review the options to see if it is a fit for the future of your credit union.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/getting-started-with-the-cubase-tiered-services-toolkit/

Getting Started with the CU*BASE Qualified Dividends Toolkit

Short Description	We will review the CU*BASE Qualified Dividends toolkit and consider all variables for transitioning your existing checking account holders into a qualified dividends checking product. We will review the details available for qualifications, the options to reward members for qualifying, etc.
Duration	60 minutes
Consulting or Custom Training	Custom Training & Consulting
Designed for	Individuals who are interested in learning more about the CU*BASE Qualified Dividends toolkit, or individuals who are interested in reviewing options available for bringing new checking offerings to your credit union.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/getting-started-with-the-cubase-qualified-dividends-toolkit/

Best Practices for CU*BASE Service Charges

Short Description	We will review the options available for configuring a minimum balance service Charge, an account service charge, or a transaction service charge through CU*BASE. The discussion will revolve around the options that are available for configuring the service charge, as well as other consideration that you may wish to ponder (fee waivers, marketing clubs, tiered services, etc.).
Duration	60 minutes
Consulting or Custom Training	Custom Training & Consulting
Designed for	Individuals who are interested in learning about the customization options available for configuring a service charge in CU*BASE.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/best-practices-for-cubase-service-charges/

Best Practices for CU*BASE Cross Sales

Short Description	We will review memo/tracker type configurations, and the CU*BASE Cross Sales configurations that can provide your team with the opportunity to track, and follow-up on conversations with members. Additionally, we will discuss how incentives can be configured and tracked in CU*BASE as well as how management can review the cross sales activity through the credit union. We will also discuss how to effectively use the CU*BASE Next Suggested Product toolkit as a visual stimuli for CU staff to discuss opportunities with members.
Duration	60 minutes
Consulting or Custom Training	Custom Training & Consulting
Designed for	Credit union employees that are looking to take advantage of the CU*BASE Cross Sales toolkit to inspire staff to have conversations with members, and/or CU executives who are looking to alter or adjust an existing cross sales culture.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/best-practices-for-cubase-cross-sales/

CU*BASE Savings/Checking Product Configurations

Short Description	We will review all the options available within the CU*BASE Dividend Application configuration to provide you with all of the details that are available for offering a savings/checking product. This will include a review of account suffix configurations, and how they play a role in the architecture of the product configurations, as well as a review of the options that can be "tied to" a product (i.e., Debit Card Roundup).
Duration	60 minutes
Consulting or Custom Training	Custom Training & Consulting
Designed for	Credit union employees responsible for managing deposit products and/or credit union employees interested in learning more about the customization options available for savings/checking products.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/cubase-savings-checking-product-configurations/

CU*BASE Certificate Product Configurations

Short Description	We will review all the options available within the CU*BASE Certificate configuration to provide you with all the details that are available for offering certificates. This will include a review of the CD Application Type configuration as well as the CD Type configuration and how they are used together to create a product available to your membership.
Duration	60 minutes
Consulting or Custom Training	Custom Training & Consulting
Designed for	Credit union employees responsible for managing certificate products and/or credit union employees interested in learning more about the customization options available for certificate products.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/cubase-certificate-product-configurations/

Rewarding Members with a Patronage or Bonus Dividend

Short Description	During this session, we will thoroughly review the CU*BASE Bonus Dividend toolkit and the CU*BASE Patronage dividend toolkit. Additionally, we will review options for auditing/testing a bonus dividend or patronage dividend and discuss the options for scheduling the posting (if applicable).
Duration	60 minutes
Consulting or Custom Training	Custom Training & Consulting
Designed for	Credit union management teams who are interested in rewarding their members for their patronage to the credit union.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/rewarding-members-with-a-patronage-or-bonus-dividend/

Under the umbrella of the Earnings Edge team, the Earnings Edge Accounting Services (EEAS) team helps support credit union deposit operations in the back-office from day one and onward. EEAS provides onboarding credit unions with intensive training on accounting procedures, balancing GLs, strategizing back-office toolkits, and managing processes for budgets, subsidiaries, exceptions, accounts payable, investments, and much, much more. This team works with credit unions beyond their conversion period, providing support to back-office teams through their extensive depth of experience and knowledge. Let EEAS help you leverage the right tools to make your daily, monthly, and yearly accounting tasks organized, efficient, and stress-free.

