



## Company Admin How-to Document

### Adding Members to an Unlimited/Unlimited+ Membership

**Purpose:** To add individuals already in the CUES system to a group membership. This process will trigger a welcome email from CUES to everyone added to the membership.

*\*This process is for CUES group membership company admins only.*

**Process:** This process is to be completed once an individual is added to the CUES system. To add someone to the system, please see the [CUES Member Help Center](#) guide 'Creating a New Account'.

1. Once you are logged in to [cues.org](#), you'll be in the myCUES Dashboard. From here, click 'Manage My Account'.

Hi, Laura.

Laura Gibbs  
Member Engagement Manager  
CUES Staff

Membership Level  
**Unlimited+**

Member ID  
1081755

Manage My Account >

2. Now, scroll down to the 'Manage Membership Access' section and click 'Add/Remove Membership Access'.

#### Manage Membership Access

*This section is for Company Administrators Only!*

In this section you may add, update, or remove staff from our database and grant them access to membership. The person must be added to the database before they can be granted access to membership. We recommend that admins review and update this information annually to ensure that only current employees and board members are receiving CUES access through your organization. This section is for company administrators only!

#### Company Profile Management

#### Add/Remove/Update Database

Check here to ensure that your staff/board contact is in the database. You must add them to the database before you grant them membership. You can also download your current roster of staff/board contacts in this section. This section does not grant or verify access to the membership.

#### Add/Remove Membership Access

Membership or magazine subscriptions for your staff and board. This option is only available to organizations with U or U+ memberships. You must enter the contact in the database before granting access. Only company administrators can use this function. Contact us at [cues@cues.org](mailto:cues@cues.org) for assistance.

- This page will list all current members included in your membership. To add someone who is not yet a member, click the plus sign (+) under 'Add/Remove'.  
\*This first section is for staff, if you need to add a board member scroll down to CU Board/Volunteer section and follow the same steps.

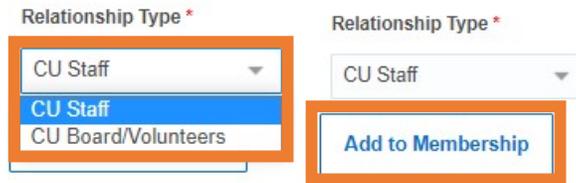
**Current Membership Relationships**

Membership : CUES Relationship : CU Staff		Included with Membership : Unlimited Maximum Slots Allowed : Unlimited	
Add/Remove	Member	Start Date	
+	- empty included slot -		
-	Alyssa Hulka	08/18/2021	
-	Art Chamberlain	10/22/2020	
Membership : CUES Relationship : CU Board/Volunteers		Included with Membership : Unlimited Maximum Slots Allowed : Unlimited	
Add/Remove	Member	Start Date	
+	- empty included slot -		
-	Cheshire Cat	06/30/2020	
-	Clarabelle Cow	06/30/2020	

- A new list will appear with everyone on file at CUES for your credit union. The last column, 'Already a Member?' will indicate who current members are. To add a new member, click the check box next to their Customer ID, you may select multiple at a time (please only do staff at one time, and board at another).

Selected	Customer ID	Name	City	State	Postal Code	Already Member?
<input type="checkbox"/>	1000159	Dawn Abely CUDE	Madison	CT	06443-3300	Yes
<input type="checkbox"/>	1091608	Temp Account	Madison	WI	53708-0167	Yes
<input type="checkbox"/>	1078471	Lynn Anderson	Madison	WI	53708-0167	Yes
<input checked="" type="checkbox"/>	1078493	Karen Bankston	Eugene	OR	97402-4031	No
<input type="checkbox"/>	1078553	Worker Bee	Madison	WI	53708-0167	Yes

- Once you have selected everyone to add to the membership, select the correct Relationship Type (CU Staff for staff members and CU Board/Volunteers for board members). Then, click Add to Membership.



Relationship Type \*

CU Staff

CU Staff

CU Board/Volunteers

Relationship Type \*

CU Staff

Add to Membership

PO Box 14167 Madison, WI 53708

Email: [cues@cues.org](mailto:cues@cues.org) | Phone: US: [608.271.2664](tel:608.271.2664) or [800.252.2664](tel:800.252.2664), opt. 2; Canada Tel: [604.347.7097](tel:604.347.7097)