



# Getting the Most from CUPolicyPro

Brought to you by the Virginia Credit Union League  
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# What is CU PolicyPro?

- 230+ model policies and procedures
- Policy management system
  - Create, edit, store, and distribute policies and procedures
  - Auditing tools
  - Policy and Document Review Assignments
- Board Resources
  - Secure document storage and distribution
  - Policy reviews with tracked changes to include with board minutes
  - Assign/Remind board members to review policies/documents
- Deeply discounted for affiliated credit unions!

I was supposed to  
read the policy??



**CUPolicyPro** ✓

**Keep everyone on task with  
CU PolicyPro assignments!**

# Training Reminders

- Utilize the **Support** area for a refresher on how to use the system tools and functions
- **Publishing** options allow several content sections to be selected and published into one printable document, with access based on user rights
- Take advantage of the **Auditing tools** such as track changes, auditing notes, notifications, and date fields
- Use the **Assignment** feature to help keep policy review and maintenance on schedule, and keep staff engaged with the process
- The **Multi-Content Functions** tab can be used to apply Revised, Reviewed, or Board Approved dates to multiple content sections at one time
- Sign up for the **monthly newsletter** on the Newsletter page in the Support area



# Getting Access and Support!

- Find your unique URL  
<https://www.leagueinfosight.com/client-listing>
- Use the Forgotten Password link if needed
- Contact [polycysupport@cusolutionsgroup.com](mailto:polycysupport@cusolutionsgroup.com) with questions or if you need assistance



# RecoveryPro

- RecoveryPro will help you develop and implement an effective Business Continuity Plan!
  - **Analyze & Assess:** Identify and prioritize business processes and assess the risks and impacts of a variety of event types
  - **Plan & Prepare:** Develop plans, prepare to manage incidents, and recover your business if an incident occurs
  - **Validate & Maintain:** Ensure your plans are effective and your teams are ready through testing, content reviews, and updates



- RecoveryPro is deeply discounted for affiliated credit unions

Asset Size	Annual Affiliated Credit Union Pricing	Annual Non-Affiliated Credit Union Pricing
Under \$50 million	\$249	\$599
\$50 million - \$150 million	\$549	\$1,399
\$150 million - \$350 million	\$1,049	\$2,599
\$350 million - \$1 billion	\$2,549	\$6,199
Over \$1 billion	\$4,549	\$10,999

- RecoveryPro is on the same platform as CU PolicyPro, so your technical training has already been completed!
- Learn more or purchase RecoveryPro at <https://www.leagueinfosight.com/recoverypro>