Earnings Edge Accounting Services

Earnings Edge Accounting Services Free Check Up!

Short Description	This engagement is for credit unions that may or may not be leveraging the most out of the Accounting/Back Office tools within CU*BASE! We will spend time discussing the process of posting journal entries, the CU*BASE Chart of Accounts options, Branch Accounting, CU*BASE Financial Statements, and best practices for daily balancing techniques. We will review with you each one of these strategies and why they should be important to you. We'll review: • Are you maximizing your usage of templates when posting your journal entries? • Are you producing your financial statements through CU*BASE? If not, why? • Have you reviewed your Accounts Payable Workflow Controls? • Have you reviewed your ACH Posting Controls? • What are your daily processes for performing your daily balancing routines? • We'll make recommendations for products or perhaps engagements in this catalog that may be beneficial to you and why!
Duration	30 minutes
Consulting or Custom Training	Consulting
Designed for	Credit Unions that want to get the most out of what's available or to leverage their existing investments to do more!
Pricing	**FREE!** *Online Only*
Visit the Store	https://store.cuanswers.com/product/earnings-edge-accounting-services-free-check-up/

Exceptions Processing Overview

Short Description	During the Exceptions Processing Overview training, our Earnings Edge Accounting Services team will walk through exceptions processing with your credit union. We will cover our standard procedures for working exceptions, tips and tricks, and also troubleshooting steps. This training is designed for credit union employees that are either new to processing exceptions or would like to learn more about our best practices.
Duration	60 – 120 minutes
Consulting or Custom Training	Custom Training
Designed for	This training is designed for credit union back-office employees that are looking to learn more about exception processing and best practices.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/exceptions-processing-overview/

Back-Office Daily Tools and Reports Overview

Short Description	During the Back-Office Daily Tools and Reports Overview, our Earnings Edge Accounting Services team will discuss the tools and reports that we recommend monitoring on a daily and/or frequent basis. We will cover things such as exception reports, notification reports, and daily tools and reports used for balancing. This training is designed for back-office credit union employees looking to learn more about tools and reports that we recommend monitoring.
Duration	60 – 120 minutes
Consulting or Custom Training	Custom Training
Designed for	This overview is designed for back-office employees who are looking to learn more about the reports and tools that we recommend monitoring on a normal and/or daily basis.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/back-office-daily-tools-and-reports-overview/

Tune-Up: Accounts Payable

Short Description	During the Accounts Payable Tune-Up, our Earnings Edge Accounting Services team will cover everything that you need to know about the accounts payable toolkit offered in CU*BASE. This includes customizable options like invoice approvers, ACH payments, and electronic invoice image storage.
Duration	60 minutes
Consulting or Custom Training	Custom Training
Designed for	This tune-up is meant for credit unions who either do not utilize the accounts payable toolkit currently, or just credit unions who would like to learn more about what it has to offer.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/tune-up-accounts-payable/

Daily Balancing Checklist Customization/Utilization

Short Description	During the Daily Balancing Checklist Customization/Utilization consult, our Earnings Edge Accounting Services team will work with your back-office staff to create a daily balancing checklist that works with your products and services. We will then train your staff on how to utilize it to assist your back-office staff with daily balancing. This training is designed for credit unions who would like to streamline their back-office balancing process.
Duration	120 – 180 minutes
Consulting or Custom Training	Consulting
Designed for	This training is designed for credit unions who are looking to utilize the daily balancing checklist to better assist their back-office personnel with daily balancing, while streamlining the process as a whole.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/daily-balancing-checklist-customization-utilization/

