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 May.

Enhancements

- 31306   Expanded loan product defaults and field-level controls for loan requests
- 31611   Who Was Served (Part 2) – Enhancements to Currently Serving
- 32512   Added tools for tracking cashed-check activity
- 35814   Updates to external loan applications and household/loan app database for reporting references
- 36579   Enhancements to speed up GL trial balance by date
- 36598   Tiered service fields are now reflecting users with mobile web activity
- 37179   Enhancement to MNCNFD, #12 to allow a partial fee when funds are in the available balance
- 37319   Created new Mobile Experience within the It's Me 247 desktop
- 37692   Added dashboard analysis for write-off information
- 37825   Dashboard Standardization (Group #4) – Added new analysis & filter tools to match new dashboard benchmarks
- 38279   Changed CDTYPE in MEMBER3 and ACHIST3 from numeric to alpha numeric to expand the number of types available
- 38455   Online Banking – Branding process improved and updated
- 38478   Added wrap up codes to the phone operator activity tracking log
- 38508   Added ATM cash transactions in BSA Monitoring
- 38559   Updated the participation loan version of the delinquent loan analysis MNCOLL #19 used for 5300 reporting
- 38560   Added options in Direct Mail Posting program for zero-balance transactions and secondary transaction descriptions.
- 38745   Enhancement to Next Suggested Product – made image/text clickable on phone/inquiry/teller screens
- 38826   Standardization of fee waivers based on presence of accts/cards – service charge fees and waivers
- 40011   Developed a new origin code 09 for wire transfers
- 40349   Addition of new dashboard for Learn-from-Peer Online Banking Password Change Analysis
- 40352   Modifications to CU*BASE to display new membership/accounts created through new MOP
- 40379   Created Smart Links configurations for reports and statements as well as eStatements for members from CU*Base
- 40420   It's Me 247 – Smart Links – Member Portal Integration
- 41085   Opened up the loan category configuration that will allow all clients access to the step-down feature for interest only loans

- 40611   Added ability for ANR (overdraft advance – courtesy pay) on accounts through Teller
- 41203   Added file export option to the automated member reach email process for Xtend for HTML emails
- 41373   Increased the maximum number of loan insurance/debt protection codes that can post in one day from 30 to 60
- 41610   Added file export option to the eStatement Notification email process for Xtend for HTML e-mails
- 41364   Updated the Payveris posting program to identify P2P transactions

Enhancements Due to Regulatory Compliance

- 37632   Added the Financial Institution ID type and ID number fields to CTR
- 40017   Mobile Web – Added NCUA/Insurance Icons for Compliance

Internal Enhancement

- 34696   Added audit file when changes are made to a CU master file
- 40380   Creation of Smart Links Dashboard to see who is utilizing which vaults for which document types

Presentation Changes

- 40974   Added three export buttons (Excel/PDF/CSV) to the Shared Branch Activity Analysis dashboard screens
- 41421   Operator Edition Screen Fixes
- 41353   Member Trans Label Analysis – Updated the label on the distribution graph from "transactions" to "members"
- 41439   Added host time to window title bar of Oper Edition GUI panels
- 41361   Applied the OPER Edition Theme to Fedline ACH Upload Panel
- 41581   Eliminated error message when downloading to excel within Where Your Members Borrow
- 41584   Escrow Disbursement is no longer dropping last 4 records from panel
- 41585   Eliminated duplication display of ISA Fee G/L input field in the online credit configuration
- 41641   Operator Edition Screen Modifications
- 41675   Updated emboss order/history screen to correctly populate messages as it does on the host screen
- 41703   Removed selection buttons from view mode screen within the targeted tiered service analysis dashboard
- 41736   Developed Operator Edition GOLD treatment for the Operations Subsystem Dashboard
- 41787   Added the operator edition theme to the panels for tax reporting
- 41821   Updated the clickable rate headers on MNMGMT #17 to display correctly
- 41932   Updated the reference library target link to be CUSO specific
- 41961   Eliminated truncation of draft #'s in NSF transaction inquiry

- 41975   Updated the Oper "Work With Active Jobs" GOLD Panel to properly display indentations of subsystem/job data
- 41993   Updated to network link targets/descriptions with CUSO specific links and non-CUSO specific verbiage
- 42109   Changed text on collateral identification screen to display as "Title status on File" instead of "title status is file"
- 42122   Updated data to appear next to the correct label on the Household Analysis stats screen
- 42129   Added a tip to CU master definition screen to explain where audit records are written for change
- 42145   Formatted the transaction amount fields to show two decimals in the teller activity screen
- 42211   Updated the inquiry screen to reflect the correct number of withdrawals on share products

