



# CU\*SPY e-Forms

## Programming Your Forms in CU\*BASE®

You have your equipment, your staff is mobilized and ready to go...now it's time to get those forms programmed so they can be produced from CU\*BASE and archived in the CU\*Spy vault. This document explains how it's done!

# 3



## CU\*ANSWERS

A CREDIT UNION SERVICE ORGANIZATION

6000 28th Street SE, Suite 100 • Grand Rapids MI 49546

P 616.285.5711 • T 800.327.3478 • F 616.285.1569

[www.cuanswers.com](http://www.cuanswers.com)

.....	
<b>Inside</b>	
In This Document	2
Timeline	3
Pricing	4
Decisions to Make	5
Form Type Worksheet	6-7
Defining Custom Text	8-9
Responsibilities	10
Our Promise to You	11
Definitions & Sample Paperwork	12-15
Learn More	16

December 16, 2010

# In This Document

“We promise we will respond, we will prioritize, and we will communicate with you.”

This document explains how Lender\*VP can take your credit union’s forms (the ones you purchase from a forms provider like Oak Tree or CUNA) and do the programming work needed so that data from CU\*BASE® can be placed onto the form and a completed form produced for printing and archiving in the CU\*Spy electronic documents vault.

If you use the CU\*Spy vault, forms you can have programmed for archival include:

- Generic CU\*BASE Loan Forms
- Custom Loan and Application Forms
- Membership Agreement (the “Signature Card”)

If the data needed on the form isn’t already part of the CU\*BASE database, then special screens will be developed so that your staff can fill in that additional data at the time the form is generated. If a member signature is needed on a form, then we’ll put in the proper hooks so that the ProDOC FORMS™ tool stops to allow a signature to be captured and stored with the form. And if you need to produce a certain group of forms at the same time, every time, we can even set up forms bundles to make the process easy and smooth for your loan staff.

Since there are several places in CU\*BASE where forms might be needed, this document helps you decide how each form will be used, where you might need to be able to access it, and how much it will cost and how long it will take to get the form ready to go.

Just getting started?  
Visit <http://edocs.cuanswers.com/> to learn more about CU\*BASE electronic document options, hardware required and the process of attaching signatures and archiving loan forms in the CU\*SPY vault.



# Timeline

Wonder why forms take the time they do? Listed below are all the steps each form goes through and the teams that work on each step.



*12 Steps...6 Teams...Your Forms Provider...and You.*

How do they fit together? Who does what? Here is an overview of each step and who is responsible.

1. Forms are requested by the CU. Lender\*VP is notified by the Conversion Team, Forms Provider, or other CU\*Answers representative.
2. The CU requests forms provider to send forms to Lender\*VP. **Receiving the files can take from 6 to 8 weeks.** *(That's why it's so important to request the forms early from your forms provider.)*
3. Lender\*VP receives the files, verifies the format is acceptable, then writes up a Bid Sheet and Authorization Form. (See samples on Pages 13 and 14.)
4. CU reviews the bid and returns a signed authorization form to Lender\*VP.
5. A Project Sheet is created, defining each form and how it needs to be programmed.
6. The files from the CU's forms provider are then modified to the type of files CU\*BASE or ProDOC needs for printing.
7. Files are loaded into CU\*BASE in their new format. The programmer then programs all fields that need to be displayed on each form. The more custom fields required, the longer the programming time. Mapping the fields is next. This is where the fields are lined up properly on the form itself.
8. With the programming complete, the forms go through Quality Control testing to verify that the data fields are correct and that field alignment is good.
9. After the first round of QC, the forms then go to our CU\*BASE GOLD development team to make the changes needed to CU\*BASE screens.
10. QC reviews the screen changes and verifies again that everything is correct.
11. Lender\*VP is notified that the forms and screens are ready to go. The files are configured in CU\*BASE.
12. WESCO *Net* Systems is sent the files and any CU\*BASE GOLD changes to push out to the credit union via the GUAPPLE device.

All in all, the entire process takes **10-12 weeks**, depending on the number of forms, the complexity, and how quickly we receive the files from your forms provider.

