

Amend a CUSO Record

Last Updated: 22-August-17

About Amending a CUSO Record

These steps apply to CUSOs that need to amend a record that has been certified and submitted or cancel an amendment started in error. CUSO administrators and contributors can update their registered CUSO's information at any time (excluding EIN and Registry Number).

Step 1: Navigate to CUSO List

To begin, log in to your CUSO account.

1. Open a Web browser and navigate to the [CUSO Registry](#).
2. Log in to your CUSO account.

3. From the CUSO List, select the CUSO you need to amend.

CUSO	Registry Number	City	State	Region	Status
CUSO Example	111-0000055	Stafford	VA	2	Registered

The CUSOs record will display on the next page.

Step 2: Amend CUSO

To initiate an amendment to your CUSO, locate the blue Amend button on your CUSO details page.

1. Click **Amend CUSO**.

2. Click on the tab for the section you need to amend



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Step 2: Amend CUSO (Cont.)

Note: If you navigate using the tabs on the left, you will see a message stating, "Are you sure you want to navigate away? Any unsaved changes will be lost. To save your changes, click Save Now located on the left side of the page, or Continue located at the bottom of the page.

Note: If you change your CUSO from non-Corporate to Corporate on the General Services page, you might see the Financial Audit Information tab appear, if it is not already on your page tree. Additionally, if you add services on the Services page that are high-risk and complex, you may see the Additional Service Information and Financial Audit Information tabs appear, if they are not already on the page tree. You will need to complete the information required on these pages to certify and submit your amendment.

Step 3: Certify and Submit

In order for your amendment to save and be reflected in your 2016 CUSO record, you must Certify and Submit your changes. Go to the Certify and Submit page. Check Yes next to "Yes, I certify that the information provided is current and accurate." A Certify and Submit button will appear. Click Certify and Submit to submit your Reaffirmation data.

After Certifying and Submitting the Amendment, you can save your submitted information in an Excel sheet for your records by clicking **Export 2016 Registration**. Make sure you keep an up-to-date and accurate record of your currently submitted CUSO information.

Step 4: Verify Amendment

To check your amendment information, open the excel sheet by clicking Export 2016 Registration. Verify the information rendered is the information you entered during the Amendment process. When the excel sheet opens, choose the section you would like to view from the Table of Contents.

Table Of Contents:

General Information
Services
Customers
Owners
Financial Information

You can also verify your Amendment by returning to your CUSO list. Click on the CUSO whose record you just Certified and Submitted. Click on the tab of the section you amended, and check that the information rendered is accurate.

CUSO Sample

Registry Number	Status	Year
111-0000036	Registered	2016



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Step 5: Cancel Amendment

Cancel Amendment allows the user to cancel an amendment started in error.

1. Select your CUSO from the CUSO List
2. Select the Cancel Amendment in upper right corner of the CUSO details page

CUSO Example 01

Registry Number	Certified By	Date Certified	Status	Year	
111-0000058	Ann Belair	01/27/2017	Registered (Reset to Credentialed)	2016	List of CUSOs Cancel Amendment Complete Amendment Download CUSO (Excel)

General Information Services Customers Owners Financial Audit Information Account Users

CUSO's Information

EIN 11-8281711

Type of Legal Organization

Does a corporate CU or a corporate CU's CUSO have an investment in your organization? No

Mailing Address 100 Duke St
Stafford, VA 22556

3. The Amendment Button will no longer appear which indicates the amendment is cancelled.

CUSO Example 01

Registry Number	Certified By	Date Certified	Status	Year	
111-0000058	Ann Belair	01/27/2017	Registered (Reset to Credentialed)	2016	List of CUSOs Amend CUSO Download CUSO (Excel)

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