Presentation Changes for Self-Processors

- 42150   Removed CUSO specific base help URL for CU*NW and added back help.cubase.org where relevant

EFT Modifications

- 37887   Mandate - MasterCard Article 585 - Effective October 14, 2016 for ALL vendors - MC using new BIN range
- 40724   The Online Block Code or Card Status User Override Flag on file PANBCA is used now to determine if a new cc card can be created
- 1160   Updated the reversal where the switch is standing-in to allow legitimate STANDIN reversal messages to post
- 41985   Added Other Phone Number in the JHA monthly full cardholder data file
- 38513   Updated DataCard CardWizard Software to 6.2 Version
- 41445   Eliminated issues with CC Cash Advance Reversals that come back through from the vendor
- 41811   Updated the changing of the funding account from a share to a checking type to send all maintenance records for the change

Internal Modifications

- 37518   Clean up of obsolete device configuration SYSTCL records
- 42092   Added monitor message in CL programs to avoid errors within the IBM PFT library for self-processors
- 42227   Corrected inefficient SQL causing CPU spikes

Imaging Internal Modifications

- 41900   Corrected Member Document Portal PDF document display issues
- 41909   Updated iDocVault ASP to correctly save the Full Name and Email Fields

Modifications

- 37995 Updated the FIDM state ID field to allow for a blank when a credit union does not participate
- 38040 Eliminated check number error on the loan disbursement screen to allow multiple CU checks to generate after a member transfer
- 41826 Updated MNMRKT #21 to prevent duplicate records from attempting to be written out during the master analysis
- 41289 Eliminated zero account transaction records in national shared branching
- 41566 Updated the selection screen in the investment maturity report (MNRPTC #19) to edit for valid dates
- 41129 Updated the group variable rate code change by increment for credit cards to use floor and ceiling rates for card master file
- 42001 Corrected program loop when updating online banking change requests
- 32913 The Credit Report is now running correctly against the decision model for a new application when only older reports are on record
- 41355 Updated mobile banking to prevent record locking when settings are changed
- 41588 Added the grand total and also listed the routing number for subtotals on report listing draft exceptions and returns. This is especially helpful when using multiple draft processors
- 41336 Updated shared branching statements to allow printing without sending statement to spooled file
- 32010 Updated stand-in logic for 360 loan payments made during the same stand-in period where monthly interest is accruing
- 35362 Updated hover help message in online banking to reflect the correct explanation of paying a credit card balance in full
- 36096 Update to prevent mass member reach emails from going out of a "never available" library
- 36209 Updated 247 lender results to correct capture the decision from previous pull or display
- 36494 When password maintenance is performed during stand in in It's My Biz, records are correctly syncing
- 37682 Updated the "Allow loans due on projection start date" to equal MM/YY to include payment dates other than the 1st of the month
- 37781 Updated programs to allow credit unions to change BINs from Visa to MasterCard, or MasterCard to Visa
- 37821 Relationship to memberships are now displaying correctly when searching global inquiry via phone op
- 37892 Updated the negative balance report to properly display records with date first negative being the current day
- 38085 Update misc programs to pull in correct positions for CD type configuration file, removing possible data decimal error
- 38138 Changed household regeneration option to disable the replace option and re-activated menu option

- 38244   Updated the warning message for changing SSN on MASTER to better describe links that may need updating
- 38313   Updated daily dormancy to fee and report status changed by activity on the last day of the month
- 38376   Eliminated port errors in It's Me 247 which were caused by using the date from an incorrect file
- 40000   Updated member statements to not repeat closed accounts
- 40012   Obsoleted origin codes 06, 12, 21, 95, 97, 98
- 40076   Modified MNLOAN #1 to allow user to enter in loan request number and move forward to loan request recap screen
- 40258   Updated retrieval of eReceipts from teller audit screen to accommodate the new shared branch receipt masking
- 40365   Added a smart link to link to item processing's idocVault page to allow the replacement of the current checkviewer link in GOLD
- 40366   Updated the on demand close member program to include update or purge of all files that the EOD close member program does
- 40491   Eliminated potential record locking in home banking
- 40494   Eliminated looping in automated check printing when there are no checks to print
- 40565   Standardization of mobile web theme files
- 40798   Enhanced edit checking on screen prompt for open payables report
- 40821   Updated the It's Me 247 loan payment estimate to include the interest rate
- 40865   Correct phone operator transfer to 360 mortgage where principle and due date are affected without applying interest or escrow
- 40896   Updated the skip payment tracker program to now add a tracker to a closed tracker
- 41023   Modifications to dormancy program updating a transaction date on an IRA updates properly
- 41075   Modified the ACH posting program to change the member status on loan to C rather than S when paying off a closed end loan that is delinquent.
- 41124   Updated the patronage dividend to automatically exclude organizational accounts in the average balance by age range
- 41185   Updated direct mail post to appropriately advance the interest date on a 360 mortgage when applying a paid ahead payment
- 41186   Updated the accounting website link in GOLD to correct link for CU*A partner
- 41187   Removed update error when attempting to update co-app status on a non-member loan application that is being deleted
- 41206   Eliminated error message when multiple programs try to create a MSNONMBR record with a 0 account base
- 41235   Updated tran description to populate special characters if entered in the account adjustment entry description
- 41333   Modified description of Concentration Rick Dashboards in GOLD search feature
- 41337   Modified the origin, tran code, and tran type for written off loan transactions