# Pricing

Following is current pricing for developing your loan forms. All pricing is as of **January 1, 2011**, and is subject to change.

## New Forms (standard or eDOC forms)

- Starting price is **\$257.00 per page**. Actual cost depends on form complexity (# of custom fields, etc.).
- If the form is more than one type of form (such as LN & AP) the cost is **regular price + 50%**.  
*For example, a 2-page document priced at \$500 for LN type + \$250 for AP type = Total cost of \$750.*
- Bundles (LN, AP, SH) start at **\$75.00 per bundle**.

## Existing Clients Switching to eDOC Forms

- Starting price is **\$154.00 per page**. Actual cost depends on form complexity (# of custom fields, etc.).
- Form switching to additional type (example, form is currently LN and now it needs to be AP), **add 50%** to original cost. *For example, if the LN cost was \$500, the AP will cost an additional \$250 for a total cost of \$750.*
- Bundles start at **\$75.00 per bundle**.

## Updates to Forms

Includes form revisions, regulatory changes, and other changes not caused/initiated by Lender\*VP. DOES NOT INCLUDE changes to the form layout itself. Any form layout change MUST be done by the form provider.

- Starting price is **\$103.00**. Actual cost will be determined by the amount of programming involved and the number of pages needing modifications.
- Changes to bundles is **\$75.00**, unless forms need to be recreated as LN or AP.

## Modifications Caused/Initiated by Lender\*VP

Examples include misaligned information, data fields incorrect or missing, verbiage not displaying properly. DOES NOT INCLUDE changes to the form layout itself. Any form layout change MUST be done by the form provider.

- No charge if reported within the first 30 days after deployment; after 30 days the "Updates" pricing shown above will apply.

.....

## Credit Union Acknowledgment

I understand and agree to the pricing outlined above and understand that if any issues with my forms are due to Lender\*VP/CU\*Answers, I have 30 days from delivery date to report it, after which the issues will become billable. I also understand that if I make changes to any form I have requested, there could be charges involved.

Credit Union Name \_\_\_\_\_

Name and Title of Credit Union Rep \_\_\_\_\_

Email Address \_\_\_\_\_ Phone \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

# Decisions to Make

What kind of form do I need?  
Where do I need to be able to print it?  
When do I need to print it?  
What is the form used for?



## Figuring Out The Form Types You Need

**When is a form *more than one* form? When you need to print it at more than one stage in the loan process, or when it needs to be printed via multiple CU\*BASE menu options.**

Some loan forms need to be printed only when a loan is closed (booked), while others might need to be printed during the application process for verification with the member, then again after the loan is booked for final authorization. In that case, you actually need to have two forms programmed in CU\*BASE.

For each form that needs to be processed by CU\*Answers, choose one or more of the following options (use the worksheet shown on Pages 7-8 to organize all of your forms):

- I need to be able to print this form when closing (booking) a loan—**LN form type**
- I need to be able to print this form when printing an application, prior to closing the loan—**AP form type**
- This is my Membership Agreement (Signature Card) form —**SH form type**

NOTE: While you might have other SH types, at the current time we warrant only the inclusion of one share type form—your membership agreement (sometimes referred to as a signature card)—for storage in the CU\*Spy vault. Any other SH forms you ask us to program cannot be stored electronically unless you have your own vault.

Remember that for each box you check, we have to develop separate programs in order to produce that form from the appropriate location in CU\*BASE. This will result in additional cost to your credit union (see Pricing on Page 4). It is common for a single loan form to be *two* form types. Each type is considered a separate form for the purposes of programming it.

*For example, say you have a two-page Mortgage form. It may be listed on the bid sheet for \$500. However, if that same Mortgage form is a Loan (LN) type AND an Application (AP) type form, it may be listed on the bid for \$750 ( $\$500 + 50\% = \$750$ ).*

Thinking these choices through very carefully will help ensure that your forms will be set up properly and that they can be printed from the correct menu in CU\*BASE.

