











LOANLINER® Closed-End to Open-End Implementation Plan

Credit Union Name _____

Date Completed/Updated _____

 Find this material online in the LOANLINER Lending Resource Center

Key Implementation Tasks	Responsibility of:		Target Date	Completion Date	Status/Issues
	CMG Primary Contact	Credit Union Contact			
1. Learn about Open-End Lending					
a. Read <ul style="list-style-type: none"> • Quick Reference  • The ABC's of Open-End Lending  • Planning Guide for Consumer Lending  • FAQs  					
b. Attend a webinar <ul style="list-style-type: none"> • The Basics of Open End Lending 					www.cunamutual.com click on Resources, click on Lending Resources, click on View course descriptions.
2. Develop Your Lending Policy					
3. Select Your LOANLINER Option, and System					
a. Basic vs. Plus					
b. Simplified, Flexible or Packaged					
4. Select Your Lending Documents					
a. Use the LOANLINER Documents Guide 					
b. View sample documents 					
c. Call LOANLINER Compliance at 1-800-356-5012 for assistance.					
5. Determine Your Mix of Paper vs. Laser Documents					

a. See LOANLINER Paper or Laser Documents					www.cunamutual.com , click on Product, click on Operations Solutions, Click on LOANLINER Lending, scroll down and click on Laser vs. paper.
b. Check with your data processor for their timelines and mapping costs for both paper and laser documents.					
6. Place Your Document Order					
a. If laser, submit Licensing Agreement					
b. Submit Logo					
c. Submit Addendum to LOANLINER Compliance for review					
d. Notify your Data Processor					
e. If proof is required, review proof carefully and return					You order will be delayed until the proof is returned.
7. Develop Your Training Plan					
a. Have loan staff attend The Basics of Open-End Lending webinar					www.cunamutual.com click on Resources, click on Lending Resources, click on View course descriptions.
b. Read <ul style="list-style-type: none"> • Quick Reference  • The ABC's of Open-End Lending  • User Guides  • FAQs  					
c. Schedule document training <ul style="list-style-type: none"> • Webinar • In-house 					
8. Confirm data processor implementation dates					
9. Go live					
a. Call LOANLINER Compliance at 1-800-356-5012 for answers to your compliance questions					