Verify CU*Forms connectivity

Here are instructions on how to verify that your computer has access to CU*Forms after our firewall rule changes on Tuesday, September 24th, 2024. If you have any questions or concerns, please email <u>imaging@cuanswers.com</u>.

If you currently have access to CU*Spy Reports, you will have access to CU*Forms moving forward. If you are unsure if you have access to CU*Spy, please follow the instructions below.



• Simply login to CU*BASE GOLD.

Click on the button to open the timeout menu.

		E - All Available Tools	્ 🖌	All Availab	k Tools ✓
earch	for	Exact match Search long description		Filters OFF	· •
Tool #		Title	Shortcut	More	
io!	1	Teller Line Posting	TELLER	① ☆	The
io!	2	Work/View Loan Application Status	LOANQ	(i) ★	Help
So!	3	Open/Maintain Memberships/Accounts	OPEN	① ☆	Hub
io!	4	View My Cross Sales Status	MYXSALES	① ☆	
io!	5	Work with Member Follow-ups	TRACKERS	① ☆	
io!	10	Member Starter/Replacement Checks	STARTER	① ☆	Settle MINTPT
io!	11	ATM/Debit Card Maintenance	CARD	① ☆	Setuer wir
io!	12	Update/Order Online Credit Cards	cc	① ☆	RECEIVE
io!	13	Work Online Banking Apps/Requests	ONLINE	① ☆	REAL-TIME
lo!	14	Member Personal Banker	PB	① ☆	JOINT THE DISTUTION AND A STORE OF COMENT
io!	15	Update Membership Information	UMBR	① ☆	
o! elcome, l		Update Account Information	ACCT	() ☆	CT IND A OD
to securi	ŋ,	employee ID	Total # of tools: 895	\sim	CU*BASE

• Click on "CU*Spy Daily Reports"



 If you are successfully seeing the following page, you are all set and ready for the upcoming CU*Forms change. If you didn't not get the following page, please email <u>imaging@cuanswers.com</u> to start next steps.