CU*BASE Wire Toolkit Overview

Short Description	During the CU*BASE Wire Toolkit Tune-Up, our Earnings Edge Accounting Services team will discuss your credit union's usage of the wire toolkit offered within CU*BASE and offer advice on how to take full advantage of the tools offered. This is designed for credit unions who may be looking to begin utilizing the wire toolkit within CU*BASE, or credit unions who are looking to ensure they are taking full advantage of the toolkit.
Duration	60 minutes
Consulting or Custom Training	Custom Training
Designed for	This tune-up is designed for credit unions who want to ensure they are taking full advantage of the Wires toolkit that CU*BASE has to offer, as well as new credit unions that are interested in beginning to utilize this toolkit.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/cubase-wire-toolkit-overview/

CU*BASE Budget Research Tools

Short Description	Are you interesting in learning more about the CU*BASE tools that were designed to aide you in preparing your budget? In this session we will review the CU*BASE tools that are most widely used for preparing for your budgeting exercises. We will review tools that help you forecast future dividend expense for deposit products, CU*BASE and Analytics Booth Portfolio Analysis tools, and the 10-year and 3-year GL History tools that are available in CU*BASE and Analytics Booth.
Duration	120 minutes
Consulting or Custom Training	Custom Training
Designed for	This engagement is designed for an individual that is looking to get started with their budgeting efforts, for someone who may want a refresher on the research options that are available, and/or someone who has a desire to review existing budgeting preparation techniques.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/cubase-budget-research-tools/

Budgeting with CU*BASE

Short Description	Review current budget process and propose recommendations for CU*BASE Budgeting Tools. Train CEO/CFO or designated staff on tools, provide consulting on budget configurations and best practices, review final budget, and recommend adjustments if necessary.
Duration	Up to 12 hours
Consulting or Custom Training	Consulting
Designed for	CEO, CFO, Accounting Manager, VP of Accounting, Accounting staff, Back office staff
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/budgeting-with-cubase/

Preparing for Your Budget in CU*BASE

Short Description	Are you just beginning to ponder your budget for the next year? Are you wondering where to start to prepare for your budget exercises in CU*BASE? Time will be spent reviewing the chart of account updates to configure you associated GL information (accrual/income or accrual/expense) for projecting and modeling asset/liability GL accounts as well as a review of the CU*BASE budget group toolkit. By configuring these tools effectively, one can set themselves up for the greatest amount of success for budgeting.
Duration	60 minutes
Consulting or Custom Training	Custom Training
Designed for	This engagement is designed for an individual who is either just getting started with budgeting exercises in CU*BASE and/or an individual who is looking to review/alter any existing configurations based on best practices.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/preparing-for-your-budget-in-cubase/

Managing EOM Processes in CU*BASE

Short Description	In this session we will review the best practices for completing your EOM processes in CU*BASE for your accounting teams. We will review the steps that are included in our Balancing Made Easy booklet for EOM activities. This includes, but is not limited to, preparing/posting your CU*BASE investment portfolio details, preparing/posting your CU*BASE subsidiary details, preparing/generating your CU*BASE financial statements, preparing/reviewing CU*BASE, preparing/reviewing delinquent loans, and finally closing the books for the month.
Duration	120 minutes
Consulting or Custom Training	Custom Training
Designed for	Staff involved in your EOM exercises and/or staff who are interested in confirming best practices for EOM processes.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/managing-eom-processes-in-cubase/

CU*BASE Financial Statement Customization

Short Description	If you are not producing your financial statements through CU*BASE and have an interest in learning more about the customization options that exist for your financial statements, then this session is for you. Within this session we will review the configuration options available for configuring a financial statement, and we will also discuss the best practices for producing the financial statements, including the options that are available for exporting the financial statement data outside of CU*BASE. If you have a financial statement that you have a desire to create, we can use our time together to configure and design that financial statement in CU*BASE for yourself and your credit union to utilize going forward.
Duration	120 minutes
Consulting or Custom Training	Custom Training
Designed for	Staff who are interested in adjusting your financial statement strategies and/or staff who might be interested in learning more about the CU*BASE financial statement toolkit.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/cubase-financial-statement-customization/

