Beta Test Checklist

Please complete and score each task and note any comments you may have regarding each task.

Credit Union Name: MidUSA Credit Union

Primary Contact Name: Lauri Roy

Primary Contact Phone Number: 513-420-5827

Rate each item on a scale of 1-5.
(5 = highest, 1 = lowest)

5	Extremely
4	Very
3	Somewhat
2	Slightly
1	Not at all
N/A	Not applicable

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
MEMBER FACING							
Sample tool	*Sample task*	Y	3	2	4	5	*This feature will really make processing much easier for tellers.*
Its Me 247 Desktop	Please have your employees help you test the text banking feature. From online banking via desktop, see the new button called Transfer Commands. Click this button to set up your text transfers.						We have not set this up yet. Hope to set up next week.
Its Me 247 Mobile	Please have your employees help you test the text banking feature. From online banking via mobile, see the new button called Transfer Commands. Click this button to set up your text transfers.						We have not set this up yet. Hope to set up next week.
Text banking	Please have your employees help you test out the new commands to transfer from one account to another						We have not set this up yet. Hope to set up next week.
It's Me 247	If you have allowed any loan category to make principal only payments in online banking, please have someone try the new functionality from only banking. If not, please have someone try making a payment and verify that it post as expected.						

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely / 4 Very / 3 Somewhat / 2 Slightly / 1 Not at all / N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
E F T								
L E N D I N G								
476	Review the enhancement to allow a toggle between open and closed date on written off loans. Try out the sort feature by both of these selections as well.		Y	5	5	3	3	
2	Review the option to see the math behind the expense/income ratios in the loan app. Verify that the data displays as expected		Y	5	5	5	4	Nice to see the difference between percentage and dollar amount
476	Check out the written off loan dashboard where you can now toggle and sort by either open or closed date		N	5	4	3	3	Helpful in knowing where our losses are calculated
249	Check the new screen for escrow payee information that shows address and phone on the listing							Have sent emails to Sarah about issues that NMS is having.
249	Enter a payee to see the new flag to automatically advance the policy expiration date. Verify that this is set to Y as the release will default this flag on to advance dates							Have sent emails to Sarah about issues that NMS is having.
570	Check the new address information that now appears on the disbursement screen. If there are multiple collateral records, it will state this instead of the particular address. Confirm that accuracy of this data.							Have sent emails to Sarah about issues that NMS is having.
570	Take this option on an insurance escrow record and verify the new visibility of the flag. Verify that if the flag is checked to advance, it will not allow a date change unless you unlock the field.							Have sent emails to Sarah about issues that NMS is having.

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely / 4 Very / 3 Somewhat / 2 Slightly / 1 Not at all / N/A Not applicable — Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
570	Post escrow disbursements and verify that the applicable expiration dates in the escrow and collateral records update appropriately as configured by the new flag						Have sent emails to Sarah about issues that NMS is having.
458	In loan category configuration, view the new "allow principal only payments' button in the Audio/online banking tab. If possible, choose a category that you will allow members to make principal only payments						We do not offer principal only payments. May do so in the future but do not see it anytime soon
458	If you currently offer an Interest Only Line of Credit Product, in loan category definition confirm that Check Box to Switch to principal & Interest Pmt Calc type is presented in the Additional Information, Interest Only Loans- Scheduled Payment Calculation section.						
465	See the new provider option in the insurance/debt protection configuration. Add the provider information here to allow for more visibility and better analysis options. Note the additional look for this screen as well to give you more information on the first screen.						
1996	To configure the new Refi opportunity triggers, use this tool to configure which product you would like to cross sell for each type of trade line						
2/53	When processing loan applications review the debt tab to confirm that the Refinance Opportunity Highlight is appearing correctly. The highlight should only appear if the qualifying rate for the linked product is lower than the estimate interest rate of the tradeline.	Y	4	2	5	5	Not working correctly. It is not highlighting the interest rate on an auto loan where our rate is lower than the estimated. Also highlighting loans that were not setup to "trigger" such as installment loans. Great resource to use to help members and see what we can offer with our interest rate; Love this