## Other Decisions

You're not done yet! Use the form on the next page to make your choices, then proceed to Pages 8-9 to define custom text that appears on certain types of forms. **NOTE: If you need other custom text to appear anywhere else on your form(s), please attach a separate page detailing exactly what text you need and where it should be placed.**

# Form Type Worksheet

To help you organize the types of forms you will need, use this worksheet for multiple form types. Please return to your Conversion Coordinator or fax the completed form to **616.285.1569**.

## Loan and Application Forms

Form Name/Description	LN Type Print/Archive When Closing (Booking) a Loan	AP Type Print/Archive During the Loan App Process
Generic CU*BASE 5-page Loan Application	n/a	<input checked="" type="checkbox"/>
Generic CU*BASE Short Form Loan Application	n/a	<input checked="" type="checkbox"/>
Generic CU*BASE Loan Officer Worksheet	n/a	<input checked="" type="checkbox"/>
Generic CU*BASE Loan App Denial Notice (for loan denials only)	n/a	<input checked="" type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
<div data-bbox="568 1186 938 1423" style="border: 1px solid gray; padding: 5px; background-color: #f0f0f0;"> <p>Submit this form electronically!            Visit <a href="http://lendervp.com/tools/forms/">http://lendervp.com/tools/forms/</a> to fill this in and submit it electronically to our team!</p> </div>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

continued on next page >>

More Loan and Application Forms

LN Type

AP Type

Form Name/Description	Print/Archive When Closing (Booking) a Loan	Print/Archive During the Loan App Process
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

Other Forms

SH Type

Form Name/Description	Print and Archive	Print Without Electronic Archival
Membership Agreement Form ("Signature Card")	<input type="checkbox"/>	<input type="checkbox"/>
	n/a*	<input type="checkbox"/>
	n/a*	<input type="checkbox"/>
	n/a*	<input type="checkbox"/>
	n/a*	<input type="checkbox"/>

\*Not available if archiving to the CU\*Spy vault.

.....

## Credit Union Acknowledgment

These forms have been reviewed and the summary of form type definitions is correct. Please create a Bid Sheet using the information that has been provided here. If there is an error in definition and the error is found at a later date, I understand that there may be additional charges to rectify the situation.

Credit Union Name \_\_\_\_\_

Name and Title of Credit Union Rep \_\_\_\_\_

Email Address \_\_\_\_\_ Phone \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

# Defining Custom Text

There are certain loan forms with areas where CU-defined text can be inserted. Use the form below to specify what verbiage we should place into those areas on these special forms. (If any of these areas are not used, please write N/A so we know that you do not need it.)

## Loan & Security Agreement and Disclosure Statement

Late Charge  
Verbiage:

Collection Costs  
Verbiage:

## Guaranty Agreement

Custom  
Verbiage:

continued on next page >>

## Disbursement Receipt

Complete the following if you wish to place an asterisk (\*) in the "Payment Amount" section of the Repayment Terms and include the following language in the open area.

### Balloon Verbiage:

\*You agree to make \_\_\_\_\_ payments of \$\_\_\_\_\_ due on the \_\_\_\_\_ of each \_\_\_\_\_. followed by one single balloon payment which will be due on \_\_\_\_\_. The amount of the balloon payment will include the principal amount that is outstanding, all accrued interest, plus any other costs, including credit insurance premiums, that you owe.

### Single Payment Language:

\*You agree to make one payment for this advance on \_\_\_\_\_ of \$\_\_\_\_\_, plus interest and any other costs including credit insurance premiums, from the date of this advance to the date payment is made.


### Custom Insurance Verbiage:

If you are totally disabled for more than \_\_\_\_\_ days, then the disability benefits will begin with the \_\_\_\_\_ day of disability.

## Modified APR

Do you use modified APR?  YES  NO

Do you want Modified APR to appear on forms?  YES  NO



Submit this form electronically!  
Visit <http://lendervp.com/tools/forms/> to fill this in and submit it electronically to our team!

**If you need other custom text to appear anywhere else on your form(s), please attach a separate page detailing exactly what text you need and where it should be placed.**

.....

## Credit Union Acknowledgment

This custom text has been reviewed and is correct. I understand that if there is an error in definition and the error is found at a later date, I understand that there may be additional charges to rectify the situation.

