Reference Guide
Employment Practices Risk Management

**Frequently Asked Questions About
The Online Resource Center
for Employment Practices Liability Policyholders
www.epl-risk.com**

As an Employment Practices Liability coverage policyholder[1], your credit union has exclusive access to tools and resources within CUNA Mutual Group's Employment Practice Risk Management Resource Center at www.epl-risk.com. These resources provide practical and actionable insights that can minimize potential loss exposures, human resources expenses, training costs, and attorney fees.

Use this reference guide to help answer your questions about registration, navigation and administration of the tools and resources available to your credit union.

Registration and Setup

1. Who should be selected as our credit union's Program Administrator?
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[1] *Employment Practices Liability coverage as part of the Management Professional Liability Policy or New York Special Insurance Package policyholders with Employment Practices Liability coverage.*

Training

Helpful Resources

800.637.2676   **CUNA MUTUAL GROUP**   **CUNAMUTUAL.COM**

Registration and Setup

1. **Who should be selected as our credit union's Program Administrator?**

   It is best to establish the site's Program Administrator as someone who will monitor site content, track use, and manage access rights for the credit union. Many credit unions select a manager that handles the human resources or risk management functions as the administrator.

   The individual who first registers will automatically receive the program administrator designation.

2. **Can our credit union have more than one Program Administrator?**

   Yes. You can create additional Program Administrators if desired. Remember that the program administrator has full access to the website and its resources.

3. **Where is my passcode?**

   Your credit union's passcode is assigned to you by CUNA Mutual Group. It was initially sent in a notification email to your credit union's primary contact for your CUNA Mutual Group policies. If you don't know your passcode and cannot locate your notification email, you can contact us at 800.637.2676, or by email at cuprotection@cunamutual.com, or ask your CUNA Mutual Group Risk Manager for assistance.

4. **Is the passcode needed after the Program Administrator completes the initial registration process?**

   No, the one-time-use passcode is only needed to initially register the website. During the registration process, you will set-up a username/password for future access to epl-risk.com.

5. **Are there any recommended steps to follow after registration?**

   Scan the site to get acquainted with what resources are available, where you find them, and who at your organization may need access to the resources and tools.

   Also, if you're the Program Administrator, you have the unique ability to develop and personalize the site as your credit union's employment practices hub. To do so, you will want to review the Control Panel tab for other optional website set-up options such as:

   - Defining user profiles

   - Adding or recruiting additional employee users at your credit union

   - Reviewing training modules and other learning tools

   - Accessing policies, procedures, forms, and the employee handbook

   - Adjusting training and notification settings such as due dates, staff notifications, and tracking results

   - Modifying the site with your organization's calendar events, notices, or uploading credit union content and documentation.

6. **How can I change my password (not passcode for registration)?**

- Select Control Panel>My Info

- Change your password and password clue

- Submit

7. **Why can't I register or why do I no longer have access?**

   Only those with an Employment Practices Liability policy[1] have access to this site. If you have this policy and still cannot access the site, this can happen occasionally due to firewall filters. Contact your credit union's IT department, and if the issue is determined to be related to the website itself, Contact CUNA Mutual Group at 800.637.2676, or by email at cuprotection@cunamutual.com.

8. **What is the Control Panel?**

   The Control Panel allows the credit union's Program Administrator(s) to customize content, add individual users, set-up user profiles, tailor training assignments, monitor training progress, and download usage reports for your credit union.

Training

9. **How do individual users access training assignments?**

- Select Training to see the lessons assigned and their due dates.

- Click the link to begin the lessons.

   Please note that each training module has several lessons that should be completed in order.

10. **What if I have a question about the training material?**

    You can submit a question to the trainer by clicking the "Ask the Trainer" link found at the bottom of each training screen.

