

The CU*BASE Monthly Monitor Recap is designed to keep you informed on an ongoing basis of feature improvements, vendor enhancements, and other miscellaneous changes to CU*BASE and our other core software products. This specific Monthly Monitor Recap covers programming changes implemented during the month of October.

Enhancement

- 42137 Added check detail to the Payveris transaction history file and added a purge program
- 42138 Added the receive and retention of Payveris subscriber data.
- 31249 Recurring A2AFT and OTB transfers
- 31997 Added filters for 247 Lender
- 32597 Added notice event for safe deposit box renewals
- 37143 Enhancements to ATM, Debit and Credit card ordering regarding emboss names
- 37216 Added a dashboard to the List Generator function
- 37525 Enhancements to the Fee Waiver and Fee Refund dashboards
- 37681 Created a new OTB transaction file for OTB loans and added ability to display from inquiry/phone
- 37811 Added new process to allow loan category changes on credit cards
- 37867 Added a display message in online banking to display when Money Desktop is down
- 37938 New Learn from Peer Net Relationship dashboard
- 37953 New Look to Book dashboard for Loan applications
- 38480 New Automated Collateral valuation from NADA
- 40003 New Cross reference table to assign a primary company ID for SSA ACH deposits
- 40030 Added new tracker types to indicate notices that were not sent due to write-offs and ANR flag
- 40432 Added ability to set daily limits for national shared branch transactions
- 40671 Added new PMI escrow format type for Private mortgage insurance
- 40783 Enhancement to tiered services for credit scores, and ATM/debit and credit transactions
- 40941 Added a new negative balance teller override to allow posting to negative from teller
- 41295 New Alternate address function for EFT maintenance
- 41572 Added multi-selection of branches on the filters for All Accounts/All Memberships Analysis dashboard

- 41708 Enhancement to Phone Op wrap-up codes to automate trackers notes and follow-ups
- 41747 Added the Contingent Liability report to the Automated Report scheduler
- 41959 Enhancement to the investment maturity report to allow multiple selection of type and FASB codes
- 41964 Added last 10 account feature to various member service functions
- 42031 Added Dividend and Interest details to It's Me 247 Mobile Web
- 42032 Added the stop payment feature to Mobile Web
- 42055 Updated EFT Dashboard and Credit Card Dashboard to accommodate multiple loan category changes
- 42367 Added the ability to unlock the next card number for BIN in card configuration to allow maintenance when needed.
- 42430 Added the OFAC scan when redeeming a CD via check
- 42747 Adjusted the loan app to handle when CU has a logout configured for the loan app
- 43166 Increased ability to receive up to 10 ACH files from Fedline at once
- 43191 Modified the Where Members Branch screen to display the appropriate branch name

Imaging Enhancements

- 41352 Add new TIFF format variations to Document server for third party scanned documents
- 41397 Created Job Manager Service to execute data integrity service scans and reports on Imaging Solutions systems.
- 41396 Added "Analyze" report to Vault manager reports
- 41398-41399 Created a Data integrity service to identify orphaned records and reports
- 41400 Enhanced the event log details for Vault Manager
- 41402 Added Vault Manager reporting to additional services and applications
- 43285 Added "Reports" interface to Vault Manager

Internal Enhancements

- 37730 Added online banking platform settings API Nuget package
- 37802 Added mater maintenance programs for A2A reason codes
- 37847 New custom branding database and maintenance programs
- 38777 Modified GoAnywhere project to pass parameters to determine which files to send
- 40856 Modified tax reporting programs to use centralized table for combined state filing

- 42919 Modified the service charge programs to use a more efficient fee waiver process

Imaging Modifications

- 42142 Eliminated date encode error in Intellisweep
- 42299 Added ability for ISweep to run with domain that is a member of the local administrators group
- 42772 Upgraded PHP to latest supported
- 42773 Upgraded MySQL to latest supported
- 42791 Allow for specific characters in account names in member statements displayed in Member Portal
- 42870 – 42878 Upgrade multiple imaging applications to eDoc 8/16 release version
- 41403 Moved Vault Manager to different API
- 42497 Corrected failed file updates in specific conditions
- 42647 Deploy PI restart service to automatically restart API services during idle time to prevent outages
- 41401 Improved Vault Manager event handling

Internal Modifications

- 43283 Updated Sageworks and Go Anywhere to alleviate hard halt when sending file
- 43299 Eliminated record locks during the delete of stand-in files
- 42984 Modified support menu save library command to allow for faster file transfers
- 43076 Changed subsystem dashboard to remove robot libraries before restarting
- 43314 Modification to always pull default number of copies from the proper location when processing ACH returns
- 42089 Obsolete file LNPAY which is no longer used
- 42919 Changed a gold screen to translate a button to the correct selection when resending to CU*Spy
- 43030 Adjusted FISERV SSO handoff to exclude server URL from parameter
- 43066 Changed vendor notice process to handle 4 digit CUID
- 43447 Adjustment to Payveris posting program to move from beta to production environment

EFT Modifications

- 43448 Update to FIS batch credit card maintenance to look at appropriate file
- 43456 Update to ICI emboss program to handle the special characters in the file
- 43458 Update to the header file for Vantiv Batch maintenance

