

Importing Content from Model Policies or Model BCP

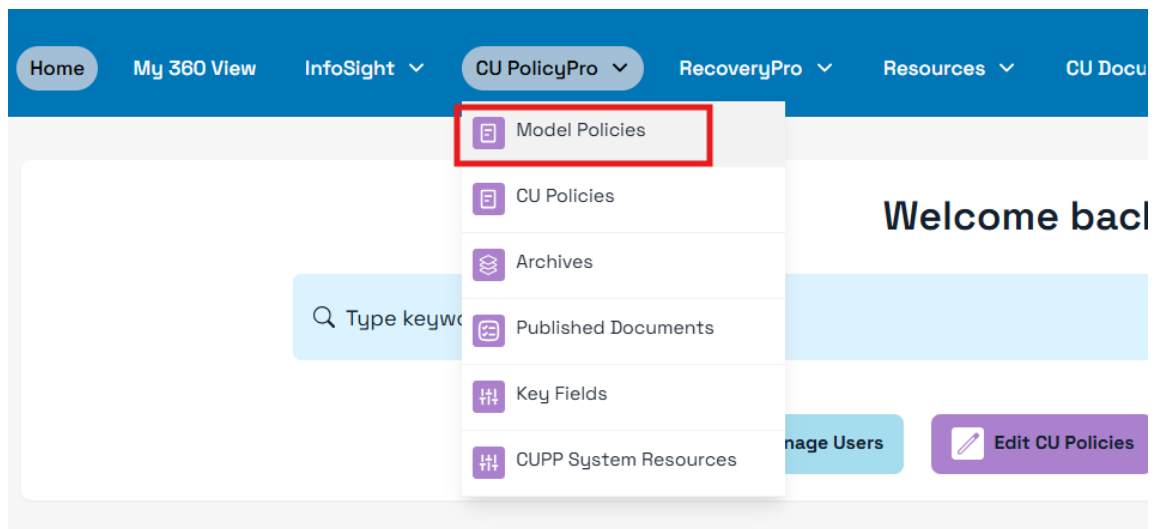
Model content can be imported to the CU Policies or CU BCP, one section or multiple sections at a time.

Importing Multiple Sections of Content

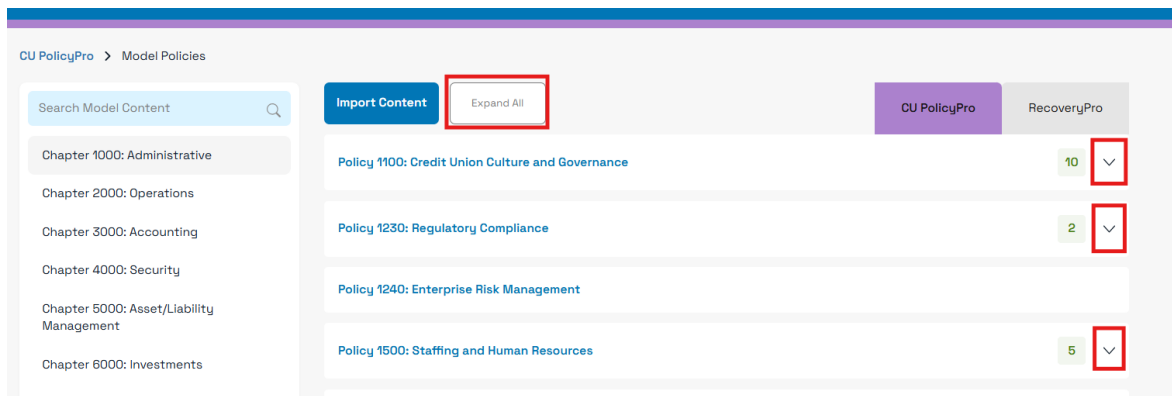
Importing multiple sections of content to your CU Policies or CU BCP is much quicker than importing individual sections if you already know what you need to import.

