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.

EFT Modifications

- 51541   Added logic to email Site-Four Operations and Programming when excessive push notification errors occur on the Site4 box, as well as added support contact information to the email.
- 52456   For FIS and JHA card maintenance only – corrected where the emboss name is blank when the emboss name is in Name3.

Enhancements

- 45155   Created an API for Check Images.
- 45574   Created an interface for retrieving Kelly Blue Book Values.
- 46522   Added flood options for UDM custom fields to the CU-Directed Data Floods Program.
- 46874   Converted repetitive option post statement fees process to dashboard driven process.
- 47333   Added more eAlerts and enhanced existing eAlerts to add more functionality and flexibility.
- 47465   Enhancement to Teller/Vault Cash Transfers for supplemental vaults.
- 47734   Enhanced the loan product defaults to allow for months or years as a default number before maturity date.
- 47840   File Expansion – Adding a DTI (Debt to Income) to MEMBER5 and MEMBER6.
- 48142   Enhancements to General Ledger Chart of Accounts in CU*Base.
- 48374   Improvements to Share Account Dividend Rate Configuration for Tiered Rate Products.
- 48406   Added option in Debt Protection Config to have insurance code removed from account when member is XX days delinquent.
- 48630   Developed a self-enrollment process for It's Me 247 online/mobile Banking.
- 48691   Employee Security Templates & Job Class Comparison Tools: Helping Security Officers Assign CU*Base tools consistently.
- 48700   Enhancements to the credit card ordering workflow for vendors supporting multiple PANs.

- 48783   CU*Base support for HSA Certificates.
- 48805   Creation of a new escrow collateral report.
- 49044   Enhancements to Investments register/schedule.
- 49199   Enhanced new membership flow to allow entry of a member's employer information.
- 49369   Added lookup feature to work loan application status for loan product code.
- 49746   Enhancement to block checks from clearing via Teller in-house checks or ACH (to support a new eDOC "positive pay" feature).
- 49789   Implementation of eAlert API in It's Me 247 Desktop and Mobile Web.
- 49948   Expanded GOLDREL & PGOLD to add ability to collect GUAPPLE IP address.
- 50140   VAT: Added charts and exports to 1670 loan productivity analysis dashboard.
- 50422   Added account number reservation and predetermined account number specification to MOP process.
- 50524   New BSA/SAR structuring report.
- 50586   Added flags for CU*Spy reports, eDOC reports and provider ID.
- 50938   Created program which appends members' email address to a file.
- 51003   Created suppressed transaction report via canned query.
- 51151   Option to exclude a member from dormancy added the loan write off tool.
- 51156   Added button allowing user to bridge from CU*Base programs to power lines (group 3).
- 51191   Enhanced tax dashboard detail to include IRA Plan Type Field.
- 51565   Enhancements to the dormancy summary statistics window.
- 51697   Enhanced creditor resources – receive process to include screen that lists available files to retrieve.
- 47372   Enhancement to joint owner process for MAP.
- 49881   Added a new smartlink button in CU*Base to access check images via Corporate One.

GOLD Modifications

- 51387   Updated the Clean Linen GOLD Theme to have darker background lettering.
- 51391   Corrected format of 'balance' field on average rate pop up in tool #552 new/closed/all account dashboard.
- 51408   Corrected display issue on tool 253 when there is a large volume GL codes.

- 51538   Updated to display function keys properly in phone operator history screen.
- 51597   Payment change history screen is now displaying all data.
- 51514   VAT: Enhanced Loan Queue Activity Tracking Dashboard with stacked car charts to replace multiple pie charts.
- 51615   VAT: Updated excel exports to build bar charts instead of column charts when GOLD holds a bar chart.
- 51616   VAT: Added VAT charts to 141 ARU Online Banking Dashboard.
- 51618   VAT: Convert GOLD screen VAT charts to the 2D flat design.
- 51677   Changed left arrow key on Tool 658 to map to the cancel function.
- 51681   Added dynamic password tips to the password change screen in GOLD for expanded password and security rules.
- 51687   Internal display corrected for CU cross reference maintenance.
- 51692   Update to hold 'member is a minor' display after selecting "Verify My ID".
- 51713   Updated GOLD homepage graphics for the 19.10 CU*BASE release.
- 51755   Corrected the business date and activity date display for card detail information.
- 51780   Changed member gender designation to be Other rather than Unknown.
- 51805   Corrected text within phone operator accessed through teller line Posting.
- 51815   Corrected the spelling of Experian on the credit bureau pull configuration.
- 51891   Operations Certegy Card Maintenance option no longer drops to Emulator.
- 51908   Updated GOLD screen for ARU/Online Banking Minimum/Maximum Amount to now allow for 'cents' to be entered.
- 51945   Accounts payable individual approver limits are now properly displaying in GOLD on second column.
- 52072   Added up/down arrows to 840 Tiered Scoring Analysis so Goal 3 and Goal 4's second page of stats can be reached.
- 52257   Enabled 'Print' Icon for the In-House Checks Button.
- 52295   Corrected display of GOLD panel charts in Tool 200 Channel Activity by Age Group.
- 52296   Corrected column header titles not visible on some screens in the Write-off/Charge-off Dashboard.
- 52325   Updated CU*South Network Link to a new URL.
- 52420   Correction to the lookup option to assign authorized branches to teller in Tool #327.