Reports/Dashboards for Your Accounting/Back Office Team

Short Description	In this session we will review the most popular reports and dashboards that are used by accounting and back-office teams. We will highlight each one of the reports/dashboards and we will provide best practices for how and why to use these tools in your day-to-day operations. Some examples of the tools that we cover are listed below: • Dividend/Interest Accrual Dashboard • Financial Statements • Variance Analysis • Dividend/Interest Rate Forecasting Tools • Contingent Liability Trends • Accounts Payable Dashboard
Duration	120 minutes
Consulting or Custom Training	Custom Training
Designed for	Those who want a refresher on the most popular reports/dashboards for your accounting/back-office teams, or are interested in seeing what is available. Our goal is to leave you with the knowledge to not only create and review the tools, but also how often to review the tools, etc.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/reports-dashboards-for-your-accounting-back-office-team/

Balancing Subsidiaries/Investments in CU*BASE

Short Description	Here, we will focus on the best practices for balancing your subsidiaries and your investments. We will also review your current configurations and make suggestions on alterations that would assist in future balancing efforts. Starting by reviewing the general ledger structure of your subsidiaries and investments, we will make suggestions on updates that will streamline the operations. We will also review the Subsidiary and Investment Trial Balance reports that are most commonly used for balancing.
Duration	60 minutes
Consulting or Custom Training	Custom Training
Designed for	If you have not used the CU*BASE Subsidiary or Investment toolkit, and you want to learn more about the processes, and/or you may be auditing your existing balancing processes.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/balancing-subsidiaries-investments-in-cubase/

CU*BASE GL Reporting/Inquiry Best Practices

Short Description	In this session, we will review how to inquire on the history of a GL, how to add comments to an already posted GL batch, how to research a 'TR' journal entry for further details, how to review activity for misc. posting codes, etc. We will also spend time reviewing the GL reporting options as well as the options that are available for download or for automation (configuring a GL Trial balance to automatically generate on the 1st of each month for example…)
Duration	120 minutes
Consulting or Custom Training	Custom Training
Designed for	Staff who may be interested in reviewing new or alternative approaches for inquiring on or reporting on general ledger activity.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/cubase-gl-reporting-inquiry-best-practices/

CU*BASE Accounts Payable Workflow Controls

Short Description	In this session, your credit union's accounts payable workflow controls, and we will discuss best practices, as well as provide advice as to how to fully take advantage of the options available (as well as next steps where necessary). We will also discuss how vendors that your CU may already be paying via ACH can be included within your vendor history automatically.
Duration	120 minutes
Consulting or Custom Training	Custom Training
Designed for	Staff who are interested in taking advantage of the CU*BASE A/P workflows, and/or staff who are interested in understanding the options that are available to streamline your accounts payable processes.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/cubase-accounts-payable-workflow-controls/

CU*BASE Monthly Processing for Subsidiaries

Short Description	If you are new to CU*BASE or need to learn more about the Subsidiary Processing tools this is the session for you. This session will provide your accounting/back-office team with steps needed to process your monthly Subsidiary tasks. We will start with an overview of configurations, reporting options and end with the monthly subsidiary tasks. These tasks will include but are not limited to adding new, adjusting, closing, asset tracking, and finally processing your monthly expenses.
Duration	60 minutes
Consulting or Custom Training	Custom Training
Designed for	CEO, CFO, Accounting Manager, VP of Accounting, or back-office staff
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/cubase-monthly-processing-for-subsidiaries/

CU*BASE Monthly Processing for Investments

Short Description	If you are new to CU*BASE or need to learn more about the Investment tools this is the session for you. This session will provide your accounting/back-office team with steps needed to process your monthly Investment tasks. We will start with an overview of configurations, reporting options and end with the monthly investment tasks. These tasks will include but are not limited to adding new, adjusting, closing, processing payments, updating market values, and processing accruals of your investments.
Duration	60 minutes
Consulting or Custom Training	Custom Training
Designed for	CEO, CFO, Accounting Manager, VP of Accounting or back-office staff
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/cubase-monthly-processing-for-investments/

