



CREDIT UNION ONLINE

FREQUENTLY ASKED QUESTIONS

1. What is Credit union Online?

Credit union online or CU Online is the online system for submitting quarterly call report data and profile data.

2. What is the Credit Union Profile?

The CU Online profile includes information that NCUA maintains about a credit union that is infrequently changed. For example, it contains:

- Credit union address(es),
- Phone number(s),
- List of officials,
- Hours of operation,
- Information systems and technology,
- Services provided to members, and
- Other similar information.

3. Where do I report my branch information?

The branch information is included in the Profile under the Contacts section. NCUA requires credit unions to report all branches.

4. What is “Save and Certify Profile?”

After making any changes to your credit union’s Profile, NCUA requires you to click the “Save and Certify Profile” button to certify the change(s) you made and permanently save your changes. If you leave the Profile, close your browser, log out, or do not click the “Save and Certify Profile” button, you will lose all changes.

5. Am I required to use the online system?

Yes. NCUA requires all federally insured credit unions to submit data online.

6. What if I am having a problem with CU Online?

Technical support is available by phone at (800) 827-3255 and (703) 518-6450 or via email at csdesk@ncua.gov. Technical support is available from 7:00 AM to 8:00 PM, Eastern Time, Monday through Thursday, and 7:00 AM to 6:00 PM on Friday (Closed on government holidays).

7. Can other credit unions or the public see my information?

Public users going to the NCUA website, such as other credit unions, will only have access to public information.

8. What if I do not submit my call report on time?

If you submit your call report after the 11:59:59 Eastern Time deadline on the specified due date, *you may be subject to civil money penalties.*



CREDIT UNION ONLINE FREQUENTLY ASKED QUESTIONS

9. Will NCUA notify credit unions when the Call Report is due?

NCUA will send an NCUA Express email to all CU Online users each cycle outlining the start and end dates of the cycle. NCUA requires credit unions to submit a Call Report approximately three weeks after the end of the Call Report cycle.

The Call Report/Profile deadline is 11:59:59 Eastern Time on the fourth Friday of the month after the quarter closes. If the quarter closes on 30 June, then at 11:59:59 Eastern Time on the fourth Friday of July is when the call report is due.

10. Is there a how to video?

You may watch a YouTube video to learn how to submit your Call Report and Profile forms successfully. The video is located at:

<https://www.youtube.com/watch?v=fyzeeT7xH88>.

11. My data processing vendor prepares Call Report data for me. Will NCUA provide information for software vendors?

Yes. NCUA provides account information and sample XML files for vendors who develop software for importing Call Report data into CU Online. NCUA posts this information on NCUA's website in the Credit Union Online section. Credit unions cannot import Profile information.

12. Can a Board Member have access to the system as a back-up to me?

Yes. NCUA requires credit unions to have at least two administrators. We recommend credit unions have at least one back-up for completing the Call Report and maintaining the Profile information. Credit Unions may have multiple user accounts.

13. What if I need to make a correction to a previously submitted Call Report?

Credit unions may correct Call Reports in the CU Online system for the most recent 16 cycles.

14. Can I save my work and come back to complete it later?

Yes. You can start your Call Report, save your work, log off, and return later. You cannot submit your Call Report until you complete all required information, correct errors, accept warnings, and provide comments.

15. Can I print a blank Call Report form and instructions?

Yes. You can click "Instruction" button in CU online and from NCUA's website at: <http://www.ncua.gov/DataApps/Documents/CRF201409.pdf>

16. Can I limit who can submit the Call Report if my credit union has more than one CU online user?

No. CU Online Users with the "Credit Union Administrator" and "Credit Union User" role can add and update all portions of the Profile and Call Report. CU Online users assigned the "Credit Union Basic" role have view only permissions for the entire system. Credit unions need to decide whom they assign the roles to.



CREDIT UNION ONLINE FREQUENTLY ASKED QUESTIONS

17. Will examiners and State Supervisory Authorities still conduct a quality audit check of the Call Report?

Yes. For federally chartered credit unions, the assigned NCUA examiner will review and validate the submitted Call Report information. The respective State Supervisory Authority will review and validate the Call Report data submitted by state chartered credit unions.

18. How will I know if my call report uploaded successfully?

NCUA confirms successful submission of Call Report/Profile forms with an email bearing the time and date of successful submission. A second email has the date and time stamp for the submission and has an FPR attached.

19. Can I save a copy of what I submitted for the profile or call report or both?

Users can save a PDF of their call report or profile at any time.

20. What is Silverlight?

Silverlight is a free program browser add-on from Microsoft. If you do not have Silverlight installed on your computer, the system will prompt you to install it the first time you access CU Online. Installing the Silverlight plug-in requires administrator privileges to your desktop. You may download and install Silverlight at: <http://www.microsoft.com/getsilverlight/Get-Started/Install/Default.aspx>