

NCUA CUSO Registry Quick Start Guide

Amend a CUSO Record

Last Updated: 22-August-17

About Amending a CUSO Record Step 2: Amend CUSO To initiate an amendment to your CUSO, locate the blue These steps apply to CUSOs that need to amend a record that Amend button on your CUSO details page. has been certified and submitted or cancel an amendment started in error. CUSO administrators and contributors can update their registered CUSO's information at any time (excluding EIN and Registry Number). 1. Click Amend CUSO. CUSO Example 01 List of CUSOs Step 1: Navigate to CUSO List Registry Number Certified By Date Certified Status Year 111-0000057 Ann Belair Registered 01/17/2017 2016 Download CUSO (Excel) -To begin, log in to your CUSO account. General Information Services Customers Owners Financial Audit Information Account Users 1. Open a Web browser and navigate to the <u>CUSO Registry</u>. **CUSO's Information** 2. Log in to your CUSO account. 11-8372929 FIN Do you have a user account? Type of Legal Organization Yes, I have a user account. Does a corporate CU or a corporate CU's No Great! Please login. CUSO have an investment in your organization? Username Return to CUSO Details Password **General Information** Remember Me Amendment Process * Required CUSO General Information 111-0000044 Registry Number Login Services 56-5656565 EIN* Additional Service Information Forgot your username or password? 🖉 CUSO Legal Name* CUSO Ex Customers From the CUSO List, select the CUSO you need to amend. 3. Owners Type of Legal Organization* Corporatio Financial Audit Information **CUSOs** Yes Does a corporate CU or a corporate Certify and Submit Show 10 entries CU's CUSO have an investment in your organization?* Next auto save in: 9:43 Save Now cuso 1ª Registry Number 🕼 City 🔰 State Status 🗍 Region 2. Click on the tab for the section you need to amend CUSO Example 111-0000055 Stafford VA 2 Registered Showing 1 to 1 of 1 entries The CUSOs record will display on the next page.



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Step 2: Amend CUSO (Cont.)

Note: If you navigate using the tabs on the left, you will see a message stating, "Are you sure you want to navigate away? Any unsaved changes will be lost. To save your changes, click Save now located on the left side of the page, or Continue located at the bottom of the page.

| REGISTRY Return to NCUA.gov | Are you sure you want to navigate away? Any unsaved changes will be lost. To save your changes, click Save Now located on the left side of the page, or Continue located at the bottom of the page. | | | | | |
|--------------------------------|---|--------------------|-------|--------------|-----|--|
| | | | | No | Yes | |
| Return to CUSO Details | | | | | | |
| Amendment Process | Gen | eral Informa | ation | | | |
| CUSO General Informatio | * Require | d | | | | |
| Servic | s 🖌 Registry | Number | | 111-0000044 | | |
| Additional Service Information | n 🖌 | | | | | |
| Custome | s 🖌 🛛 EIN* | | | | | |
| Owne | s 🖌 | CUSO Legal Name* | | CUSO Example | | |
| Financial Audit Information | n 🖌 | | | | | |
| Certify and Subr | it Type of L | egal Organization* | | Corporation | | |
| Next auto save in: 8:43 Save N | ow | | | | | |

Note: If you change your CUSO from non-Corporate to Corporate on the General Services page, you might see the Financial Audit Information tab appear, if it is not already on your page tree. Additionally, if you add services on the Services page that are high-risk and complex, you may see the Additional Service Information and Financial Audit Information tabs appear, if they are not already on the page tree. You will need to complete the information required on these pages to certify and submit your amendment.

Step 3: Certify and Submit

In order for your amendment to save and be reflected in your 2016 CUSO record, you must Certify and Submit your changes. Go to the Certify and Submit page. Check Yes next to "Yes, I certify that the information provided is current and accurate." A Certify and Submit button will appear. Click Certify and Submit to submit your Reaffirmation data.

| 🗹 Yes, I ce | rtify that the information provided is current and accurat |
|-------------|--|
| Back | Certify and Submit |
| | and Cuby itting the American set you and |

After Certifying and Submitting the Amendment, you can save your submitted information in an Excel sheet for your records by clicking **Export 2016 Registration.** Make sure you keep an up-todate and accurate record of your currently submitted CUSO information.

Step 4: Verify Amendment

To check your amendment information, open the excel sheet by clicking Export 2016 Registration. Verify the information rendered is the information you entered during the Amendment process. When the excel sheet opens, choose the section you would like to view from the Table of Contents.

| Table C | Of Contents: |
|---------|----------------------------|
| | General Information |
| | <u>Services</u> |
| | <u>Customers</u> |
| | <u>Owners</u> |
| | Financial Information |

You can also verify your Amendment by returning to your CUSO list. Click on the CUSO whose record you just Certified and Submitted. Click on the tab of the section you amended, and check that the information rendered is accurate.









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| Step 5: Cancel Amendment | | | | | | | | |
|---|---|---------------------------|---|----------------|---|--|--|--|
| Cancel Amendment allows the user to cancel an amendment started in error. | | | | | | | | |
| Select your CUSO from the CUSO List Select the Cancel Amendment in upper right corner of the CUSO details page | | | | | | | | |
| CUSO Examp | ole 01 | | | | | | | |
| Registry Number | Certified By D Ann Belair 0 | ate Certified | Status Registered (Reset to Credentialed) | 2016 | Cancel Amendment Complete Amendment Download CUSO (Excel) - | | | |
| General Information | Services Custor | mers Owners | Financial Audit Information | Account Users | | | | |
| CUSO's EIN Type of Legal Does a corpo CUSO have a organization? | nformation Organization ate CU or a corpora n investment in your | 11-5 te CU's No | 1281711 | | | | | |
| Mailing Addre | 55 | 100 Stat | Duke St ford, VA 22556 | | | | | |
| 3. The cates | Amendm the am | nent Bu endmer | tton will no l nt is cancelled | onger ap I. | pear which indi- | | | |
| Registry Number | Certified By Ann Belair | Date Certified 01/27/2017 | Status Registered | Year 2016 | List of CUSOs | | | |
| | | | (Reset to Credentialed) | | Download CUSO (Excel) • | | | |
| General Information | Services Cus | tomers Owner | s Financial Audit Information | Account Users | | | | |
| CUSO | s Information | 1 | 1.8281711 | ₽ | | | | |
| Type of Le | gal Organization | | | | | | | |
| Does a co CUSO hav organizatio | porate CU or a corp e an investment in y n? | orate CU's N our | 10 | | | | | |
| Mailing Address | | 1 | 00 Duke St | | | | | |
| | | 8 | lattori VA 22856 | | | | | |
| | | | | | | | | |