- 41374 Eliminated cursor-sensitive procedures from membership designation configuration
- 41384 Flooded fields in oper screens for smart links for the new member portal
- 41405 Adjusted tip on alternative entity reporting selection screen #2
- 41409 Updated trancode match to display properly on the ACH exception screen
- 41412 Added visibility for CD type on closed account screen
- 41459 Updated text on the collateral item summary screen to display as loan # instead of application #
- 41508 Corrected the information box that pops up when clicking next to MNGELE, #25
- 41519 Modification to verbiage on the Loan Portfolio Dashboard selection window, now reads "business unit" rather than "dividend application"
- 41550 Updated the collections dashboard to find the tracker memo type when working with delinquent OTB accounts
- 41555 Moved the "Please Wait" message for the direct mail post program to bottom of screen
- 41603 Added validation of phone numbers in the Online Banking Loan Application
- 41668 Added URL links to OPER help from CU*Base
- 41704 Update to allow negative amounts to appear correctly on the Tiered Points GOLD Screen
- 41712 Updated pop up window that accessed via the "?" button to have different text and go to new URLs
- 41755 Modified CTE GUI to send "CE" rather than "GE" to version checking program
- 41785 Updated the Escrow Disbursement listing report to list records in order by member name
- 41822 Updated the contract number on member statements for Closed LOCs
- 41836 Updated the field labels on the patronage div config screen
- 41850 Modified retrieval of client access version for GOLDREL
- 41905 Updated the CUSO-branded links for CU*Northwest to go to the correct site
- 42043 Changed the wire posting program to use the business date instead of activity date in the transaction record
- 41842 Modified retrieval/send of Learn from Peer data from production systems to be table driven
- 41976 Updated the student loan category configuration to highlight the correct field when editing for valid general ledger numbers
- 41513 Updated 1099R reporting to only output A and C records if there are B records outputted to the file
- 41966 Updated records in MSHIST with a 0 closed sequence number to the next available sequence number
- 42069 Increased total fields on the LGLACT1 report to allow for over 100,000 members to display properly
- 42144 Added a check to the Loan Delinquency Analysis report that looks for an existing credit card file before extracting the number of records in the file
- 41416 Added a check in the Online Loan App submission process for the existence of a record before trying to write one

- 41918   Updated eStatement members who are still in the promotional period to be included in the statement reconciliation table
- 42047   Eliminated program error during BOD that was due to large balances in the tiered scoring program
- 42154   Eliminated error when entering Teller/Cash Analysis button when accessed through Inquiry from Teller Processing
- 42162   Updated loans forms in the create loan account screen to print correctly when using the select feature
- 38220   Checking accounts opened in It's Me 247 are now properly being assigned a negative balance limit when the dividend application is set to default
- 41612   Updated Audit Trackers to always write out to the 000 regardless if another Audit Tracker type is opened
- 42127   The recalculate rate function key on the loan product configuration screen is now functioning properly
- 42185   Corrected the IRA posting code description on the additional transaction information screen
- 40308   Eliminated possible error in MNCOLL #1 when working with multiple selection criteria
- 42100   Optimized the transaction verification program to run faster when checking for previous posted transactions
- 42115   Updated MNUPDT, #2 to save the selection of 'No ANR Notice Printed' on a members account properly
- 42199   Added account security validation before allowing access to the verify for suspicious activity screen in Teller processing
- 40837   Eliminated error message for invalid ID when entering or updating contract number in Open End Loan Contract Screen