Managing and Posting Journal Entries in CU*BASE

Short Description	In this session we will review how to create a journal entry, how to create a recurring journal entry, how to create a template, how to copy a template for posting, how to un-post a journal entry, how to add comments for a journal entry, and more. If you are interested in re-defining your journal entry processes, we will use this time to demonstrate and discuss the features of the CU*BASE journal entry/posting toolkit.
Duration	120 minutes
Consulting or Custom Training	Custom Training
Designed for	Staff who are interested in review best practices for posting journal entries in CU*BASE and/or staff who are interested in learning more about what the CU*BASE toolkit can do to streamline your CU's posting processes.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/managing-and-posting-journal-entries-in-cubase/

ANR/Courtesy Pay Program from Configuration to Implementation

Short Description	In this engagement, if you desire to launch your Courtesy Pay/ANR program in CU*BASE, you can either configure the details yourself in CU*BASE or you can hire us to help you configure all the necessary details for your Courtesy Pay/ANR program. We will cover all aspects of the ANR/Courtesy Pay Program. This includes testing accounts, and reviewing the activation, deactivation, and reactivation process. Follow up consultation is also offered.
Duration	Approximately 60 to 90 minutes per session, approximately 3 sessions based on 2-3 months before live date.
Consulting or Custom Training	Custom Training & Consulting
Designed for	This engagement is designed for those wanting guidance setting up the ANR/Courtesy Pay program, or requesting Earnings Edge cover the whole process.
Pricing	$1000 *Cost for CU to launch program with the help of Earnings Edge* $2500 *Cost to hire Earnings Edge to configure the program through to live day*
Visit the Store	https://store.cuanswers.com/product/anr-courtesy-pay-program-from-configuration-to-implementation/

Preparing Your Accounting/Back-Office Teams for Year-End

Short Description	In this session we will review the best practices for completing your EOY processes in CU*BASE for your accounting teams. We will review the steps that are included in our Year End Processing Guide. This includes, but is not limited to, providing an overview of the booklet content along with steps your credit union needs to take to prepare prior to close. The session will end with the General Ledger Year-End Closing to include confirmation of chart of accounts is configured for close, transfer of net income to equity, prepare system to process year-end, process year end, post final journal entries, confirmation of close against financials and finally assist in resetting YTD Investment Income Tracking if applicable.
Duration	120 minutes
Consulting or Custom Training	Custom Training
Designed for	Staff involved in your EOY exercises and/or staff who are interested in confirming best practices for EOY processes.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/preparing-your-accounting-back-office-teams-for-year-end/

Imaging Solutions

We have created imaging solutions that are an inherent part of your core data processing system. We've accomplished this by having our eDocument strategist and programmers work directly with the VP of Software Development for both CU*BASE and the **It's Me 247** online and mobile banking suites. Together we have created solutions that fit hand in glove with your core processing tools to make your imaging solution an integral part of your day-to-day operations!

Imaging Solutions

Imaging Solutions Free Check Up!

Short Description	This engagement is for credit unions that may or may not be leveraging electronic documents today to automate their workflow and engage members remotely to get business done! We'll review with you briefly different areas of Imaging Solutions to see if you're taking advantage of all the network has to offer in this area to help you get the most out of your CU*Answers investment! We'll review: • What tactics, products and workflows you're leveraging now and how that's going. • The integrity of your data – is what you think is there actually there for when you need it? • Existing strategies and products you could be leveraging now! • Upcoming strategies, products and projects! • We'll make recommendations for products or perhaps engagements in this catalog that may be beneficial to you and why!
Duration	30 minutes
Consulting or Custom Training	Consulting
Designed for	Credit Unions that want to get the most out of what's available or to leverage their existing investments to do more!
Pricing	**FREE!** *Online Only*
Visit the Store	https://store.cuanswers.com/product/imaging-solutions-free-tune-up/

Imaging Solutions New Employee Training

Short Description	Kickstart your new employees training with a solid overview of Imaging Solutions specialized products like CU*Spy Reports, Statements, Images, CU*Forms, eDOCSignature, and Requested Document. Review how to use each tool to get the most out of your workflow and working with members remotely to get business done so your new employee has a strong foundation of the fundamentals of these tools.
Duration	60 minutes
Consulting or Custom Training	Custom Training
Designed for	New credit union employees.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/imaging-solutions-new-employee-training/

