

Learning Plans

Credit union-specific learning plans guide your career path

Choose one of these credit union positions that fits your educational needs:

- Accounting Clerk
- Branch Manager
- Collector
- Compliance Officer
- Loan Officer, Loan Processor, or VP Lending
- Marketing Manager
- Member Service Representative
- New Employee Orientation
- Teller, Head Teller, or Teller Manager

Start with the core competency courses which provide the base for your learning adventure. Continue your professional development with the specialized courses specific to each position. The completion of a learning plan ensures you have the skill set and knowledge to succeed. Be sure to check out the recognition options. Many courses offer certificates, designations, or college credit to document your educational experience.

CORE COMPETENCY COURSES

| Course Title | Online | Print | Course Title | Online | Print |
|--|--------|-------|---|--------|--------|
| BANKRUPTCY | | | MARKETING | | |
| <input type="checkbox"/> Bankruptcy and Court Proceedings | | \$400 | <input type="checkbox"/> Developing Retail Marketing | | M28 |
| OR | | | MEMBER SERVICES AND ACCOUNTS | | |
| <input type="checkbox"/> Bankruptcy | A1006 | | <input type="checkbox"/> Member Relations | \$20 | \$20 |
| COMPLIANCE | | | <input type="checkbox"/> Money and Negotiable Instruments | \$100 | \$100 |
| <input type="checkbox"/> RegTraC Level 1, Module 2 | | 22691 | <input type="checkbox"/> Member Services | \$110 | \$110 |
| OR | | | <input type="checkbox"/> Opening New Accounts | \$800 | \$800 |
| <input type="checkbox"/> Bank Bribery Act | R102D | | <input type="checkbox"/> Professional Member Service | A1005 | SI308 |
| <input type="checkbox"/> Bank Secrecy Act | R102A | | SALES | | |
| <input type="checkbox"/> NCUA Privacy Regulation | R102H | | <input type="checkbox"/> Credit Union Sales | A1002 | SI305 |
| <input type="checkbox"/> OFAC - Office of Foreign Assets Control | R102B | | <input type="checkbox"/> Cross-Selling | SI20 | SI20 |
| <input type="checkbox"/> RegTraC Level 1, Module 3 | | 22692 | <input type="checkbox"/> Improving and Maintaining Quality Service | \$500 | \$500 |
| OR | | | <input type="checkbox"/> Leading and Managing Credit Union Sales | | M16 |
| <input type="checkbox"/> Reg B - Equal Credit Opportunity Act | R103F | | <input type="checkbox"/> Managing Financial Education Programs | | M30 |
| CREDIT UNION ORIENTATION | | | SECURITY | | |
| <input type="checkbox"/> Introduction to Credit Unions | A1004 | SI304 | <input type="checkbox"/> Online Security | | M36 |
| HR STAFFING AND THE LAW | | | <input type="checkbox"/> Preventing Fraud | \$900 | \$900 |
| <input type="checkbox"/> Employment Law and Preventing Sexual Harassment | M13 | M13 | <input type="checkbox"/> Recognizing Emerging Fraudulent Practices | A1015 | SI1317 |
| <input type="checkbox"/> Workplace Diversity | M12 | M12 | <input type="checkbox"/> Robbery Prevention and Preparation | SI320 | SI320 |
| INTERPERSONAL SKILLS AND CAREER BUILDING | | | <input type="checkbox"/> Security | S30 | S30 |
| <input type="checkbox"/> Business Communication Skills | A1003 | M37 | <input type="checkbox"/> Security Administration | | M24 |
| <input type="checkbox"/> Communications and Telephone Skills | SI303 | SI303 | <input type="checkbox"/> Security Issues | \$910 | \$910 |
| <input type="checkbox"/> Develop a Career Plan | SI000 | SI000 | <input type="checkbox"/> Security Procedure Protocol | A1008 | SI309 |
| <input type="checkbox"/> Helping Members Understand and Solve Problems | SI110 | SI110 | TECHNOLOGY | | |
| <input type="checkbox"/> Interpersonal Skills: Understanding Your Effect on Others | M15 | M15 | <input type="checkbox"/> Credit Union Technology | \$600 | \$600 |
| <input type="checkbox"/> Make Work Manageable | SI020 | SI020 | <input type="checkbox"/> Managing Technology | | M20 |
| <input type="checkbox"/> Write Effectively | SI010 | SI010 | <input type="checkbox"/> Serving Members with Technology | \$620 | \$620 |
| MANAGEMENT SKILLS AND MANAGING EMPLOYEE PERFORMANCE | | | <input type="checkbox"/> The Critical Role of Technology in Credit Unions | A1009 | \$630 |
| <input type="checkbox"/> Resolving Employee Conflict | A1016 | M38 | <input type="checkbox"/> Using Technology to Improve Member Service | SI120 | SI120 |
| OR | | | | | |
| <input type="checkbox"/> Managing Conflict | M14 | | | | |

Editions and formats are updated frequently. Visit training.cuna.org for the most current information.



Credit Union National Association

Specialized courses for each credit union position

Add these courses along with the core competency courses to complete your learning plan.



COLLECTOR

| Course Title | Online | Print | Course Title | Online | Print |
|--|--------|-------|---|--------|-------|
| ACCOUNTING, BUDGETING, AND FINANCE | | | LENDING AND LOAN PROCESSING | | |
| <input type="checkbox"/> Reconciling Records | A1013 | S1315 | <input type="checkbox"/> Loan Interviewing | S700 | S700 |
| BANKRUPTCY | | | <input type="checkbox"/> Loan Servicing | S720 | S720 |
| <input type="checkbox"/> Bankruptcy and Court Proceedings | | S400 | <input type="checkbox"/> Maintaining Loan Documents | A1012 | S1314 |
| OR | | | <input type="checkbox"/> Mortgage Lending | S410 | S410 |
| Bankruptcy | A1006 | | <input type="checkbox"/> Preparing Loan Documents | A1011 | S1313 |
| COLLECTIONS | | | <input type="checkbox"/> Servicing Mortgage Loans | A1010 | S1312 |
| <input type="checkbox"/> Applying Collection Practices | A1014 | S1316 | <input type="checkbox"/> The Lending Process | S200 | S200 |
| <input type="checkbox"/> Collections | S220 | S220 | | | |
| <input type="checkbox"/> Successful Collections: Balancing Member Service and Credit Union Interests | S1310 | S1310 | | | |
| COMPLIANCE | | | | | |
| <input type="checkbox"/> RegTraC Level I, Module 1 | | 22690 | | | |
| OR | | | | | |
| Reg CC - Expedited Funds Availability and Collection of Checks | R101A | | | | |
| UCC Articles 3 and 4 - Law of Checking Accounts | R101F | | | | |
| <input type="checkbox"/> RegTraC Level I, Module 3 | | 22692 | | | |
| OR | | | | | |
| Fair Credit Reporting Act | R103D | | | | |
| Fair Debt Collection Practices Act | R103B | | | | |
| UCC Article 9 | R103A | | | | |

For more information or to order:

Visit: training.cuna.org and choose **Self-Study Certificate Programs**

Call: **800-356-9655, ext. 4072**

E-mail: elearning@cuna.coop