



CU*BASE

13.5

CU*BASE® Software Upgrade

Online CUs	Site 4	Self Processing CUs
March 9, 2014	March 9, 2014	March 10-11, 2014

Updated booklets  mentioned in this summary will be available on our website no later than **March 7, 2014**. Access the CU*BASE Reference page by selecting "I am a Client" from <http://www.cuanswers.com>, Docs & Information, then CU*BASE Reference. Access the **It's Me 247** Reference page by selecting "I am a Client" from <http://www.cuanswers.com>, Docs & Information, then It's Me 247 Reference. Documentation will also be available through the "What's New" topic in Online Help when you get the release. Updated Online Help , including the "What's New" summary list of all changes, will be included when you receive the release.

- Important: If you are using the Automated Reports & Queries feature to automate Queries each month, you'll need to keep a close eye on file changes each time there's a release and update any files used in your automated Queries so they run properly. Refer to the File Changes document attached to the announcement for this release for details.



Immediate Effect

Changes automatically take place on the day the release is implemented; no additional configuration is required.



Must be Activated

Your credit union must make a decision either to activate it or modify configuration parameters. This sometimes requires contacting a Client Service Representative.



Team Implementation

Work with a Client Service Representative before implementation.





May Incur a Fee


There may be a fee involved to implement this feature for your credit union, such as a one-time setup and/or a monthly maintenance fee, or related charges from a third-party vendor.

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Auditing



\$ Automated Upload of CTRs (Currency Transaction Reports) to the Financial Crimes Enforcement Network (FinCEN)

Now, credit unions can select to have their completed CTR forms sent directly from CU*BASE to FinCEN. This removes the time consuming step of re-entering the information into the FinCEN website.

This feature requires activation and a nominal monthly fee will be charged. Check out the [Automated Filing of CRTs to FinCEN brochure](#) for pricing and a sign up form. CU*Answers needs an authorized signature for activation. Fax the form on Page 2 to the Client Services department. (The fax number will be on the form.)

Once the feature is activated, preparation of the CTR will remain unchanged. To transmit your records, your employee completes the CTR for transmission and locks it as usual. Once the CTR is locked, the record on the “Work with Currency Transaction Reports (CTR)” will read “Locked/Transmit.” (This screen is accessed via *Work All CTRs* (F15) on the BSA Inquiry screen and via **Work with CTR Forms** on the Member Service (MNSERV) menu). This description is not new, but now only will be used with credit unions that activate the upload process. (See the yellow box below for more information.)

During end of day processing, the CTRs that are prepared in this manner will be transmitted FinCEN. The descriptions for these CTRs will change to read “Transmitted.”

Important Note: Once the feature is activated, it will only affect CTRs going forward. CTRs locked prior to activation will not be sent to FinCEN, but will instead need to be manually entered in the FinCEN website. So to make it easier to keep track of what you’ve sent and not sent, you might want to make sure you are all caught up on outstanding reports before asking us to activate the feature for you.



We will send the forms to FinCEN and they will process them. If they have any problems with a form, they will return the form to us and you will see this item on the list marked as (with a description of) “Error.” To prepare the CTR for resubmission, simply select the CTR and *Edit*. The first screen of the CTR will have a new “View Errors” button (F22) to access a screen containing information on what needs to be corrected.

If your credit union chooses not to activate this upload feature, a locked CTR at your credit union will now have a description of “Locked Only” for better clarity. Your procedures for handling CTRs with errors will not change. (Since you are not uploading a file to FinCEN, FinCEN will not return an error file.)

	Refer to the “Bank Secrecy Act Monitoring Tools” brochure available on the CU*BASE Reference page for details after the release. To sign up for the feature, check, check out the Automated Filing of CTRs to FinCEN brochure .
	Details for all related screens will be available via CU*BASE GOLD Online Help with the release.

Auto-Fill of Contact Information in all New CTRs

Another time-saving feature for everyone! With this release, you can now auto-fill the contact information (contact office, phone number, and extension) into each new CTR. Use the new “Contact Information” button (F9) on the Bank Secrecy Monitoring screen to access the screen where you fill in this information. Then going forward, this information will be pre-filled into each CTR form. (If you change this information on a single CTR, the different contact information will be saved with that CTR only.)

	Refer to the “Bank Secrecy Act Monitoring Tools” brochure available on the CU*BASE Reference page for details.
	Details for all related screens will be available via CU*BASE GOLD Online Help with the release.

Management

Learn from a Peer – Credit Unions Can View Credit Unions Across the Network

The Learn from a Peer features, located on the “Learn from a Peer” Analysis Tools (MNMGMB) menu), allow you to compare your fees, products and services against those of other credit unions. Until this release, you have been limited to comparisons with other CU*Answers credit unions.

With this release the feature, you can now collaborate across the network with the addition of CU*NorthWest and CU*South credit unions. (Self processors don’t worry! We’re still thinking about ways we can include your data in these tools as well. Contact us if you are interesting in helping us pursue this idea further – we could use a good beta site!)

Member Facing

Self Service Channel Custom Branding Options for “It’s Me 247” and Mobile Web Banking

For years, members who use the **It’s Me 247** online banking channel have enjoyed features that allowed them to personalize the site to their preferences. The very name, **It’s Me 247**, was targeted at making every individual member feel like they were the central focus. But options for customizing the online channel were relatively limited when it came to identifying the credit union.

With the look-and-feel upgrades to **It’s Me 247** in January of 2013, we launched a new platform to improve navigation and also allow for credit union-level customization.

Now you have many options to express your brand in **It’s Me 247** online banking and Mobile Web Banking. From making your logo the marquee on every page, to creating a unique color scheme and uploading custom photo albums, your credit union can now take advantage of the next evolution for our self-service channel solutions

Refer to the Self Service Channel Custom Branding website for more details
<http://ws.cuanswers.com/development/self-service-branding/>

This was implemented on February 19th, 2014.