

NATIONAL CREDIT UNION ADMINISTRATION
NCUA Form 5300 for Windows Credit Union Call Report
March 2009 Version 9.a Call Report Check List

<p>Computer Requirements</p>	<p>To run the 5300 Call Report program, your computer should have at least 32 MB RAM for Windows 2000, Windows Server 2003 or Windows XP with 2 MB hard drive space and Microsoft Internet Explorer 5.5 SP 2 or higher (7.0).</p> <p>As of July 2006 Microsoft discontinued support and security updates for Windows NT 4.0, Windows 98 and Windows ME. To address compliance issues and upgrade security NCUA was required to upgrade our Microsoft programming software. As a result of the programming software upgrade the 5300 Call Report program will no longer run on computers with Windows NT 4.0, Windows 98 and Windows ME operating systems. For additional information regarding Microsoft operating systems' security and support issues see http://www.microsoft.com/windows/support/endofsupport.mspx</p>
<p>Installing the 5300 Call Report Program</p>	<p>Do not install if the CD appears damaged. Please contact the NCUA Customer Service Center at 1-800-827-3255 or by email at ociocsdsk@ncua.gov for a replacement CD or to obtain software support. Additional information and the software installation file may be downloaded from www.ncua.gov/data/5300/5300.html.</p> <p>If your computer's operating system is Windows 2000, Windows XP or Vista, you may need administrator privileges to install the 5300 Call Report Program. If you do not have administrator rights, please have your credit union's computer specialist/IT professional install the program for you. To install the program, insert the 5300 Call Report CD into the CD drive. After a few seconds the National Credit Union Administration Main Menu will appear. Click on the Install Call Report option and follow the prompts until the installation is complete. There are five additional menu option buttons: Call Report Files, Install Report of Officials, Report of Officials Files, Open Support Folder, and Contact Us. The Call Report Files option is a folder that contains: the 5300 Call Report Help/Instructions file, the Call Report form (PDF format), and this Checklist (PDF and Word format). <u>On the Install Report of Officials option, please note that no changes were made to the Report of Officials program for the 2009 reporting period.</u> If the 2005 version is already installed on your computer you do not need to reinstall it. To check if you have the correct version, upon starting the Report of Officials program the opening splash screen will display "NCUA Report of Officials, Version 3.2, and January 2005". The Report of Officials Files option is a folder that contains a copy of the Report of Officials Help/Instructions file, and the Report of Officials form (PDF format). The Open Support Folder contains miscellaneous support files your computer may need to run the 5300 Call Report program including Internet Explorer 6 SP 1. Please contact the NCUA Customer Service Center for assistance. Contact Us has two options, a link to the NCUA Website and the NCUA Customer Service Center's email address.</p> <p>At a minimum, you must have Internet Explorer (IE) version 5.5 SP 2 or higher (e.g. IE 6 SP 1 or IE 7.0) on your computer to run the 5300 Call Report software. If IE 5.5 SP 2 or higher is not installed on your computer, we have included Microsoft IE version 6 SP 1 on the Call Report CD. You do not need to install IE 6 SP 1 from the CD or download IE 7.0 from Microsoft if it is already installed on your computer.</p>
<p>Getting Started</p>	<p>The installation process will create an icon labeled Call Report on the Windows desktop screen. Double click on the icon to start the program. The program opens to the NCUA Form 5300 Home Page. To begin data input, click on the word "<u>here</u>" in the line which reads: To start a new report, click <u>here</u>. The Start a Call Report window will appear. In the Form drop down option box, select the March 2009 5300 option. See the cover letter included in the 5300 Call Report package for additional information on completing the 3/31/2009 5300. The Check Digit and Region information are also located in the cover letter.</p>
<p>Program Help</p>	<p>The User's Guide instructions are available within the 5300 Call Report Program Help section and on the NCUA Website at www.ncua.gov/data/5300/5300.html. To access the Help section while in the 5300 Call Report Program, click Help on the menu bar and select the Contents option.</p>