Imaging Solutions In-House Administrator Review

Short Description	Consulting on managing your In-House Imaging server from the administrator's perspective. Review server application details, Vault Manager, notifications, permissions, purging and understand what documents your credit union staff is saving as a part of your imaging due diligence. We'll help you understand what you need to do to keep your In-House imaging system running like a well-oiled machine so your data is where you expect it when you need it.
Duration	60 minutes
Consulting or Custom Training	Consulting & Custom Training
Designed for	Credit union administrators
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/imaging-solutions-in-house-administrator-review/

CU*Forms Builder Session

Short Description	Let's dive deep into building forms with CU*Forms and discuss how to make the most of them for your staff. Be prepared to go beyond just forms to think about how to change your processes and procedures of old existing paper forms into new workflows accomplished by leveraging electronic forms with dropdowns, checkboxes, and even radio buttons with conditional features.
Duration	60 minutes
Consulting or Custom Training	Consulting & Custom Training
Designed for	Credit union forms builders
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/cuforms-builder-session/

Tune-Up: Imaging Solutions

Short Description	Is your credit union getting the most out of your investment in your Imaging Solution? Maybe you're not sure, after all you don't know what you don't know. With this look over the shoulder from the trained expert, we'll dive in and find out! This tune-up is for any credit union looking to do a deep dive into their current imaging solutions and strategies and discuss how they are currently leveraging it, how they could be leveraging it, and what is available to them that they are not yet leveraging to accomplish their strategic objectives. Once we have a good understanding of those 3 areas, we can help you set goals and objectives specific to you for your agenda. We will also make clear how the Imaging Solutions team can work hand in glove with your team to achieve them.
Duration	1 Day
Consulting or Custom Training	Consulting & Custom Training
Designed for	Credit union process leaders (heads of Accounting, Lending, Teller, Member Services etc.)
Pricing	$1000 *On-Site Only*
Visit the Store	https://store.cuanswers.com/product/tune-up-imaging-solutions/

The Internet Retailer Support Center (IRSC) is a CU*Answers online store for credit union virtual channel project managers. It brings together several digital strategy products into one cohesive location and a single point of contact—no more searching across CU*Answers' websites! Credit unions looking to expand their virtual channel marketplace can shop and explore the offerings online as well as check project development status.

Internet Retailer Service Center (IRSC)

CU Publisher Free Check Up!

Short Description	Are you interested in learning more about CU Publisher? In this session we will review the CU Publisher's tools at a high level. What we'll review: • What products you're leveraging now and how that's going? o Any pain points you or your team may have with CU Publisher • Discuss what products your CU aren't currently utilizing • User Management • We'll make recommendations for products or perhaps engagements in this catalog that may be beneficial to you and why!
Duration	60 minutes
Consulting or Custom Training	Consulting
Designed for	Credit unions that want to get the most out of what is available or to leverage their existing toolset to do more!
Pricing	**FREE!** *Online Only*
Visit the Store	https://store.cuanswers.com/product/cupublisher-free-check-up/

CU Publisher – IM 247 Mobile

Short Description	Are you interested in learning more about CU Publisher – IM 247 Mobile? In this session we will review IM 247 Mobile and offer suggestions on your mobile app. What we'll review: • Features and functionalities of your existing app. • We'll make recommendations for features not currently being used. • This session will focus on maximizing the value you get from both your existing mobile app and IM 247 Mobile.
Duration	60 minutes
Consulting or Custom Training	Consulting
Designed for	Credit unions that want to get the most out of what is available or to leverage their existing toolset to do more.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/cu-publisher-im-247-mobile/

CU Publisher – IM 247 Desktop

Short Description	Are you interested in learning more about CU Publisher – IM 247 Desktop? In this session we will review IM 247 Desktop and offer suggestions on your online banking platform. What we'll review: • Features and functionalities • We'll make recommendations for features not currently being used.
Duration	60 minutes
Consulting or Custom Training	Consulting
Designed for	Credit unions that want to get the most out of what is available or to leverage their existing toolset to do more.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/cu-publisher-im-247-desktop/