11. How do I add other users?

There are multiple ways to add users:

- Recruit new users via email:

    o Go to Control Panel>Users>Recruit New Users

    o Fill in the email addresses of those you wish to register – separate email addresses with a comma (i.e. John@email.com, Judy@email.com)

    o Add your own comments under Additional Message; Note: It is recommended to add comments clarifying why he/she is being asked to register for access to the site. In addition, you will want to add your name, since this message will come directly from epl-risk.com and not include your contact information.

    o Click Submit to send the emails.

- Add new users individually:

    o Go to Control Panel>Users>Add/Edit Users>Add New User

    o Complete the New User form (required fields are indicated by an asterisk*)

    o Submit

    o Provide the new user with his/her assigned user name and password

- You can also upload numerous users with the same user profile via a starter spreadsheet available at the top of the New User form (Import Multiple Users).

12. Which Profile should be assigned when adding a new user?

When adding a new user, the Program Administrator determines the user's access level (training, articles, etc.) to the site. You can select a default user profile or create customized profiles for your credit union and users' functional roles.

13. How do I upload credit union-specific materials and/or supporting training documentation into My Workplace?

Program Administrators can upload credit union-specific material to display to their employees under My Workplace. To add an event to the calendar or upload documents, such as your Employee Handbook:

- Control Panel> My Workplace

- Choose the item you wish to upload from the options provided.

- Follow the directions and click Submit.

14. How do I assign training to my users?

Training is automatically assigned to every user with a site profile of manager or above. The individual user can see his/her training assignment by signing on the Site and clicking the *Training* tab.

15. How do I access the training records of my users?

- Select Control Panel>Control Panel Options>Training>Reports

- To see an individual's detailed record, simply click on that person's name.

16. Can I change the training assignments and settings?

Yes, each Program Administrator can adjust the training assignments for his/her users. To do this:

- Select Control Panel;

- Click Training in the Control Panel Options; and

- Select Training Settings.

- If you do not wish to use a set of lessons or bulletins, simply uncheck them.

- To change the due date, select the desired length of time from the drop-down list.

- When the settings reflect your preferences, click Submit to register these choices.

17. How can I adjust training notices?

The Program Administrator can adjust the training assignments for users.

- Select Control Panel> Training>Adjust Training Notices

- Adjust by selecting Yes or No for each question.

- When the settings reflect your preferences, click Submit.

18. We are receiving notifications that training is due or past due. How can this be modified?

This can be modified by either adjusting training settings (adjust lesson module requirements and due dates) or by adjusting training notices (eliminate email notices).

Helpful Resources

19. How do I ask additional questions?

Click *Site Support* on the main menu bar of the site and submit your question. You will receive a reply promptly.

20. How can I measure usage at our credit union of the site, training, or Knowledge Vault resources?

As Program Administrator, you have the ability to monitor reports.

- Select Control Panel>Reports

- Choose the specific report feature from the usage reports displayed (site; training; or knowledge vault)

21. What resources are available and where can I find them?

- You have access to several resources that provide practical and actionable insights related to employment practices.

- Articles and news briefs on current workplace issues, legislation, and employment trends. Many include legal commentary, reader polls, and checklists with specific action steps. The Knowledge Vault provides easy access and topic-sorting capability by category topics. (Located on the home page, Today's Workplace, and within the Knowledge Vault)

- On-demand training, learning seminars, and best practice updates provide convenient and consistent modules and testing for your employees. Dynamic topics written by experienced litigators include: sexual harassment; discrimination; wrongful termination/retaliation; and ethical behavior. (Located within Training and the Knowledge Vault)

- Model policies, procedures, and forms geared to help you quickly implement organizational practices and employee guidelines on more than one hundred employment issues. These template documents are available as PDF documents for easy printing and as Word documents for credit union customization. In addition, several key policies are also available in Spanish. (Located within the Knowledge Vault)

- Model employee handbook with nine policy sections and sub-level policies are available as a template model to develop or enhance your credit union's employee handbook. More than 300 pages of documentation are available for your use. (Located within the Knowledge Vault)

- Built-in tracking, notifications, and reporting are available to assist the Program Administrator in tailoring training assignments, monitoring training progress, and tracking overall site use for your credit union. (Located within Control Panel)

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