

CU*BASE[®] Software Enhancement Summary 2009

*This is a summary of major enhancements to the CU*BASE software that were released during 2009.*

- Contingent Liability Enhancements
 - Negative Balance accounts show on Contingent Liability Report
 - New Contingent Liability Online Analysis
- Multi-Corp Consolidated Financial Reports
- **It's Me 247** Enhancements
 - Members Can See Pending ACH Transactions
 - Members Can Enter Secondary Transfer Description
 - More Renewal Options for Certificates Offered
 - View Dividend Details for Closed Accounts
- Experian Authentication Services – Level 1 (AS1)
- Reg. D Report Enhancements for completion of the FR2900/2910 Reports
- ALM Enhancements
 - Additional fields in the ALM File
 - New Re-pricing informational fields on variable rate loan codes
- Escrow Enhancements
 - Flexible Escrow Payments for 365-Day Interest Calc Types
 - Ability to Suspend Specific Loans from Escrow Analysis
- Fee/Fee Waiver Enhancements
 - Standardizing the Fee Hierarchy
 - Fee Income and Waiver Analysis Online Inquiry
- Qualified Dividends (CU*BASE Answer to “Reward” or “High Interest” Checking)
- Dividend Donations: A New Savings Tool
- Work Collections Screen Enhancements
- Collections Tool to Charge-off Savings/Checking Accounts
- More eDOC Integration – Generic Loan Forms
- Skip-a-Pay for Online Credit Cards
- Convenience Checks Third Party File
- 360 Mortgage Enhancements
 - More Control over and Ease of Member Payments on 360 Interest Type Mortgages
 - Members Pay 360 Mortgages Online in **It's Me 247**
 - Teller Messaging
 - **It's Me 247** Messaging Assists Members
- Teller Enhancements: Balance Forward to the Same Member
- Branch Addresses Recorded on Account Maintenance Screen
- Shared Branching Transactions included in BSA Monitoring Reports
- Due Diligence Monitoring
 - New Flag on Membership Information Screen
 - Updated report for easy reporting
- Authorized Address Change Required on Loan Coupon
- Audit Tracker Record for Wrong Email Flag Change
- NCUA Share Report for Confirmation of Share Insurance Calculations
- Print Envelopes Directly from Inquiry/Phone or Vendor Screens
- Self Processors: Tools for Setting Up a Training Library
- New Collateral Screen for HDMA Reporting
- Application Comments Added to Loan Officer Worksheet
- Stop Pay Enhancements
- More GOLD Graphs and Exports
- 5300 Reporting Now Available through CU*BASE
- Funds Forward Feature to Miscellaneous Advance Screen
- Print Output for 5300 Call Report
- Privacy 2010
 - Part 1: “Cleansing of Screens and New Configurable Privacy Controls
 - Part 2: Security Audit for Shared Branch Activity
 - Part 3: Block Search Capabilities for Shared Branch Tellers
- 360 Mortgages Enhancement: Collecting Delinquent Fines
- Expanded Product Codes for Tiered Services Points Config
- Mail Codes are Now Improved “User-Defined” Codes
- Marketing “Opt-Out” Flags and Preferred Contact Method
 - Flagging Members Who Want to Opt Out
 - Honoring Opt Out Flags in Marketing Efforts
- Business Days Configuration / Changes in Uncollected Funds
- Handling Death Benefits Paid to Beneficiaries (Part 2)
- Cross Sales and Tracker Improvements
 - Work Cross Sales from Tracker Review
 - Clean Up Your Member Tracker Records
 - New Configuration Options for Trackers
- DBA Name Labeling and Printing Enhancements (including Membership Designation Configuration Changes)
- The Return of CU*BASE GOLD Favorites
- Various Report Enhancements

- Employee Security Enhancement
- Employee Security Audit Reports
- Effective Dating Option for Allowed Account Types
- New Adjustment Menu (MNADJ)
- Learn From a Peer – Tiered Services
- Red Flag Warning Message
- 5300 Call Report Configuration Report
- Online Ballots
- Teller Hold Processing Enhancements
- Escrow Enhancement for Payee Options
- Written-Off Loan Enhancements
 - Account Numbers Appear in Written-Off Loan G/L Transaction Description
 - Track Written-Off Loans with Multiple G/Ls
- New .NET Graphs
- G/L History Inquiry Enhancements
- Members Can See Principal and Interest Breakdown in “It’s Me 247”
- Report Enhancements
 - Enhancements to Member Trial Balance
 - Updates to Two Lending Reports
- Upcoming 5300 Call Report Tools
 - Update Data to the NCUA Website Directly from CU*BASE
 - Auto Pop Routine by Dividend Application
- OFAC Scans on Manual IAT Returns
- Mortgage Forms Enhancements