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
	Rate each item on a scale of 1-5. **(5 = highest, 1 = lowest)** 5 Extremely / 4 Very / 3 Somewhat / 2 Slightly / 1 Not at all / N/A Not applicable						
2/53	When processing loan applications click the 'Calculate the Refi' button and work the calculations. Change Product Codes, confirm that the New Interest Rate returned is correct. Notate an offer made if applicable. Confirm offer is flagged on debt tab.	Y	5	5	5	5	Nice to help members with talking to them on a better rate we can offer if applicable
T E L L E R / M E M B E R S E R V I C E							
Inquiry/Phone	If CU*A processes your checks, view images of cleared checks directly from transaction history! Go to the transaction history, then the additional information screen on the check. Take the new button to display the image desired.	Y	5	5	5	5	Image not clear, would like to be able to print check; would like to have an option to enlarge
Timeout window	Look at the changes in the Spooled report screen. Use the various options to view, delete and move reports to desired location. Use both the individual and multiple selection options	Y	5	4	4	4	
Phone	Review the new phone transfer option to allow payment matrix overrides. If possible, try out the new features and verify the posting results for both principal only payments or those with adjustments to the payment matrix. Verify that the appropriate edits apply to assure that the amounts equal the payment amount selected.						
15	If you have a member with a last name longer than the normal field, add the information into the new field on membership maintenance. If you don't have a member with this information, see if there is an account that you can temporarily use to test this functionality along with the steps below.	Y	5	5	5	5	Nice feature but do not run into this issue very often

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
3	When opening new memberships, add long names into the new field as you're creating the account.		Y	5	5	5	5	Nice to have in case of longer names and we don't have to abbreviate
Inquiry	Inquire on a member that has a long last name entered. Verify that the name is highlighted and that the button allows you to display the full information		Y	5	5	5	5	
Phone	Inquire on a member that has a long last name entered. Verify that the name is highlighted and that the button allows you to display the full information		Y	5	5	5	5	
Teller	Enter a member that has a long last name entered and review the verify ID window. Verify that the name is highlighted and that the button allows you to display the full information		Y	5	5	5	5	
Teller, Misc Advance	Enter a member that has a long last name entered and review the verify ID window. Verify that the name is highlighted and that the button allows you to display the full information		Y	5	5	5	5	
Teller, transfer	Enter a member that has a long last name entered and review the verify ID window. Verify that the name is highlighted and that the button allows you to display the full information		Y	5	5	5	5	

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
1035	For those responsible for tracker cleanup, this is a new tool to mark a batch of follow-ups complete. If possible try out this new feature to allow to clean up old trackers that are no longer needed (most likely sales trackers). Also choose the report option and verify your results. Note: See the management section for another item for cleaning up tracker records		Y	5	3	3	3	If multiple trackers received in one day – transfer option would be to only 1 employee ID – would be nice to be able to transfer from tool #5 and select each one as an option
20	Review the maintenance screen for a credit card account and notice the new flag to turn on credit card rewards. With no program configured, please make sure that it will now allow you to check this feature on an account							
158	Users will notice a new supplemental Vault type of M for TCM on various supplemental vault screens (we don't want you to build M type vaults, just be aware of this option) Please pay attention to any issues you see when working with existing supplemental vaults especially when adding, editing, or using existing machines.							
Phone	After on-demand ACH posting is activated, use phone operator to move to the pending ACH screen and post a pending ACH credit item for a member. Verify the fee shows as configured and verify that it allows a waiver or not as configured. Review the transaction after posting to make sure it posts as expected with any additional transaction description needed. Verify the fee posting as well.		Y	5	5	5	2	
Phone	Post an ACH credit and waive the fee (if applicable, waiving the fee is a configurable option). Make sure no fees are charged to the members and that the ACH posts correctly.		Y	5	5	5	2	The waived fee report does not have a title on that page that explains what the page details. The other pages all had "Dormancy Fee", "Stop Payment Fee", "Printed Check Fee", etc.