Credit Union Name \_\_\_\_\_

Name and Title of Credit Union Rep \_\_\_\_\_

Email Address \_\_\_\_\_ Phone \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

# Responsibilities

Programming your forms is a team process, and you are a big part of that team. Deadlines are tight, so we can't do this without the support and cooperation of everyone at the credit union who will be defining and testing your forms!

## How To Get Help

If you have a problem with one of your forms, contact a CSR at **800.327.3478** or via email to **csr@cuanswers.com**. They will collect information about your issue and then open an incident so we can track it in our system until it's resolved. Once an incident is opened it will be routed and escalated accordingly depending upon the particular issue and its urgency. Help is available 24/7 depending upon the severity of the issue.

What we will need from you:

- A detailed description of the issue (we may ask for you to fax us a copy of a document that shows the issue, if possible)
- Information about the scope of the issue (Does it affect one workstation only? One branch only? All branches?)
- When does it happen? (All the time? Once in a while? Only under certain conditions?)
- When did it start happening? (Just now? After a CU\*BASE GOLD update? Once we updated ProDOC? After your programming request for a new form was deployed?)

## Credit Union Responsibilities

1. It is your credit union's responsibility to fill out the Form Worksheet and specify your Custom Text to the best of your ability and return it to either your Conversion Coordinator or fax it to (616) 285-1569.
2. Your credit union is responsible for contacting your forms provider and making sure all form files are sent to us.
3. Once the Bid Sheet and Authorization Form is received by your credit union, you have 10 days to review and fax it back to Lender\*VP.
4. After programming is complete and you have received the Acceptance Letter, you have 30 days to verify that all forms are correct; changes made after 30 days (for any reason) will incur additional charges.



## Lender\*VP Responsibilities

1. We will ensure the forms are created properly to work within CU\*BASE.
2. We will make sure all data is in the correct area and aligned properly.
3. We will test every form to verify the quality of the form with data populated.
4. We will check each CU\*BASE GOLD screen so all screen fields are available.
5. We will load the files into CU\*BASE for deployment.

# Our Promise To You

## Our Promise to You



### We Will...Prioritize Your Issues

If you experience a problem with any of your forms, Lender\*VP will review and prioritize issues using a three-level system:

- Level 1:** Urgent and business-critical. These are issues such as a system-wide problem where there is no workaround and it is preventing business from occurring.
- Level 2:** These are issues that are important or are causing an inconvenience but there is a temporary workaround.
- Level 3:** These are issues that are cosmetic; changes that are not causing compliance issues presently or are preference-type issues.

### We Will...Respond and Communicate With You

**For Level 1 Issues:** We will provide a contact name for the person who will be managing your issue. This person will be in regular contact to keep you apprised of the situation.

**For Level 2 and Level 3 Issues:** We will communicate with you on what the Project # is and the estimated timeframe for completion (2 weeks to 12 weeks depending on complexity). If at any time you would like a status update for your project, you can contact any CU\*BASE Client Service Representative.

### We Will...Explain How Requests Will be Billed

Remember you will always have 30 days to approve changes. We will always quote your change and give you the opportunity to approve the quote before beginning work. The decision as to whether or not your particular repair will be billable will be evaluated on a case-by-case basis depending on the issue and surrounding circumstances.

# Definitions

## Form Types

An individual form can actually be more than one type, and pricing is different depending how many types you need for a particular form.

Application Form (AP)	A form that is printed before the loan is booked. A form can be set up for use in both the application process and the loan closing process.
Loan Form (LN)	A form that is used to close (book) the loan. The form itself is printed right before closing. At times, the same form can also be set up for use as an application form.
Share Form (SH)	A form that deals with any type of share membership account. This would include CDs, IRAs, checking account, savings account, account cards, etc. <b>Remember that currently <u>only your membership agreement (signature) card form is warranted for inclusion in the CU*Spy vault.</u></b>

