

April 16, 2022

Course Updates & Changes

The following document outlines:

- New courses released
- Regulation updates and affected courses
- Maintenance updates
- Retired courses

Please review and update your customized courseware, training programs, and LMS as applicable.

New Releases:

Remote Management OnDemand Webinar Series

Series description: The Remote Management OnDemand Webinar Series is a library of short, prerecorded courses for both remote employees and managers of remote employees. This training series is designed to promote best practices for working from home, such as proper time management for productivity as well as ways to overcome the challenges that can come with working from home including engaging remote teams, managing stress, and setting expectations.

Best Practices for Working from Home – 207301

Description: This course shares best practices for working from home including the importance of creating a separate workspace, expectations of self and others during work times and other times, and implementing routines to help you thrive.

Productivity While Working from Home – 207309

Description: This course explains how to be your most productive self and support your own results by prioritizing tasks. It also has a section on management and how to support your team's productivity by sharing best practices.

Time Management While Working from Home – 207312

Description: This course includes time management best practices for everyone and discusses how the illusion of time creates wasted time and diminished overall results. It also includes tips for ensuring managers share time management best practices with employees.

Managing Stress While Working from Home – 207313

Description: This course defines and identifies probable causes of stress and anxiety and gives strategies for coping with things outside of your control.

Building Resilience – 207315

Description: This course explains how to foster resilience in both yourself and your teams as well as giving strategies to avoid burnout. You will also learn how to identify and contextualize what team members need to thrive in challenging situations.

Setting Expectations and Giving Feedback – 207316

Description: This course discusses the five leadership pillars as well as when to manage, lead, coach, and mentor. It also explains how to delegate tasks and how to have impactful communications with ease.

Engaging Remote Teams – 207317

Description: This course discusses the similarities and differences of in-person and remote work environments, how to ensure your team is working and engaged, and best practices for defining good levels of engagement and results.

Directors Education Series

2204 – Managing the Risk of Court-Ordered Accounts – 209228

Description: The losses on court ordered accounts in this country are staggering. How much money does your institution have in court-ordered accounts? Have these accounts been set up correctly? Are your employees following the documents? Chances are your risk may be higher than you think.

E3 Courses

Commercial Compliance Overview - E3 – 210786

Description: This course provides an overview of the compliance issues affecting commercial lending. Some laws and regulations apply to all types of commercial loans, while other laws and regulations apply specifically to real estate-related commercial loans. These acts, guidelines, and laws are discussed in this course so that financial institution employees know what to be aware of and how to comply with specific regulations.

Active Shooter Response for Financial Institutions - E3 – 206954

Description: This course covers how to survive an active shooter attack using the run, hide, fight tactic. It delves into critical incident management and how an emergency action plan can use the unique characteristics of financial institutions as assets to increase survivability. Finally, it describes how to identify and prevent violent behavior in the workplace.

Regulation Updates:

The following courses have been updated:

Real Estate Settlement Procedures Act - Regulation X – 40019

Real Estate Settlement Procedures Act - Regulation X Refresher – 2746

Mortgage Servicing Compliance - Early Delinquent Borrowers – 162741

Mortgage Servicing Compliance - Loss Mitigation Procedures – 162744

CARES Act update – “COVID-19 Mortgage Relief” section added detailing information and solutions for exiting forbearance and repayment.

Maintenance Updates:

The following courses have been updated:

Federal Regulation of Real Estate Appraisals – 1899

CU - Federal Regulation of Real Estate Appraisals – 17186

DB - Federal Regulation of Real Estate Appraisals – 48190

HTML issue: *Implementing Regulations > Certified or Licensed? > Rules Governing Appraisals*

Clarification – Incorrectly formatted table has been fixed.

CU - Counterfeiting and Forgery – 17182

Question change: *What to Watch For > Counterfeit Currency > Knowledge Check 8*

Old version – Fill in the blank: “To the naked eye, _____ looks like a solid line and a magnifying glass is needed to see the detail. (Hint: Two words)”

New version – Multiple choice: “To the naked eye, it looks like a solid line and a magnifying glass is needed to see the detail.”

Safe Deposit Boxes – 128

Question change: *Pre- and Post-Test Question 24*

Old version – Correct answer: “The financial institution’s.”

New version – Correct answer: “The customer’s homeowner or renter policy.”

CU - Safe Deposit Boxes – 18755

Question change: *Pre- and Post-Test Question 24*

Old version – Correct answer: “The credit union’s.”

New version – Correct answer: “The member’s homeowner or renter policy.”

Fair Debt Collection Practices Act (FDCPA) - E3 – 179649

Question change: *Pre- and Post-Test Question 14*

Old version – Correct answer: “A home equity loan to cover home improvements.”

New version – Correct answers: “A home equity loan to cover home improvements” and “Obligations from consumer’s credit card.”

Ethics for Financial Institutions - E3 – 179649

Question change: *Pre- and Post-Test Question 12*

Old version – “A local businessman invites Sonia, his personal banker, to join his table at an annual dinner theater fundraiser for an after-school tutoring program. Sonia’s institution has sponsored tables at the same event in years past. Excited, Sonia accepts the invitation. *What, if anything, is ethically wrong with this scenario?*”

1. Sonia should have informed her institution of the invitation; there probably would not have been a problem
2. There is no ethical problem
3. Socializing outside of work with consumers is unethical no matter what
4. Sonia should have offered to sell tickets to the event at her office”

New version – “A local businessman invites Sonia, his personal banker, to join his table at an annual dinner theater fundraiser for an after-school tutoring program. Sonia’s institution has sponsored tables at the same event in years past. Excited, Sonia accepts the invitation. *What, if anything, should Sonia do?*”

1. Sonia should have informed her institution of the invitation; there probably would not have been a problem
2. *Sonia doesn’t need to do anything, she already accepted the invitation*
3. *Sonia should never socialize with customers outside of work, no matter what*
4. *Sonia should offer to sell tickets to the event at her office”*

Equal Credit Opportunity Act - Regulation B – 66737

CU - Equal Credit Opportunity Act - Regulation B – 67280

Question typo: *Pre- and Post-Test Question 16*

Old version – “You must notify the applicant within 60 days if an application is denied because of it is incomplete.”

New version – “You must notify the applicant within 60 days if an application is denied because it is incomplete.”

Bank Secrecy Act for Operations – 97

CU - Bank Secrecy Act for Operations – 14095

Removed old link: *Currency Transaction Reports > Filling Out a CTR Form > 2*

Old version – “Click here to see the [Getting Started with BSA E-Filing System.](#)”

New version – Link was deleted.

Mortgage Course Updates:

The following course(s) have been updated in the OCL Artisan environment:

Truth-in-Lending Act (TILA) – 12586

Typo: *The Truth-in-Lending Act > Advertising Requirements > 1 Trigger Terms*

Old version – “The terms of repayment over the full *tern* of the loan.”

New version – “The terms of repayment over the full *term* of the loan.”

Retired Courses:

There are no courses being retired this month.