

## Uploading Corporate CUSO Reports

Last Updated: 12-April-17

### About Uploading Corporate CUSO Reports

CUSO Administrators are required to reaffirm, and where applicable, update their registered CUSO's information on an annual basis. The yearly deadline to complete the reaffirmation process is March 31st. Much of your information is filled in from your previous registration, but Administrators should review and update information as needed.

### Step 1: Navigate to CUSO List

To begin, log in to your CUSO Admin account and locate the appropriate CUSO.

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

#### Do you have a user account?

Yes, I have a user account.

Great! Please login.

Username

Password

Remember Me

Login

[Forgot your username or password?](#)

3. From your CUSO list, select the desired CUSO.

CUSOs		Register New CUSO
Show	10 entries	Search:
CUSO	Registry Number	Status
		Latest Registration Year
		Task
Corporate CUSO	111-0000062	Registered 2016

### Step 2: Navigate to Corporate Reports

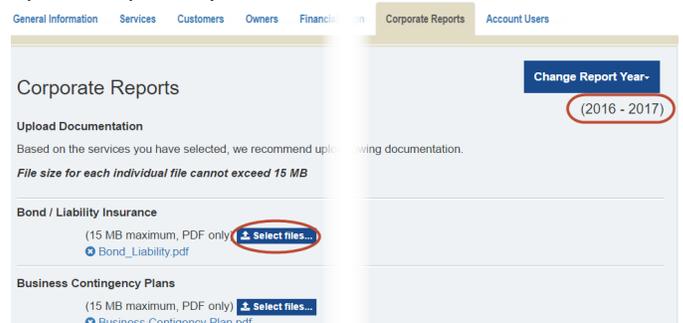
From the CUSO's details page, click the **Corporate Reports** tab.

**Note:** You may also click on the blue **Corporate Reports** button to navigate to the Corporate Reports tab.



### Step 3: Upload Current Year Corporate Reports

Your list of Corporate Reports will automatically default to the current registration year, indicated by the year shown under "Change Report Year." The reports listed are reports uploaded during registration or reaffirmation of the CUSO, or reports uploaded quarterly.



To upload a new annual or quarterly report:

1. Click "Select Files"
2. An Windows Explorer box opens. Navigate to where you saved the file on your local machine, select it, and then click **Open**.
3. The import process will begin, validating the file is 15 MB or less.
4. The file is uploaded, and a green "Upload Complete" message will appear.

**Note:** If your file exceeds 15 MB, a pop-up box will appear stating your file exceeds the size limit. You will not be able to upload this file.

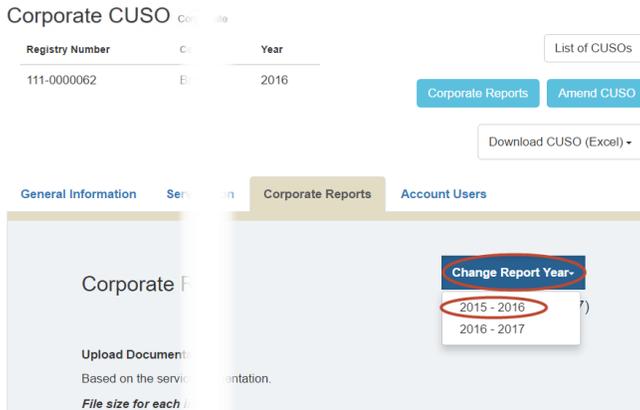


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### Step 4: Upload Past Year Corporate Reports

To upload CUSO Reports from a previous year the CUSO has completed registration or reaffirmation for, click on the Change Report Year button. A drop down will appear. Select the desired report year.



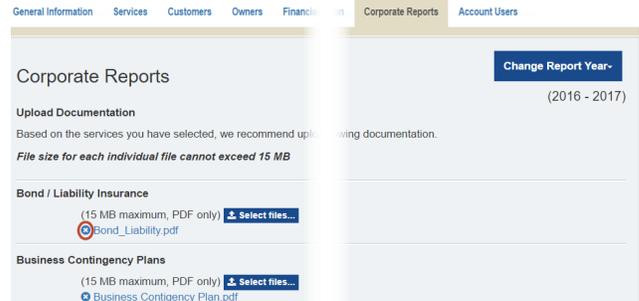
To upload a new annual or quarterly report:

1. Click "Select Files"
2. An Windows Explorer box opens. Navigate to where you saved the file on your local machine, select it, and then click **Open**.
3. The import process will begin, validating the file is 15 MB or less.
4. The file is uploaded, and a green "Upload Complete" message will appear.

**Note:** If your file exceeds 15 MB, a pop-up box will appear stating your file exceeds the size limit. You will not be able to upload this file.

### Step 5: Delete Uploaded CUSO Reports

If you would like to remove a CUSO Report you have uploaded, you may do so for the current registry year.



To remove a report:

1. Navigate to the file you wish to delete by scrolling through the Corporate Reports page.
2. Click the "x" next to the desired report.
3. A pop-up message appears, stating, "Are you sure you want to delete this file?" Click Ok.
4. The file is deleted from your Corporate Reports list.

If you would like to remove a CUSO Report you have uploaded for a **previous report year**, you will not be able to do so from the Corporate Reports page.

You must contact [cusoregistry@ncua.gov](mailto:cusoregistry@ncua.gov) and request to have the file removed. Once approved, the file will be removed from your record.