## Other Terms to Know

Bundle	A bundle is a package of forms defined by you. Each form listed in the bundle will print one after another, automatically.
Bid Sheet	Lender*VP uses this sheet to outline what forms will be created, including Form Type, number of pages, and cost.
Authorization Form	Lender*VP sends this form explaining how many forms or fixes are needed and a total cost of the forms/fixes. A project sheet can only be created after Lender*VP receives this form back with a valid signature, date, email and contact phone number listed.
Acceptance Letter (Sign-Off Sheet)	This is sent to notify you that your forms are ready for review. At this point you need to verify all fields and verbiage on the forms for accuracy. There is no charge for changes requested during this review period. <i>NOTE: This excludes changes to Form Type (where the form is printed from). Example, if you asked for the form to be created as a Loan (LN) form only and now you want it as an Application (AP) form as well, there will be additional charges. Additional changes also may apply to other out-of-the-ordinary requests.</i>
Forms Provider	A third-party vendor from whom the credit union buys its forms. The forms provider MUST provide Lender*VP with files for the forms, requested by the credit union. Examples of providers include CUNA, Oak Tree, Securian, WCUL, and Conmar.
Generic Forms	Forms that Lender*VP provides at no cost. These forms cannot be altered in any way.
Standard Form	A form that prints directly from CU*BASE to a laser printer. There is no storage of the form electronically.
Electronic Form	A form that looks exactly like the standard form, but prints from CU*BASE to the ProDOC software, where electronic signatures can be added before printing. These forms are stored electronically in a vault of the credit union's choice. Electronic forms of this type are referred to as eDOC forms.

# Bid Sheet

Once your worksheet has been completed, and we have received the files from your forms provider, we write up a Bid Sheet listing each form with pricing details. This is sent to you along with the Authorization Form (see Page 14 for a sample).

## Laser Form Programming Proposal

ABC Credit Union  
 Date Submitted: 2/13/2009  
 Submitted By: Barbara Kula

Item	LN/AP	Form Provider	Form Number/Title	Description	# of Pages	Cost
1	LN/AP	Oak Tree	OTBS 020	Credit Line acct H/E Secured O/e Credit Agreement & TILD	2	\$ 375.00
2	LN/AP	Oak Tree	OTBS 022EE	Settlement Statement HUD-1A	2	\$ 375.00
3	AP	Oak Tree	OTBS 022CC	Good Faith Estimate	3	\$ 250.00
4	AP	Oak Tree	OTBS 021	Important Terms of our Home Equity lines of Credit	4	\$ 250.00
	AP	Oak Tree	OTBS 095B	Notice of Right of Rescission	2	\$ 250.00
	AP	Oak Tree	OTBS 087	Notice to The Home Loan A	1	\$ 250.00
	AP	Oak Tree	OTBS 022DD	Servicing Disclosure Statemen	1	\$ 250.00
	AP	Oak Tree			1	\$ 250.00
	AP	Oak Tree		licati	2	\$ 500.00
	LN	Oak Tree		the Line	5	\$ 250.00
	LN	Oak Tree	OTBS 092	TO be Completed by Applicant	1	\$ 250.00
	LN	Oak Tree	OTBS 091	Standard Flood Hazard Determination Form	1	\$ 250.00
	LN	Oak Tree	OTBS 091A	Flood Insurance Notice	1	\$ 250.00
	LN	Oak Tree	OTBS 122	Note & Federal Disclosure Statement for Loans Secured by R/E-fixed	2	\$ 250.00
	LN	Oak Tree	UT 093A	Utah c/e Deed of Trust/Mortgage	15	\$ 250.00
	LN	Oak Tree	UT 093	Utah O/E Home Equity Security Instrument (Trust Deed)	15	\$ 250.00
<b>Totals</b>					43	\$ 4,250.00

Notice some forms are being created as multiple form types

Cost depends on how many form types we are setting up

# Authorization Form

This will be sent to you at the same time as the Bid Sheet.



