



Writing Team: Tricks of the Trade

October Top Picks: 14.2 Release Documentation

Issue 35

Be sure to attend the upcoming Tricks of the Trade webinar on October 16 from 3:30-4:00 PM ET. Watch for an invitation via email. Interested in learning about documentation on the changes with the 14.2 release, including the new “required usernames” feature? Don’t miss the webinar!

Pick #1: [Where can I learn more about the new \(and optional\) “required usernames” feature for “It’s Me 247”?](#)

Your credit union can choose to activate “required usernames” as an added security measure in online banking. Once you activate this feature, all members will be required to set up a username and use it in place of the account number when logging into online banking and mobile web banking. Additional new enhancements related to usernames include rules for new usernames and the ability for members to change their username in mobile web banking in addition to standard online banking.

Learn more in the [“Strategies for Securing and Controlling Member Access”](#) booklet available under “I” and “S” on the [It’s Me 247](#) Reference page. View how members can change their usernames in mobile web banking in the [“Mobile Web Banking”](#) booklet, available under “M.”

Pick #2: [There were several changes to delinquent notices with 14.2. What booklets should I look at to learn more?](#)

New with 14.2 are notice groups that categorize your delinquent-notice configurations. In addition to the default “General” notice group, there are “Credit Card,” “Mortgage,” and “Other” delinquency notices. Additionally, Automated Non-Return (ANR) notices can now be sent to joint owners.

Learn more in the [“Configuring Tools for Collections”](#) booklet, available under “C” and the [“Automated Non>Returns”](#) booklet, available under “A” on the CU*BASE Reference page.

Pick #3: [What will I see if I have edits to make on my next 5300 Call Report?](#)

When you upload your 5300 Call Reports to the NCUA from CU*BASE, a pop-up window will now list the more critical errors that need to be corrected prior to completing the upload.

Learn more in the [“5300 Call Report and CU*BASE Tools”](#) booklet, available under “C” on the CU*BASE Reference page.

Pick #4: [Where can I find the major changes implemented with the release?](#)

Look no further than the [14.2 release summary!](#) Find this on the [Release Summaries page](#).

Pick #5 (Client Choice): [How do you create a mailing list of escheat members?](#)

Beginning with this issue of the *Tricks of the Trade* newsletter, we are listing a client-requested documentation change as Pick #5. This will detail a change that was made to documentation as the result of a client request or comment.

With this issue, we’d like to highlight the [“Dormancy and Escheat Monitoring”](#) booklet, to which we added directions for creating a mailing list of escheat members. Check out the new directions in the [“Dormancy and Escheat Monitoring”](#) booklet, available under “D” on the CU*BASE Reference page.

Refer to the Tricks of the Trade Newsletter Series page for all issues: http://www.cuanswers.com/tricks_of_trade.php

