

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.

## Architectoral Changes

- 49117 Created a program to eliminate tools assignment for obsoleted tools.

## EFT Modifications

- 47852 Developed reverse hostcarding for Vantiv.
- 45072 STAR – Update to write the outgoing 302 card status message to the ISOSTRUCT1 file.
- 47348 COOP – Update to adjust the activations field to send a blank when requesting a PIN only.
- 48148 MANDATE Shazam – Added a new function code to data element to receive financial advice representment reversals with message type 1220.
- 48344 Update to bypass debit and credit card maintenance records when there is no longer a card record in CU\*BASE.
- 48978 Update to send phone number changes processed in inquiry to the ATM/Debit/Credit card vendor.
- 49288 Eliminated error in card control process for Fiserv when there is a reactivation card request performed.
- 47503 JHA card maintenance is no longer sending card orders when the box for card orders is deselected.
- 49094 Account balances are now updating correctly and receipts are correctly printing the updated balance after posting a shared branching transaction.

## Enhancements

- 46090 Created a program to purge OTB loan transaction data.

## Modifications

- 49078 Changed the transaction print program to eliminate the lock on MASTER and MEMBER tables.
- 49188 Updated PXACHCL to delete \$PXACH3 from QTEMP and re-

- 48562 create it, rather than replacing it.
- 48562 Print option on Dividend Quoter will now use the configured printer for the workstation.
- 49032 Added new PIB member security settings retrieval for validating against transfers, time frames, and PI changes.
- 48315 Created daily purge and history retention from API statistics table.
- 48392 Reloaded the accrual history to the web server with adjusted formatting.
- 44233 Modified DealerTrack integration to submit vehicle options and warranty costs to collateral comments for indirect loan applications.
- 45049 Updated LOC Interest Only turned to Payout to require full scheduled pay to advance the due date.
- 45618 Corrected NSF message in In House Check Overdraft protection for Xtend Shared Branching.
- 45802 Update to allow stop payments on ACH that comes in for general ledger accounts.
- 46299 Added printer selection options to the Student Loan Post Quarterly Work File.
- 46447 Updated the maturity/review date table in tool 407 to avoid entry of overlapping ranges.
- 46605 Adjusted search settings on the database search assistant.
- 46630 Updated credit reversals from merchants to hit correct bucket to allow for corrected reports and bucket balances.
- 46746 Updated the Service Charge Groups age waiver text to be consistent with the programming code that includes the configured loan and high age values.
- 47322 Update to use Upper Age Limit when calculation IRA contribution limits at BOY.
- 47341 Added command key button to launch closed account inquiry from Phone Operator main screen.
- 47407 Updated the drop-down list for credit bureau special comment codes.
- 47456 Added "Scan e-Document" button Open Payables Maintenance screen when multiple details are selected.
- 47839 When an ATM/Debit card status is changed it is now updating the Last Maint User ID in PANCARD file.
- 47841 Update to Single OFAC Scan Tool (#778) to allow for additional scans to be run before exiting the program.
- 47945 Updated credit card status screen to suppress Last Status Change User when the card has never been blocked.

- 48032 Updated logic for 360 mortgages to accommodate clients that do not offer Escrow.
- 48127 Corrected Notice Program to save original notice print date before checking for written off status.
- 48129 Added conditional title to Teller Check/Money Order screen so it doesn't read "Teller Processing – Check" when creating a money order.
- 48294 Eliminated the combined state filing option when creating a tax file.
- 48477 Added file type selection in preparation for Freddie Mac changes to investor reporting.
- 48490 Update to suppress zip code on misc. member account forms if account is flagged as a foreign address.
- 48569 Eliminated erroneous spaces within organizational names in OFAC scans.
- 48596 Changed the edits on non-membership maintenance to allow for correction to records that have the same SSN in a MASTER record.
- 48715 Adjusted the priority sequence used when posting credit card payments against multiple rate brackets.
- 44631 Eliminated erroneous offages in the Shared Branching Settlement Report when using EOM snapshot files.
- 47956 Update to allow a A2A recurring AFT that has been set up for a specified amount to continue processing the scheduled amount specified amount on the AFT until the loan is paid off or at a zero balance. Any overpayments at the end of the loan will be handled in the ACH posting system.
- 49540 Consolidated shared branch platform for FSCC to CUSC for CO-OP.

## GOLD Screen Modifications

- 48124 Added Stacked Bar Charts to GOLD and related exports within portfolio analysis – EFT Usage Dashboard.
- 48222 Expanded GOLD EFT Portfolio Dashboard Charting.
- 48258 Added Line & Stacked Column charts to GOLD and related exports for Loan Risk Score Analysis Dashboard.
- 48259 Adjusted GOLD charting to handle duplicate records.
- 48779 The select button when ordering a debit card in panel 4425 now properly works.
- 48818 Programming for Generic Kasasa Loan Agreement.
- 48853 Adjusted the work spool file command for LegaSuite 8.2.

