

16.12

Imaging Solutions Software Release

Beta	Online	In-House
n/a	December 4, 2016	December 4, 2016

What is this release?

This release is the 16.12 Imaging Solutions release for online and in-house release managed clients. Some features may not apply to both. Refer to the symbols within the document for details.

How do I get this release?



In-House Managed Clients: Imaging Solutions will be contacting you to schedule the update of your system for this release starting December 4.



Online Clients: Imaging Solutions will deploy your release on December 4. If you have any questions please email us at imaging@cuanswers.com.

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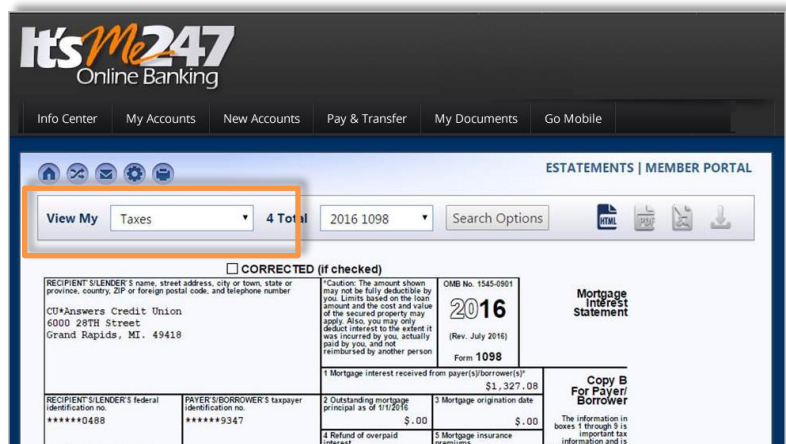
Online Tax Forms



Introducing Easy Access to Members Tax Form Statements

Beginning in January you can display members' tax forms online.

Once they are posted, members will find their tax statements under the new "Taxes" category in the "My Documents" area of **It's Me 247**. Members will be quick to adopt this new feature since eStatements are posted in the same area.



Staff will also find it easy to research a member's tax forms since they will access them the way they access the member's eStatements. Once the employee uses the "Statements" button in CU*BASE Member Inquiry, they will simply select the new "Taxes" tab to find the member's forms.

Tax statements will be loaded before the end of January, to coincide with when the printed forms are processed, and will include the following tax forms:

<ul style="list-style-type: none">• 1098• 1099-C• 1099-R• 5498• 1098-E• 1099-INT	<ul style="list-style-type: none">• 1099-SA• 5498-ESA• 1099-A• 1099-Q• 5498-SA
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NOTE: 1099-MISC forms will not be available online. You can elect to either display forms or not to display them, but it is not possible to display only certain forms. You cannot disable individual members from viewing their tax forms.

Who can use this service and how much does it cost?

*Display of tax forms is available for all credit unions who use CU*Spy for their eStatements and in-house Release Managed Clients hosting their own in-house statements. A small fee of \$500 per year is charged by the CU*Answers Imaging Solutions team to display the forms online. This fee is charged to all clients using this feature.*

Have an in-house imaging server, but are not a Release Managed client? Sign up for Release Management today and we will waive the fee for the first year! Other options are also available. Contact Imaging Solutions for details at imaging@cuanswers.com.

Learn more: [Imaging Tax Forms brochure](#)

Activation is a snap! Simply fill out and submit the form on the "Member Tax Forms: Frequently Asked Questions" website: <https://www.cuanswers.com/products/imaging-solutions/member-tax-forms/>.