

Instructions for Creating and Uploading a Membership File

1. Create the File

Create the membership file, as outlined in Table 1, using your data processing software. Alternatively, your service provider may be able to create and upload this file on your behalf.

Table 1. Standard Member Data Elements Required

Field	Size	Type	Start	End	Comments	Specifications
Credit Union Name	27	a/n	1	27		<ul style="list-style-type: none"> • One member name per line. • Exclude <ul style="list-style-type: none"> ○ Foreign addresses ○ Military addresses (APO/FPO) ○ Deceased accounts ○ Closed accounts ○ Opt out accounts ○ Charged-off accounts ○ Trust accounts • Fixed Width (.txt) files are preferred • We will accept <ul style="list-style-type: none"> ○ Encapsulated csv ○ Tab delimited ○ .dif ○ .xls or .xlsx • Left justification • Adobe Acrobat (.pdf) files are not acceptable
Savings Account Indicator	1	a/n	28	28	Y=yes, N=no	
Name	30	a/n	29	58	F,M,L	
Address line #1	30	a/n	59	88	Do not include foreign or APO/FPO addresses	
Address line #2	30	a/n	89	118		
City	28	a/n	119	146		
State	2	a/n	147	148		
Zip Code	9	n	149	157		
Social Security Number	9	n	158	166		
Birthdate	8	a/n	167	174	mmddyyyy	
Checking Account Indicator	1	a/n	175	175	Y=yes, N=no	
Member Enrollment Date	8	a/n	176	183		
Gender	1	a	184	184		
Phone #	10	n	185	194		
Email Address	50	a/n	195	244		
Other (Unique Identifier, segment code, etc.)	To end	a/n	245			

Important Note: Do **NOT** include account numbers! The following data must be included: share/savings account indicator, name, address, social security number, birthdate, share draft/checking account indicator, enrollment date, gender, and phone number.

2. Validate and Save File

Before submitting files, validate data accuracy and completeness to facilitate premier processing time upon receipt.

3. Submit the File via Secured Website

Upload the file to the secured website at: www.cunamutual.com/trc.

Protect one of your most valuable assets--your membership data -- by using our fast, easy, secure, low-cost transmission process. Secured file uploads provide highest available security, the most premier processing time upon receipt, and are easy to send.

Getting Help

If you need help or have any questions, please call the TruStage Information Center at 800.428.3932 ext. 6841160 to speak with a Data Analyst or email us at TruStageData@cunamutual.com.