



State of Wisconsin
Department of Financial Institutions

Scott Walker, **Governor**

Peter J. Bildsten, **Secretary**

June 1, 2012

LETTER CU 1-12
CREDIT UNION ONLINE ENHANCEMENTS

TO ALL CREDIT UNIONS:

The National Credit Union Administration (NCUA) recently upgraded to Version 2 of Credit Union Online. This is the first major refresh of the system since its original deployment in September 2009. NCUA also moved to a new software platform to improve overall stability and functionality. Microsoft Silverlight, a free program, must be downloaded and installed on all computers accessing Credit Union Online. You will need to install this free software on the system you use to access the CU Online system after May 28th. You can download Silverlight at <http://www.microsoft.com/silverlight/>. The new software provides an improved look and feel to the CU Online system.

NCUA improved the user interface, enhanced functionality, and improved warnings, edits and other quality control tools for all users. Most notable of the changes include:

- *Improved user interface* –the look and feel was freshened with the help of professional web developers focusing on improving the user interface and convenience. The left navigation bar was eliminated to minimize scrolling and created more prominent action buttons.
- *Enhanced Printing Options* –the “printer friendliness” of reports was enhanced. You can now print all Call Report cycles and profile data as an Adobe PDF file.
- *Profile Snapshot* –the profile data can now be captured as of the cycle date in an Adobe PDF format for convenient printing. This provides users with a historical record of the profile.
- *Warnings in the Profile to help prevent errors and improve efficiency* –the warnings, to remind you to enter new information or update existing information, have been enhanced (for example, outdated audit information).
- *Real Time Call Report Calculations and Edits* - Calculations and edits now update during data entry. You no longer need to click “Save” to refresh. However, you are reminded to “save” often while entering data.
- *Call Report Historical Warnings* – Warnings that compare data between several Call Report cycles update and are available during data entry. This feature will help you to catch any inconsistencies or possible errors earlier. Added the capability to export errors and warnings to Microsoft Excel or Adobe PDF.
- *Help Tips and Instructions* –data entry help tips are included in each section of the profile. Call Report Forms and Instructions are also very easy to access for each cycle within the online system.
- *New User Role* –a new user role has been added. You can assign employees or Directors a view-only role that provides access to CU Online information without the ability to edit.

Office of Credit Unions

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- *Less Paper, More Savings* – Credit unions filing online will no longer receive a letter each Call Report cycle. NCUA will use NCUA Express to disseminate Call Report information and reminders reducing costs by more than \$20,000 per year.

NCUA hosted a webcast for credit unions on Tuesday, May 15, 2012 outlining these and other changes to the online application. *For those who could not participate or would like to view the presentation again, NCUA archived the webcast and it can be found at www.ncua.gov.*

It is recommended that all credit unions log on to the system to verify the profile information and familiarize themselves with the system prior to launching the June 2012 Call Report cycle. A few other reminders on the Call Report process:

- Financial statements, including a consolidated balance sheet and income statement, must be submitted to the Office of Credit Unions. Financial statements may be mailed, emailed (WI00@ncua.gov), or faxed (608-267-0479).
- The current call report forms and instructions are available at www.ncua.gov
- Please make note of the due date and submit the call report by the due date. **For the June 30 cycle, the due date is July 20, 2012.**

If you have any questions, feel free to contact this office at 608-261-9543. Credit unions are also encouraged to provide NCUA with any comments or suggestions on improving the system. The email is: credituniononline@ncua.gov

Sincerely,

A handwritten signature in cursive script that reads "Ginger Larson". The signature is written in black ink on a light-colored background.

Ginger Larson, Director
Office of Credit Unions