- 52426   Updated the tab movement on the teller control/audit screen.
- 52440   Updated the tab movement on the collateral maintenance screen.
- 52448   Eliminated a GOLD error when exporting to Excel in Tools #844, 845 and 846.
- 52450   Corrected the display of the delete key in the billing request screen.

Modifications

- 51715   Change to default an 'N' within Tool #337 Define OTB Product Codes for the Auto Transfers Direct Payment Option Field for all NEW Product Codes to avoid an edit to the user for a blank field.
- 51866   Decreased archival of Verafin files from 15 days to 7 days.
- 52082   Updated extract program used for Kasasa deposit accounts to include closed share draft accounts.
- 51786   Change to clear out old CTR error messages when resending a CTR.
- 50732   Added edits to CTRs to prevent FinCEN warnings for needed correction.
- 47393   When configuration in ODP is set to allow negative after fee, transaction will post in the appropriate order.
- 50901   Eliminated issue where occasionally not all outstanding account payable items display for approval/payment.
- 51469   Added Alternate Address to Allied CPI file transmission.
- 52092   Corrected Tax information screen to eliminate possible data bleeding from other record when account is not found.
- 52236   Updated programs that create tables on the fly to create them on the SSD – internal change for processing efficiency.
- 52243   Corrected EOM indexing process for TRANS to HTRANS.
- 50397   Updated download/upload program to allow it to work for 32-bit machines.
- 51855   Verafin export – Update to exclude records in the teller files for shared branching members.
- 45989   Updated to handle Online Credit Card Deposit transactions by posting to the loan as a payment.
- 49038   Added a shortcut button to launch Tracker Review from the Phone/Inquiry TRK column.
- 49234   Eliminated 38 as a return code for draft processing.
- 49240   Added processing of ACHFEDi thru ADCHFEDz deletes of ACH work files.
- 49625   Added printer field to CUNA Loan Participation screen.
- 49800   Modified JWalk Client version checking program to allow for a

production and beta version.

- 49867 Changes to starter/replacement checks to allow CUs to delete option for starter checks when opening new checking accounts.
- 50136 Contact preferences changes (phase 1) to adapt to the new phone number database.
- 50189 Created reload processes for vendor transmissions.
- 50287 Changed the update CASS processing to process by time zone.
- 50316 Added option to Create AIRES file to include member name only.
- 50340 Expanded the 'SDN Name' column in the OFAC program so the names displayed are more complete.
- 50345 Update to membership opened with MAP to enroll member in Household.
- 50399 Added column headings/text updates to TRANLNESCQ and HTRNLNESCQ views.
- 50494 Added access to UDM (custom) fields from the Teller and Transfer Verify Member popup windows.
- 50541 Changes to new account creation to automatically flow to secondary names (regular savings/checking only).
- 50696 Wrong address handling enhancement to the card expiration/reissue processing tool.
- 50749 IMG release packaging for release management.
- 50824 Changes to phone number maintenance tool to clean up MASTER after numbers are deleted from MASTPH.
- 51043 Changed bypass option on teller drawer/audit to backup instead of opening teller drawer control when selected after buying from vault.
- 51106 Update to prevent report from running if user tries to select a task # before making a prior selection.
- 51157 Analytics Booth: Added mapping to support integration of 13 new Power Lines from the Core (group 3).
- 51278 Created the ability to access static loan pool analysis in Analytics Booth from a CU*BASE tool.
- 51329 The total number of accounts not closed report is properly displaying the total number of accounts summary as well as listing the physical accounts.
- 51336 Previous cards embossed name is no longer being carried over to next card selected on a closed account.
- 51413 Updated Experian Decision Modeling process to import auto loans as debt type auto.
- 51482 Corrected typo on GOLD screen 6532 process payment for vendors.

- 51674   Corrected bank insurance record that displays in Tool 465 when only insurance type codes are present.
- 51724   Updated screen ID in audit/online/mobile settings.
- 51907   Added the BSA ID number to the CTR edit screen.
- 50866   Adjusted IRS reporting files to include long last name where applicable.
- 52418   Added selection capability for authorized users when ordering cards in a multi-pan environment.
- 52422   Corrected the review date century when editing a loan app where the review date was configured to be hidden.
- 52446   Corrected the display of the HSA code field when disbursing a check for an HSA account through phone.

Warranty Modification/Adjustment

- 51415   Changed CTR form to populate the CALCULATED TOTALS FROM BSA DETAIL field.
- 48960   Updated Indirect Loan Reserves Report to route to printer designated in report screen.
- 49223   Corrected account number in file maintenance table when variable rate codes are updated.
- 49824   Tool usage stats feature adjusted to exclude teller, phone, inquiry as these are not driven by the normal tool process.
- 50508   Added an update/save function when adding accounts payable vendor comments.
- 50859   Eliminated record lock error in Teller.
- 50993   Updated credit card rate history date field.
- 51044   Changed report to print account info sent to credit bureau to print both reports to configured printer.
- 51083   Authorized user trade lines no longer appears in the debts on a loan application.
- 51461   Update to prevent loop in 'work with daily ACH exceptions' when trying to post a GL transaction.
- 51678   Corrected Credit Card Statement Flat File to properly print the full address line.
- 52169   Bill pay enrollment for iPay (non-legacy) in mobile will now allow user to progress past initial screen.
- 52421   Eliminated error entering a Loan Application when the maturity date has not been populated.