Writing Team: Tricks of the Trade
January Top Picks: Year-End and Monthly Activities
Issue 38

Be sure to attend the upcoming Tricks of the Trade webinar on January 13 from 3:30-4:00 PM ET. Watch for an invitation via email. Learn about documentation on year-end processing and monthly tasks.

Pick #1: Where can I find documentation outlining the year-end tasks I need to complete after December?

Even though December is past, there are still things that need to be done to close out 2014 (and to prepare for 2015). Check out the timeline at the beginning of the 2014 Year-End Processing Guide for more information. Each task is assigned a deadline and a page later in the document where you can learn more.

Find the 2014 Year-End Processing Guide for Online Credit Unions and the 2014 Year-End Processing Guide for Self-Processing Credit Unions under "Y" on the CU*BASE Reference page.

Pick #2: Where can I find a booklet outlining month-end tasks?

While you are thinking about year end, why not also review our helpful documentation on month-end tasks? Use the Table of Contents as a checklist of each item. Then refer to the corresponding page for more information.

Find the Month-End Processing Verifications: Due Diligence Verifications to be Run Every Month End booklet under "M" on the CU*BASE Reference page. This is prepared for both online and self-processing credit unions.

Pick #3: Where can I find the software enhancements implemented each month?

Each month we email you a link to that month's Monthly Monitor Recap. It covers every project implemented in the previous month. It is always a long list! By reviewing all of the Monthly Monitor Recap newsletters, you can also see all projects implemented since June of 2013 when we began publishing the Monthly Monitor Recap.

Find the Monthly Monitor Recap newsletters on the Release Summaries Page.

Pick #4: Where can I find the top ten AnswerBook items for the month?

The "Top Ten AnswerBook Items" email is sent at the beginning of each month from our Client News mailbox. It highlights the most-viewed AnswerBook items for the previous month. The last email highlighted the most popular items for the 2014 calendar year.

Watch for the next "Top Ten AnswerBook Items" email in early February.

Pick #5 Where can I find what was implemented with the year-end release? What about for the year?

For information on the new enhancements with the December release, be sure to check out the 14.4 Release Summary on the Release Summaries page. You can also review all enhancements implemented in 2014 by reviewing all of the release summaries posted in this location.

Find the 14.4 Release Summary on the Release Summaries Page.

Refer to the Tricks of the Trade Newsletter Series page to review previous Tricks of the Trade newsletters!