## Technical Services Special Project Request / Authorization

Date of Request: 2/13/10 Project # \_\_\_\_\_  
Credit Union Name: ABC Credit Union Phone: \_\_\_\_\_  
Contact Name: \_\_\_\_\_ Fax: \_\_\_\_\_  
CU\*Answers Contact: \_\_\_\_\_ Phone: **616-285-5711 ext 245**  
Email: \_\_\_\_\_

*This document must be completed in order to authorize requests for special services, such as custom programming or database manipulation. For our self processing clients, this form must be completed to approve requests for on-site technical support visits for hardware or software upgrades, system configuration, and the like.*

### Part 1 - Request Details

*Please describe the project request in detail, including any date requirements:*

**Programming and mapping for new custom standard loan forms**

Part 2: Pricing Quote

*After researching the above request, we are pleased to quote the following costs for this project. Pricing and time estimates are valid only if approval is received on or before: 2 / 28 / 10.*

Description	Fee	Comments
Programming and Mapping	\$ 4,250.00	
	\$	
	\$	
	\$	

Quoted by: Barb Kula, CU\*Answers

### Part 3 - Authorization to Begin Work

*Please review this information carefully, then sign and return a copy of this form indicating your approval of the terms and details specified. Work will not begin until we receive your signed approval. If you have any questions or wish to clarify any portion of the specification, please contact us at the number indicated above. Thank you and we look forward to working with you on this project!*

The quotation and specifications for the project outlined above are approved.

Credit Union Representative: \_\_\_\_\_  
(please print)

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**Sign and return promptly so work can begin!**

**Fax the signed copy back to fax # 616.285.1569**

# Acceptance Letter

The Acceptance Letter is sent as notification that your project has been completed and your forms are ready for your review. Once all forms are verified by the Credit Union, the CU rep needs to sign and return this letter before your forms can be implemented.

## Acceptance Letter of Forms

CU\*Answers, 6000 28<sup>th</sup> Street, Grand Rapids, MI  
Phone: (616) 285-5711  
Fax: (616) 464-2622

2/16/2010

ABC Credit Union

Dear John:

I want to thank you for giving CU\*Answers the opportunity to provide you with system generated forms. We're confident that the forms provided will help you in your business and will tie in seamlessly with the products and services that you already provide your members. Below is a list of forms that have been programmed by the CU\*Answers team for your credit union. Please complete all areas of a form and print off each form from the location in CUBASE you will be using it (loans, application and deposits) and review each field carefully. If you find the form to be acceptable, please initial and date next to the title of the form. If you find an area that isn't correct, please mark the area and make a note next to it, describing what needs to be changed. Fax completed form to 616-285-1569.

Any issues found will be fixed within a 2 week period from the reported date.

FORM NAME	SYSTEM SHORT NAME	FORMS PROVIDER	FORM ID	ACCEPTANCE
Mortgage	MORT	Conmar	13344-1	
Mortgage- MI Fannie May	MIMT	Conmar	13344-2	

**Don't forget to initial each individual form here!**

Any correction or modification requested in the first 30 days after deployment will be free of charge. After 30 days, you will incur charges to make any type of change or correction.

By signing below, you understand that you have 30 days to review all forms delivered, after which time charges will be incurred, regardless of the type of change.

Credit Union Representative: John Doe

Signature \_\_\_\_\_

Title \_\_\_\_\_

Date \_\_\_\_\_

Please keep a copy of the acceptance form for your records.

**Your signature here means we've completed your forms to your satisfaction!**

# Learn More



Now that you know about the Lender\*VP forms process, what questions can we answer for you? Make a list and contact us. We will be happy to assist you with getting started with programming your forms!

## New to CU\*BASE?

If you are just converting to the CU\*BASE platform, we will make every effort to have your forms ready for your training sessions, if possible, so that you can practice generating forms. **That's why it's important that you contact your forms provider as early in the process as possible.**

Take care when filling out the Forms Worksheet and Defining Custom Text form (see Pages 6-9) to ensure your forms read the way you want them to and that they can be printed from the correct locations in CU\*BASE.

If you have questions about how your forms project is going, please contact your Conversion Coordinator. We will also work with your assigned conversion trainers to resolve any outstanding issues with the forms that come up during your training.

Call a Client Service Representative  
**800-327-3478 > option 2**



Email Us  
**edocs@cuanswers.com**



Fax Completed Paperwork To  
**616-285-1569**



 Submit Our Setup Forms  
Electronically  
**<http://lendervp.com/tools/forms/>**