Important Note: *Importing content will overwrite any existing content you have, so double check your CU Policies or CU BCP before importing to be sure the content doesn't already exist.*

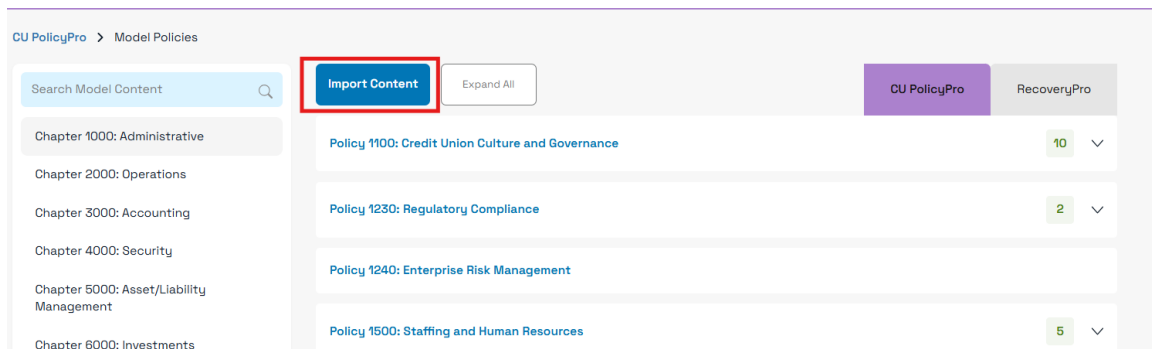
1. From the home page, navigate to *Model Policies* for CU PolicyPro or *Model BCP* for RecoveryPro, using the drop-down menu at the top of the screen.



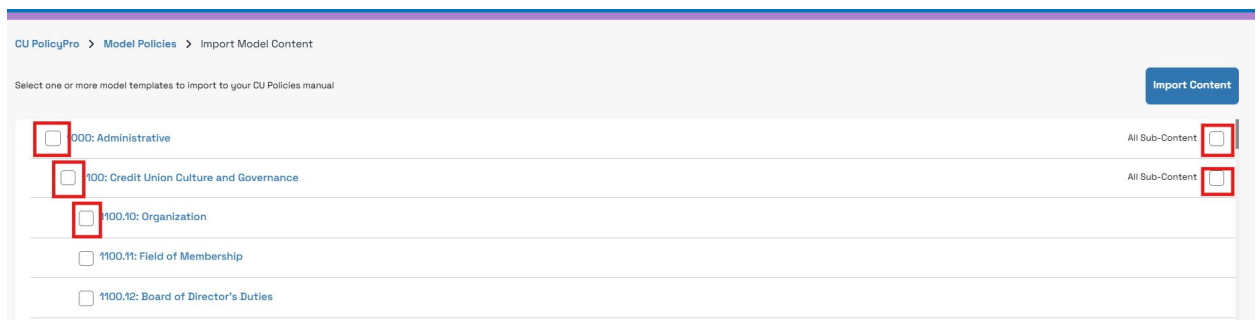
2. By default, the model content listing will be collapsed. The list view can be expanded using the Expand All button or the arrows next to a specific content section.



- When you are ready to import content, click on the Import Content button next to the Expand All button at the top.



- Once you are in the Model Content listing, you can choose to import all content, or click on the box next to content that you wish to import into your CU Policies or CU BCP area.



5. Once you have selected all of the content you wish to import, click on Import Content at the top right or bottom right of your screen. The imported content will now show in your CU Policies or CU BCP areas.

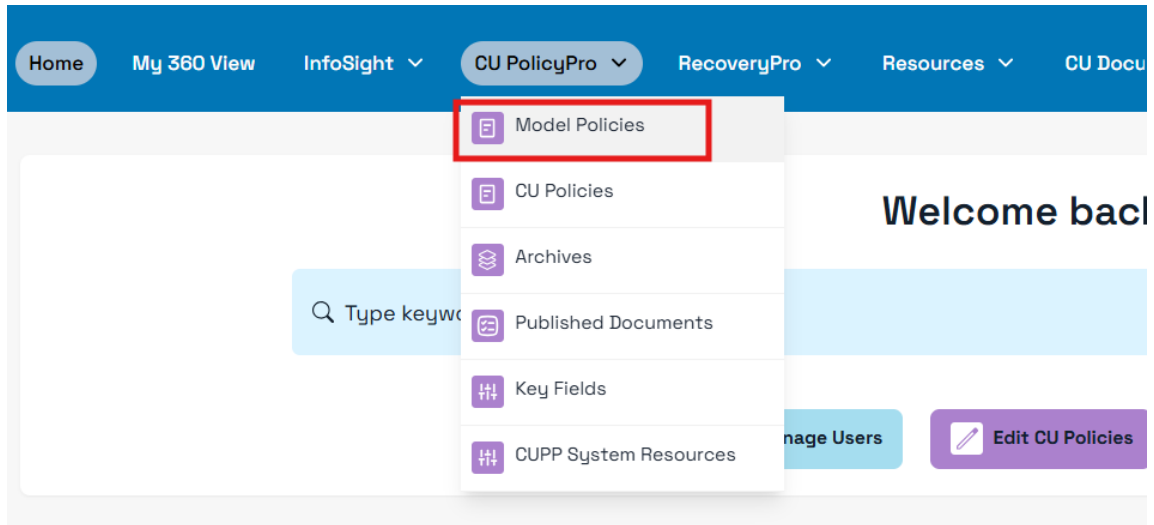
CU PolicyPro > Model Policies > Import Model Content	
Select one or more model templates to import to your CU Policies manual	
<input type="checkbox"/> 1000: Administrative	All Sub-Content <input type="checkbox"/>
<input type="checkbox"/> 1100: Credit Union Culture and Governance	All Sub-Content <input type="checkbox"/>
<input type="checkbox"/> 1100.10: Organization	
<input type="checkbox"/> 1100.11: Field of Membership	
<input type="checkbox"/> 1100.12: Board of Director's Duties	