CU Publisher – MOP or MAP Review

Short Description	Are you looking for ways to enhance your MOP/MAP site? In this session we will review the CUs MOP/MAP site and offer suggestions not currently being used. What we'll review: • Features and functionalities of MOP/MAP • We'll make recommendations for features not currently being used.
Duration	60 minutes
Consulting or Custom Training	Consulting
Designed for	Credit unions that want to get the most out of what is available or to leverage their existing toolset to do more.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/cu-publisher-mop-or-map-review/

Lender*VP delivers to your credit union a team of experienced lending professionals that will help you achieve your goals in driving the success of your loan department. The Lender*VP team has years of on-the-street credit union lending experience, combined with an intimate knowledge of CU*BASE tools. Services provided range from 1Click Lending, Consulting, Mortgage Servicing, an Automated Decision Model, Third Party Integrations, and a variety of Loan Delivery Channels to ensure credit unions can remain competitive in the fast-paced lending environment. We can make sure you know what products you need, get them off the ground quickly, and help you drive them to success!

Lender*VP

Lender*VP Free Check Up!

Short Description	This engagement is for credit unions that may or may not be leveraging lending tools today that can improve workflows, grow loan portfolios, or automate loan processes. We will briefly review key lending tools in CU*BASE with you to see if you're taking advantage of our robust loan suite! What we'll review: • What products and workflows you're using now and how that is going • Any pain points you or your team may have with lending in CU*BASE • What are your lending goals? • Upcoming lending products and projects • Upcoming lending events such as webinars, trainings, and demos • We'll make recommendations for products or engagements in this catalog that may be beneficial to help you achieve your goals!
Duration	30 minutes
Consulting or Custom Training	Consulting
Designed for	Credit Unions that want to get the most out of what is available or to leverage their existing toolset to do more!
Pricing	**FREE!** *Online Only*
Visit the Store	https://store.cuanswers.com/product/lendervp-free-check-up/

Review Loan Product Configurations

Short Description	Through this engagement, we will review your loan product configurations to ensure they are set up properly for your credit union lending needs. We will also help you identify any missed opportunities we may see. Your loan products hold a lot of power, so let us help you discover what more could be done to maximize your use of **Tool #470**!
Duration	60 minutes
Consulting or Custom Training	Consulting & Custom Training
Designed for	This engagement is designed for those wanting an in-depth review of their loan products and to better understand the use of loan products in CU*BASE.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/review-loan-product-configurations/

Review Loan Category Configurations

Short Description	Through this engagement, we will review your loan category configurations to ensure they are set up properly for your credit union lending needs. We will also help you identify any missed opportunities we may see. Your loan categories are key for telling a loan how to function, so let's dig in via **Tool #458**!
Duration	60 minutes
Consulting or Custom Training	Consulting & Custom Training
Designed for	This engagement is designed for those wanting an in-depth review of their loan category configurations and to better understand the functionality of loan categories in CU*BASE.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/review-loan-category-configurations/

FUEL Configuration Review

Short Description	Through this engagement, we will review all of your FUEL model settings and reports to see what changes to the model could help increase your passing rate for applications.
Duration	60 minutes
Consulting or Custom Training	Consulting
Designed for	This engagement is designed to assist tuning up the FUEL Decision Model to match up more closely with your credit union policies for underwriting.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/fuel-configuration-review/

1Click "How-To" Training

Short Description	A member from Lender*VP will guide you through a campaign in a step-by-step, slowed down process for your team to learn the "how-to" for 1Click lending. We will start by helping you identify the group of members you want to send the offer to, building your query, and then helping you launch the campaign.
Duration	120 minutes
Consulting or Custom Training	Custom Training
Designed for	This engagement is designed for credit unions that want to learn how to do the 1Click process on their own for their future campaigns.
Pricing	$100/hr *The standard programming of forms is not included and is $99 per form. Please note that this includes the cost of our default query.* *If you need further query customization, there will be an additional fee via the Asterisk Intelligence team.*
Visit the Store	https://store.cuanswers.com/product/1click-how-to-training/