Modifications Due to a Third-Party Vendor

- 42292 Field changes for CUNA loan participation tracking file

Modifications

- 42761 Changed the tax programs for 1099INT, 1099MISC and 1099R to include the state Tax ID# in the file for combined state filing.
- 40647 Modification to denial notice to pull indexes for Prodoc
- 42219 Update to standard application so that leading zeroes in SSN will now display
- 43083 Corrected the printing of outstanding principal loan limit on the generic mortgage form
- 43271 Modification to eliminate errors when coming out of stand-in
- Populate employee ID in ODT and SDNRF fee records when posting ACH through robot
- Modify write off/charge off dashboard to eliminate error when finding invalid birthdates
- 43269 Eliminated possibility of displaying balance of account transferred to in It's Me 247 when primary member is not on account
- 38209 Modified credit card statement creation to assure that the alternate payment savings total does not calculate as a negative number
- 43072 Modified the 3 year GL account balance comparison to assure that GLs with no recent activity compute correctly
- 40573 Adjustment to assure that CPI expiration will result in an appropriate payment change
- 41955 Added additional edit checking for special characters in file naming for prompt screen of Ballot Results Report
- 43009 Changed membership online applications to default to MI membership designation
- 43280 Added abbreviated state ID for the IRS formatted file for 1099 INT, 1099MISC and 1099R forms
- 43297 Modify rate board analysis dashboard to increase loan and CD types
- 42281 Modified the export of the delinquency analysis report to show the purpose code field in the file
- 43351 Added edit to not allow OUTQ printer assignment for P1 or PRT01
- 34194 Modified AFT so that remaining transfers updates appropriately when an AFT transfer occurs.
- 37173 Modified the skip payment feature in online banking to NOT require an account number
- 38428 Modified loan application to display roll over date of year 2045 correctly
- 38775 Modified Tax order form to provide additional edits and add new fields
- 40372 Modification to the ARM notice
- 40408 Added edits to account and membership maintenance to assure that open dates sync between membership and accounts
- 40972 Added a subtotal to the It's Me 247 Account summary page (PFM project)
- 40984 Modified the dealer number populating from external loan applications
- 41437 Expanded the 'min amount to earn dividend' field in the DIVAPL configuration
- 41464 Modified Common bonds to allow use of files when additional fields follow the account base

- 41492 Updated statements so that CU message will not print on statements for deceased members
- 41783 National shared branching mandate change to make minor adjustments to the account number format
- 41949 Modification to CU*TALK to obey the controls for allowing deposits to specific DIVAPLs
- 42433 Change the label to indicate “Held Funds” in It’s Me 247 Mobile when appropriate
- 42171 Unbranded bill pay products by removing “EasyPay” verbiage in a few locations
- 42176 Modified logic to determine when the “My Check Image” button should be presented in the timeout window
- 42235 Eliminated an error in Payveris bill pay when adding a payee and not selecting the identical payee from the auto-generated list
- 42288 Added branch name in National Shared branch inquiry when presented
- 42444 Changed the account creation process through online banking to populate the last accrual date in the same manner as CU*BASE
- 42457 Modified OTB loan product maintenance screen to properly display the balance if negative
- 42465 Modified Suspicious activity screen to warn of transactions only when appropriate
- 42510 Corrected a decimal placement issue on the Net Relationship dashboard when selecting filters for Member balance detail
- 42525 When loan category is maintained in member maintenance, also added the modification to any contract variable rate records
- 42530 Modified the national shared branching program to record cashed check transactions in a manner that they will appear on the reconciliation portion of the member’s statement
- 42579 Added edits to the member application process to verify reasonable employment start and end dates
- 42628 Modified CFT records from HSA’s to properly handle HSA fee transactions
- 42635 Changed the field used to bring in loan officer ID on the credit card dashboard to use approving loan officer instead of loan processor field
- 42654 Corrected the budget screen to properly display the last record in the subfile
- 42696 Removed the ‘CU*BASE Features’ used button from the customer master maintenance/inquiry screen
- 42702 Re-activated the ability to ‘click’ the Next Suggested product
- 42713 Removed an error when multiple tellers were using ‘verify activity’ in teller processing
- 42745 screen modification to display all date in the time frame selected in the interest accrual calculator
- 42750 Adjusted the language in the tip screen for the loan classification update
- 42789 Corrected the CU*BASE logo on the ATM maintenance screen
- 42807 Adjusted member update screen to allow access to online help

- 42894 Removed the old CheckViewer link from the network link screen
- 42920 Added back the per item or per day options on the NSF fees in the configuration screen
- 43091 Modified the ACH inquiry screen to select the appropriate record when double clicking
- 43108 Modified the collateral comment screen to assure that all lines display on screen
- 43112 Open the CUID field for maintenance when adding a new CUID record for shared branching
- 43115 Modified a screen to allow access on online help presentation
- 43199 Modified history screen to allow check numbers with more than 4 digits to display properly
- 43253 Adjustments to eliminate error when accessing network links from a time-out window
- 43433 Correction to the OTB account inquiry access and description display from phone and inquiry
- 43434 Modification to the caching on it's Me 247 to eliminate slowness and port errors
- 43437 Correction to new AFT record maintenance where payment control is turned on to populate the next transfer date properly
- 43439 Modification to assure that all credit reports are pulled for indirect lending applications
- 43445 Recompile of the tiered service program to recognize the changes to tiered service files.
- 42417 Change to release freezes related to delinquent loans when that loan is closed
- 43435 Modification to assure that ANR fees for in-house check fee when appropriate
- 43440 Adjust national shared branching account number parsing to tighten edits and reduce messages to Operations
- 43457 Change AFT creation when adding an IRA payout record from a CD to present the 2nd screen and allow the IRA code to be entered
- 43459 Modified platform settings in CU*Admin to correct check image display in online banking for specific vendors