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CU*BASE® Monthly Monitor Recap

September 2014

Your credit union is part of the CU*Answers collaborative network, your network. Even during the File Expansion Project (FEP), we remain responsive to your needs and continue to implement a significant amount of programming each month. The CU*BASE Monthly Monitor Recap is designed to keep you informed in an ongoing basis of feature improvements, vendor enhancements, and other miscellaneous changes to CU*BASE and our other core software products.



Some projects in this document were only released to clients on the File Expansion Project (FEP)

This specific Monthly Monitor Recap covers programming changes implemented during the month of August.

To learn more about all projects in the pipeline, refer to the Monitor website at <http://monitor.cuanswers.com/>

Enhancements

- Added the ability to view non-members, co-signers, co-applicants, and guarantors in the Loan Concentration Risk by Member Analysis screen.
- Improvements to show all codes window in the lending queue
- Enhanced the credit card loan creation process when linking plastic without a card order
- Collection Notice expansion (for mortgages, credit cards)
- Added an option to generate a notice for joint owners in MNCNFA, #12
- Enhancements to the escrow analysis prompt options to decrease necessity for repetitious runs
- Updated the GL Trial Balance by date to be run by day rather than just by month
- Added CUFMNT records for OTB maintenance
- Added NCUA edits to the call report software
- Added edits on all processes where operators can modify the date fields
- Created additional direct login widgets for CUs websites
- Created a statement reconciliation dashboard using data gathered in the STMRECON file
- Updates to the re-price medallion collateral
- Collateral Record Updated
- Enhancements to package loans to be sold
- Enhancements to package loans to be sold report
- Added a new maintenance record for the CU risk level
- Updated the report/dashboard LTV calculations to check loan category configuration
- Updated the interactive OFAC scan to recognize the new FSE list.
- Added qualified dividends on the Its Me 247 online banking rate board
- Added a require username flag in ItsMe247
- Added PDF and Excel dashboards to the MNMGMB menu

- Instant card issue for Vantiv credit cards
- Added the dividend payment method and early redemption penalty on misc forms
- Added blocked person warning to loan app process and added OFAC scan for co-applicant
- Added a report to track users when they sign on by creating a security audit record each time an employee successfully logs on

Internal Enhancements

- Added a Y/N option that will initialize, dupe, and display the tape during back up
- ItsMe247 Backend Update for bill pay

Miscellaneous

- Corrected the ghosting of Next Suggested Product when working in Xtend shared branching
- Updated the CD TIS to no longer occasionally printing UNKNOWN for the payment frequency, instead printing the correct payment frequency from the CD configuration
- Updated format and corrected data on the 247 Lender Performance report
- Allowed addition of credit report BIN in a multi-corp environment
- Updated PCKACT to capture error when NSF fees for a single member in a single month exceed \$9999.99
- Added Mortgage statement totals in statement recon file
- Changed the left arrow/backup button to send an FM to the host instead of F7 on the loan product configuration panel
- Updated configuration in MNCNFB, #17 to the correct numbering sequence Removed error in LMBRTX when trying to convert LNTYPE from decimal to character
- Changed the tax report for 1099A, C, and M to better reflect what is reported to the IRS for non-members and closed members
- The JL/JD monthly payment is no longer defaulting to the JL/SD amount in the loan quarter
- Updated labeling of the “delete” screen on the ACH distribution maintenance screen to match the function key labeling of “delete company”
- Update the “Own Type” field within inquiry to populate with the type of ownership relationship the individual has with the account
- Eliminated multiple user error in the Member Mail/Direct post to allow for more than one user to access the menu at a time
- Added statement style counts for credit cards in statement recon file
- Updated the debts portion of the loan analysis screen to no longer simultaneously check or uncheck two lines when checking the “sec” box
- Updated the cross sales tasks screen to display the spy glass next to “Filter by Task”
- Updated generic denial notice to now default the credit bureau information onto the screen if not found correctly by number
- Updated the open/maintain membership/accts screen to allow for change of application date
- The calendar next to the file verification date is now popping up correctly to allow selection of a date
- Eliminated security code error in phone operator when attempting to access accounts
- Updated the work/view application status screen to allow addition of a co application on a loan application
- Updated the CTR file to store the cross reference field and write it out on the daily report
- Eliminated system error in the job log for the JHA (PEMCO) Partial Authorization indicator when not all the bits are sent.
- Update to Online to RECON matching situation where a reversal message without a matching original message will now display.
- Updated FIS Certegy Vendor Recon to correctly display the merchant name for credit and transfers.