Importing Individual Sections of Content

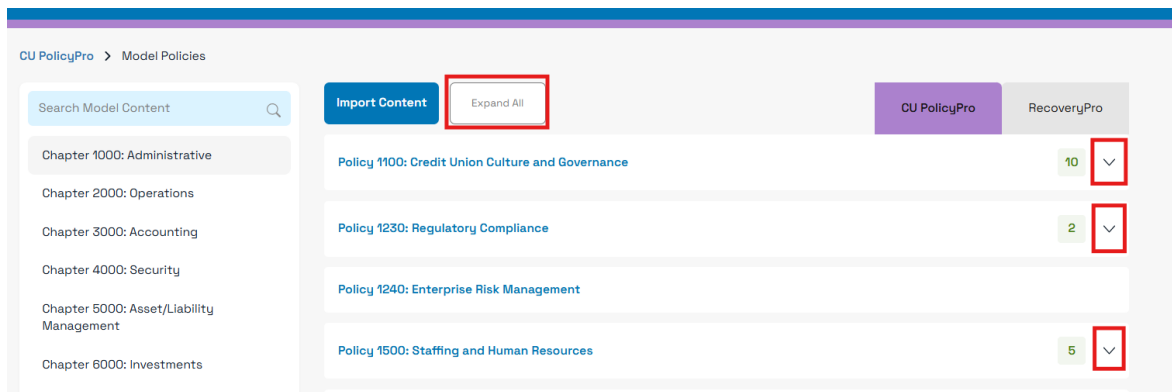
Importing individual sections of content allows you to read the full text prior to importing to your CU Policies or CU BCP.

Important Note: *Importing content will overwrite any existing content you have, so double check your CU Policies or CU BCP before importing to be sure the content doesn't already exist.*

1. From the home page, navigate to *Model Policies* for CU PolicyPro or *Model BCP* for RecoveryPro, using the drop-down menu at the top of the screen.



2. By default, the model content listing will be collapsed. The list view can be expanded using the Expand All button or the arrows next to a specific content section.



3. Click on the section you would like to import. to view the full content prior to importing.

CU PolicyPro > Model Policies

Search Model Content

Chapter 1000: Administrative
Chapter 2000: Operations
Chapter 3000: Accounting
Chapter 4000: Security
Chapter 5000: Asset/Liability Management

Import Content Expand All

CU PolicyPro RecoveryPro

Policy 1100: Credit Union Culture and Governance 10

1100.10: Organization

1100.11: Field of Membership

1100.12: Board of Director's Duties

4. Click on the “Import this Content” button just above the content title.

CU PolicyPro > Model Policies > Administrative > Field of Membership

Search Model Content

Chapter 1000: Administrative
Chapter 2000: Operations
Chapter 3000: Accounting
Chapter 4000: Security
Chapter 5000: Asset/Liability Management
Chapter 6000: Investments
Chapter 7000: Lending
Chapter 8000: Other Real Estate Owned (OREO)

Import this Content

Field of Membership (1100.11)

Last Revised On: 06/30/2022

Model Content Revised Date: 6/30/2022

1. FIELD OF MEMBERSHIP
[[1150-1]]

2. VERIFICATION OF MEMBERSHIP ELIGIBILITY. [[CUname]] (Credit Union) will verify the eligibility of prospective members seeking membership with the Credit Union.

A. Occupation-Based (Select Employee Group) Eligibility. Employees, retirees

6. The imported section of content is now available in your CU Policies or CU BCP.