

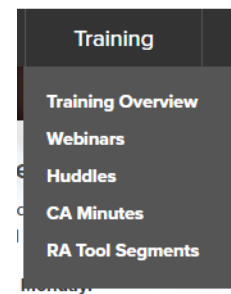
Training User Guide:

Compliance Alliance offers monthly online bank compliance training events. These trainings come in six types, Back2Basic Webinars, Board of Director Webinars, Training Webinars, Peer-to-Peer Huddles, C/A Minutes, and RA Tool Segments. All Webinars offered by Compliance Alliance are eligible for Continuing Education Credits. To view our upcoming Training events, please visit our Calendar in the “News & Events Tab”.

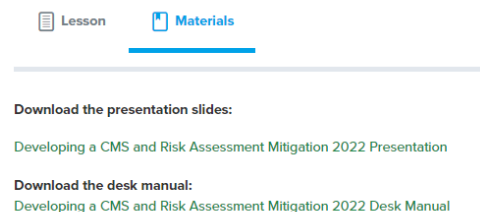
Compliance Alliance has recently updated our Webinar and Huddle pages to allow for tracking during the reviewing process and to automatically generate the certificate of completion for Webinars.

Please view the below steps for obtaining Certificates of Completion:

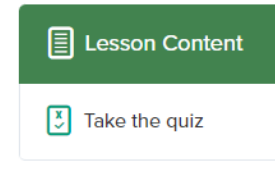
- i. Login to compliancealliance.com
- ii. Click on “Training” on the Menu Tab to open the dropdown menu. On the dropdown menu you will be able to see all our Training Courses:
 - Webinars
 - Huddles
 - CA Minutes
 - RA Tool Segments



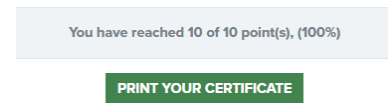
- iii. Webinars are divided into three sections: Back2Basics, Training Webinars, and Board of Directors.
 - Click on the webinar you would like to view. This will redirect the page.
 - Click on the “Materials” tab to download the Webinar Manual or PowerPoint.



- At the completion of the Webinar Video, scroll to the bottom of the page to access the Webinar Quiz. Please note, **upon completion of quiz, with a passing score 85% a certificate completion will automatically generate.**



- Click “Print Your Certificate” to download and save or Print the Certificate of Completion



iv. Huddles are grouped by the year the Huddle took place in

- Click on the Huddle you would like to view.
- You can download the Huddle Slides by clicking on the “Materials” Tab.
- At the completion of the Huddle Video, you can mark it complete by clicking “Mark Complete” at the bottom of the page.

October 2023 Compliance Huddle

IN PROGRESS

 Lesson

 Materials

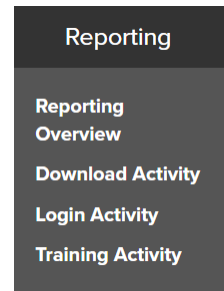
Materials: **October 2023 Compliance Huddle**

Administrator Tracking:

Bank Administrators can view the Training Activity of each user for their institution. Training Activity will inform the administrator of the digital content the Bank User(s) are in process of viewing, the status of the training video, and the last date the status was updated.

Please follow the below steps to pull reporting:

- i. Log in to compliancealliance.com
- ii. Click on “Reporting” on the Menu Tab. Bank Admins can also view Reporting by going to The Dashboard and at the bottom of the left column there is a section for reports.
- iii. Click on “Training Activity”
- iv. Here you can see a full list of activities for digital content on the site. You can see:
 - The User who is viewing the content
 - Title of the content
 - Status of the progression of the training
 - Last Update date. (Last date the user has access to the training and or content)



User	Title	Status	Last Update
Alycia Hinojos	November 2023 Compliance Huddle	In Progress	March 15, 2024 - 12:16 PM
Alycia Hinojos	Developing a CMS and Risk Assessment	Completed	March 15, 2024 - 12:15 PM

You can isolate the report by

- User
- Type
- Category
- Status

Training Activity for Bank of Compliance Alliance

User

All Users

Start Date

End Date

Type

All Types

Category

All Categories

Status

All Statuses

Generate Report

Reset Filter

If you need additional assistance troubleshooting a problem or have a question and or suggestion, please reach out to the Compliance Alliance support team by giving us a call 888-353-3933 or emailing us at admin@bankersalliance.org.