

Product:	Version #:	To be released to:	On date:
CU*BASE® GOLD	19.12	Online CUs	December 15, 2019
		Self-Processors	December 15, 2019

Updated booklets will be posted on our website no later than:

December 13, 2019

This release includes changes to key database tables (files). **You must update your automated Queries** prior to their next scheduled run date!

See the separate Database Changes announcement for instructions.

Key to the symbols:

- You'll see it immediately
- You'll need to activate it
- You'll need to work with a CSR to set it up
- There may be related fees; contact a CSR

INCLUDED IN THIS RELEASE

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Member Service

Following Up: Automated Tracker Purge Options Activated

Learn more: [online help](#)

What Is Changing with This Release?

As announced in CU*BASE release 19.05, we have developed a method to complete automated Tracker purges and will soon begin the process to purge data outside of the configured retention plans.

Now that you've had time to assess your Trackers, we will use this release to turn on the ability for your credit union to use **Tool #277 Configure Tracker Types** to physically configure the retention periods

for your varying Tracker types. *Note that the example shown here includes the option to archive conversations; this option is only available to credit unions with a Data Warehouse library (more on that below).*

Tracker type	AT
Tracker description	AUDIT TRACKER
Short description	AUDT

- Display in sales tracker leads and follow-ups
- Allow trackers to be copied from one membership to another
- Allow conversations to be moved from one tracker to another
- Allow trackers to be manually purged
- Allow multiple trackers of this type per membership
- Alert employees of outstanding follow-ups (Inquiry/Phone Op/Teller)

Retention period for automated purge months, minimum of months, maximum of months (7 years)

After retention period passes Purge all conversations (no archive); Archive conversations then purge

Note: This retention period includes OFAC scans for both members AND non-members.

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As a reminder, these are the Tracker retention limitations:

Tracker Type	<u>Minimum</u> Online Retention Required	<u>Maximum</u> Online Retention Period
Audit Trackers (AT)	5 years	7 years
Notice Trackers (NT)	5 years	10 years
Sales Trackers (ST)	6 months	3 years
Collections Card (XX)	10 years	Permanent
All Other Tracker Types	6 months	Permanent

Why Are We Doing This?

Did you know that of all of the data tables stored in your credit union's FILExx library, by far the ones using the most space are those that store Tracker conversations? For most credit unions Trackers represent nearly 80% of all the data you have stored about your members, *including transactions!* As a CUSO, part of our responsibility is to ensure that we are looking critically at data storage strategies to make the most of our credit unions' investment in CUSO infrastructure and growth requirements. Bottom line...it's time to clean house!

What Are the Next Steps?

After you review your configurations and set your retention periods, CU*Answers will begin with a small batch of credit unions to begin purging Tracker conversations. Since this first purge will entail purging a large volume of data, to allow us to evaluate and control the effect on system resources, the first wave of purges will take place in February for a small group of randomly selected credit unions. (If you wish to be among the first batch of credit unions, please contact a Client Service Representative for more information.)

What Will Be the Regular Purge Schedule?

Once we have completed the first wave of purges in February, the first all-credit union purge will be March 21, and again on the 3rd Saturday of each month, every month going forward.

What if I Want to Archive My Trackers?

If you are interested in retaining/archiving your trackers before they are purged, the Asterisk Intelligence team is ready to set your credit union up with a FILExxDW Data Warehouse (currently the only location to which these Trackers can be archived). Contact ai@cuanswers.com or visit the store for more information (store.cuanswers.com/product/data-warehouse-library/).



Though we will deliver reminders via Client News, **do not wait to complete your configuration adjustments and to arrange for an archival solution if needed.**

You will be notified if your credit union is selected for the initial Tracker cleanup batch, otherwise, Trackers **will** be purged beginning on March 21, and once they are gone – they are gone.

As noted in the 19.05 release, this monthly automated purge process will apply only to CU*Answers online clients. CU*NorthWest and CU*South clients will be notified about their standard retention periods by their data processor. Self-processing clients can decide whether or not to implement the new auto-purge routines or not, as desired.

Data Analyst

✔ Further Enhancements to the Online Data Dictionary

Learn more: [online help](#)

We continue to refine and enhance the information available in our online data dictionary, **Tool #332 Database Search Assistant** (shortcut: ASSIST). In each release we evaluate and tweak descriptions, add more relevant content, and make the tool an even more complete and valuable resource for our teams, both internal and at the credit union. Check it out!

Accounting/Back Office

✔ **Subsidiary Configuration Update Sets the Stage for More Development**

Learn more: [online help](#)

Thanks to the Accounting Focus Group for their assistance in this series of enhancements.

With this release we have updated all the subsidiary configuration screens, **Tool #244 Configuration CU Subsidiary Controls**, including the category, department, G/L, and vendor agent screens. Now suspend, reactivate and delete the codes from the standard listing setup, and use new lookups to find G/Ls on the G/L configuration screen.

Watch for more to come in the future, as this enhancement sets the stage for a series of other subsidiary enhancements already in the works, including a new subsidiary dashboard. Check out the Kitchen for more information. <https://www.cuanswers.com/subsidiary-processing-enhancements/>

EFT

🗺 **Reminder: Flood to Cash Back Programs Available!**

Learn more: [online help](#)

SettleMINT^{EFT}

Looking for ways to expand your credit card portfolio and to increase your credit union's transactional usage? With the credit card cash back program, not only are you rewarding your members with a percentage back, you are increasing product sales and creating lasting memberships. Whether you need assistance in creating a new program and manually enrolling members or enrolling groups of members with a flood, SettleMINT is here to assist. This release has improved the back-office functionality of the Cash Back Reward program flood options and we are eager to assist your credit union in taking advantage of this feature.

Contact SettleMINT EFT today or visit the store at <https://store.cuanswers.com/product/credit-card-cash-back/> to get started with options to create a new program or flood an existing one.

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