- 48855 Restyled GOLD panels for behind the scenes Flood Configuration tools with calls to OPER help.
- 48857 The lookup for account type option now allows user to select options in LegaSuite 8.2.
- 48931 External delivery channel screen is now correctly displaying credit report pull option in GOLD.
- 48972 Updated GOLD homepage graphics.
- 49019 Updated the 'Clean Linen' GOLD theme to have darker background lettering.
- 49055 Reviewed XML Changes/Suggestions from Deluxe.
- 49062 Added selectable data buttons to trigger choice of export of common bonds in the EFT Usage Dashboard.
- 49063 Column labels are now visible on GOLD in the Money Movement Dashboard in all themes.
- 49120 Adjusted tabbed folders in Teller Verify Member window to match phone, inquiry and teller.
- 49177 The Approver ID and Approved column headings are no longer missing in GOLD when approvals are activated.
- 49225 Corrected Enter key to work correctly with selections for Loan Risk Score Analysis Report.
- 49321 Adjusted "Employee ID" description on GOLD Screen for Loan Underwriter Approval Limits.
- 49430 Loan Portfolio Analysis Dashboard – Screen Title is no longer truncated when filtering by loan category.
- 49489 Eliminated delinquency range overlap chart error from the Loan Risk Score Analysis.
- 49496 Changed GOLD logging for client access version.
- 49498 Last Contact date now appears correctly in Tool 15/3 and allows update of field.
- 49509 Corrected the communication link for checks for less check ordering.
- 49513 Update GOLD screens for Phone/Inquiry to work properly for OTB Loan Inquiry/History.

## Internal Enhancements

- 46786 Expanded FIDM process to be able to process for multiple states for one CU.

## Internal Modifications

- 47879 Removed Group ID logic from CASS processing options.

## Software Enhancements

- 45883 Created a view that combines data from the MEMBER1-6 tables with data from the OTMBST2-4 tables.
- 40973 Added a Credit Card Billing view to the EFT Dashboard
- 42088 Added option to allow for entry of beneficiary distributions on Roth IRAs for 1099-R reporting purposes.
- 43282 Created ability to track how long programs run in EOD/EOM/BOD.
- 43488 Expanded the Joint Owner's Information Within the Secondary Names Inquiry Screen.
- 44029 Created a maintenance screen to add new CUs to print cc rewards on statements.
- 44748 Added "Exclude members with written-off loans" flag and logic to member connect window.
- 45041 Added money order functionality to CU\*Base Shared Branching (CUSC etc.) Acquirer platform.
- 45222 Card Controls – notifications for ATM/Credit/Debit Card Transaction Activity.
- 45506 Employee Security Enhancements: Archiving/Locking IDs; New Copy Options, Analysis of Profiles and Tool Usage.
- 45579 Enhancements and refinements on the Payveris Subscribers dashboard.
- 45845 Creation/Design of activity validation dashboard.
- 45868 Built infrastructure to handle push notifications for mobile users from any authorized source.
- 45965 Developed Dashboard style tool for reviewing loan activity for all available employee IDs and Branches.
- 46127 Created a card number unlock feature for credit cards.
- 46168 Added AUDIT functionality to loan insurance/debt protection.
- 46198 Update to allow direct access (standalone tool) to the existing loan payoff estimator in CU\*Base.
- 46230 Added ability to default the title tracking flag to yes by collateral type.
- 46251 Addition of four new emails to member reach library.
- 46252 Addition of three new weekly email to member reach library
- 46429 Real-Time RDC Posting.
- 46430 SSO from CU\*Base to eDOC's RDC idocVAULT.
- 46488 Uncollected Funds Enhancements: Daily Aggregation of ATM holds.
- 46515 Improvements to the process for disbursing funds to escrow payees.

- 46545 SSO for Harland Clarke Check ordering both CU\*Base and It's Me 247.
- 46654 Added the ability to jump to the ATM/Debit Maintenance screen when closing an account.
- 46834 Expanded the types of joint owners in the secondary names table to include a miscellaneous owner.
- 46981 Enhancements to Accounts Payable Vendor Records.
- 47262 Enhancement to GOLD for the support of VAU and ABU; previous pan reporting.
- 47295 Changed credit card order process to allow card order without sending batch maintenance to vendor.
- 47476 Update to allow display of Vantage credit scores to members in Online Banking.
- 47730 Added export option to final version of the participation loan settlement detail report.
- 47732 Enhancement to participation loan balance verification report to allow use of the end-of month loan balances.
- 47886 Created tool for generating file query definition details on a library.
- 48420 Created an API for overdraft services.

## Warranty Modification/Adjustment

- 48589 Eliminated duplicate record error when working on a loan application.
- 49370 Phone Operator List fee is now properly updating member resulting balance.
- 48468 Change to the investment adjustment program to update the current par value properly when posting adjustments to principle.
- 49403 Eliminated an error when running the beginning of year menu option – MNOP08 option #2.
- 46361 Updated CD redemption program to post appropriately if a full redemption is opening another CD and the suffix is edited.
- 46725 Added handling for phone numbers that have preceding 0s being submitted for indirect lending.
- 46807 Correction to delinquency when paying fines on a loan allowed to be paid ahead.
- 47480 Corrected co-applicant state import from RouteOne.
- 47577 Created functionality to suspend feature for CD transfer/payment codes.
- 48118 Update to have joint owners appear when account is being

- utilized through national shared branching.
- 48618 When adding an AFT in tool 884 the lookup now handles the inquiry if invalid accounts are entered in the fields.
- 49175 When there is an update of a phone number using Phone Op, the system no longer updates the date on the General Last Maint and address maintenance date when no address changes were made.
- 49409 Eliminated error when generating preview for escrow analysis by excluding loans with semi-monthly loan payments.
- 49420 Corrected "target too small" error on Loan Payment Analysis dashboard.
- 49109 Corrected the notification message when a member changes their email address in online banking.
- 49351 Updated Tool 777 to add an edit where, if Simple Daily Calculation type is selected, then the Qualified Dividend option cannot be selected.

## Web Modifications

- 49279 It's Me 247 Mobile Web: Modified savvy money credit score links to launch SSO correctly within older versions of the mobile app.
- 49343 Eliminated 500 error in the It's Me 247 when moving from one credit union to another.