Lending - Request to Disbursement

Short Description	This engagement will start off by having a member of the credit union staff walk through their request to disbursement process with a Lender*VP team member to show them how it is done today. Next, the member of the Lender*VP team will identify areas for improvement, make suggestions, and show the credit union how the request to disbursement process can be used to help maximize time and efficiency for your loan officers! We will also take this time to introduce any new features with the online LOS.
Duration	60 – 120 minutes
Consulting or Custom Training	Consulting & Custom Training
Designed for	Credit union staff who feel like they need a refresher and some tips on how to improve their request to disbursement processes.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/lending-request-to-disbursement/

Standard Participation Lending Toolkit Training

Short Description	This engagement includes in depth training for selling standard 365 participation loans on CU*BASE. Items reviewed will include the packaging loans to be sold toolkit, monthly settlement toolkits, and loan participation reports.
Duration	60-120 minutes
Consulting or Custom Training	Custom Training
Designed for	Clients that need a refresher on how the participation loan toolkit in CU*BASE works.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/standard-participation-lending-toolkit-training/

Lending Dashboards & Reports Training

Short Description	This engagement provides an in-depth review of every-day lending dashboards used for activity tracking purposes as well as the most popular lending reports on CU*BASE. If there is any additional customization needed, please let us know and we are happy to review that option during this engagement as well!
Duration	60 minutes
Consulting or Custom Training	Custom Training
Designed for	Clients that need a refresher on lending reports and dashboards, or who need more custom lending reports.
Pricing	$100/hr *Please note that there may be an additional cost if in-depth query work is required.*
Visit the Store	https://store.cuanswers.com/product/lending-dashboards-reports-training/

Collections Dashboards & Reports Training

Short Description	We will review the collections dashboard along with multiple options for reporting that you can use to customize your requirements!
Duration	60 minutes
Consulting or Custom Training	Custom Training
Designed for	Collections manager/officer or any credit union staff that regularly work with collections reports.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/collections-dashboards-reports-training/

Collections Custom Training

Short Description	We will review the background settings, freeze options, delinquency notices, trackers, and other best practices for collections. Take advantage of this engagement to help make your collection process more expedient!
Duration	60-120 minutes
Consulting or Custom Training	Consulting & Custom Training
Designed for	Any credit union employee involved in collections work that wants a refresher or new collections employees.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/collections-custom-training/

Mortgage & Escrow Training

Short Description	Through this engagement, we will provide training on both mortgage and escrow processing that fits your specific needs. We will review your mortgage loan categories and products for you. We will train you on how to properly process payments and adjustments as well as reversals, and how to handle payoffs, both for 360 and 365 Mortgages. If you offer escrow accounts, training is available on how to open an escrow account and build the disbursement records and how to handle the ongoing escrow disbursements. In addition, we will make sure you are prepared to create your annual escrow analysis.
Duration	60-120 minutes
Consulting or Custom Training	Custom Training
Designed for	This custom training is designed for those clients that offer mortgages, with or without escrow accounts.
Pricing	$100/hr
Visit the Store	https://store.cuanswers.com/product/mortgage-escrow-training/

Bundled Training Recommendations

We encourage you to create the custom package of training and consulting that fits your credit union's needs. However, our teams have created collections of recommended bundles for these common situations.

The New Loan Officer

- Lending – Request to Disbursement
- Lending Dashboards & Reports Training

The New Lending Manager

- Review Loan Product Configuration
- Review Loan Category Configurations

The New Collections Officer

- Collections Custom Training
- Collections Dashboards & Reports Training

The New Card Services Team Member

- ATM/Debit Tune Up
- ATM/Debit Training
- In-House (online) Credit Card Tune Up
- In-House (online) Credit Card Training

The New Accounting Team Member

- Exception Processing Overview
- Back-Office Daily Tools and Reports Overview
- Daily Balancing Checklist Customization/Utilization
- Managing EOM Processes in CU*BASE
- Reports/Dashboards for your Accounting/Back Office Team
- Managing and Posting Journal Entries in CU*BASE

The Query Power User

- CU*BASE Report Builder – Comprehensive Training (A to Z)
- CU*BASE Report Builder – Fundamentals
- CU*BASE Report Builder – Next Steps
- CU*BASE Report Builder – Become a Power User

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