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
Phone	If possible, post and ACH credit that has distributions set up. Make sure all distributions post as expected	Y	5	5	5	2	
Phone	When posting an ACH item, use the fee lookup to find an account type to post the fee to. Make sure the current and available balances are correct for the account.	Y	5	5	5	2	The verbiage appears to say that the fee is being deposited into a share. I believe the verbiage should be "from" not "to"
Phone	Post an ACH item and charge a fee. Add an optional secondary description for the fee and verify that the description is added to the members account.	Y	5	5	5	2	
M A N A G E M E N T							
271	See the new options for statement style fee waivers based on combined savings/loan balances. If possible, adjust your waivers based on desired selection criteria and verify fees after statement processing.						
777	If you would like to restrict certain products for certain membership designations, go to the new function key in the share account setup to set up restricted membership designations. Once completed, have your staff try opening under those designations to verify that the proper edits are working as expected. Note: Only products not allowed for online purchase will be able to have restriction placed. This can be turned off in Tool 506 if necessary						

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
705	To allow cleanup of old tracker notes, take this new option to purge any items that are no longer needed. Even if you do not want to purge records, take the audit option so that you can review and verify the results of your selection. Note: see the member service function for another cleanup option							
277	Take a look at the new retention information that shows on the tracker type definition. The actual purge will be rolled out gradually and Asterisk Intelligence will be connection with clients for archival options if desired. However, please review the defaulted retention periods and start thinking about how you might want to manage your retention to ready yourself for this new functionality							
569	Go to online banking configuration and choose the online banking password and security settings. These have now been moved to your access to allow you to control your settings without the need to contact CU*A. Check your settings here to see how they are currently working. If you want to make adjustments, you can do so here.							
569	Go to the text banking configuration to turn on transfers via text banking							We have not set this up yet. Hope to set up next week.
777 and 458	When text banking is turned on, configure those DIVAPLS and loan categories where you would like to allow transfers visa this method							We have not set this up yet. Hope to set up next week.

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
OPER	Contact CU*A to setup the option to Allow pending ACH items to be posted for individual members.							
569	Once the option to allow pending ACH items to be posted is configured, Setup a fee (it can be 0.00), description, and general ledger for ACH On-Demand Posting. The ACH items will be posted through phone operator							
A U D I T								
1700	Check out the new Teller Audit Analysis Dashboard. This new tool gives the user the ability to see teller transactions for the previous business day up to 3 months without accessing the teller control option! Check out the sorts and filter options to audit transactions in general and search for specific transactions.							
369	After month end, review the fee income/waivers dashboard for the new Fee Type of ACHFE. Verify that the totals charged and waived are reasonable.							
B A C K O F F I C E								

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
986, maintenance	When working with draft exceptions, use the new view check feature to verify your maintenance of the exception item							
406 and 993	Access these investment tools to review the new analysis feature on your investment portfolio. Use the various lookups and graphical information for the different data elements.							
S E C U R I T Y A D M I N I S T R A T O R								
D A T A B A S E A D M I N I S T R T O R								
758	Check out the updates screen in the Report Automation for Custom Reports and Files that now compares the saved query definition to the current query definition. Just click/select one of the queries in the list and then click View. If the current query definition differs from the saved definition, you will see a side by side comparison showing you the differences between the two.							

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
1210	Check out the two new types of flood options. Payment/Delinquent Control Option Flood and the Variable Rate Code (Closed End Loans) and Variable Rate Code (Line of Credit Loan). Consult with the Analytics Team before flooding members.						
1980	Review this dashboard to see the new search features and information on file authority. Try out the new Query Table feature to view the table.						
1980	Review this option to see the enhancements for more specific information on the size of your libraries. Use the Change scale feature to see the information in all scales						
1310	Review this option to see the enhancements for more specific information on the size of your libraries. Use the Change scale feature to see the information in all scales						
817	Review the changes to the skip payment history dashboard. Toggle between interest paid and payment amount. Verify data.	Y	4	4	3	4	Good information to see
1730	Plan out how you would like to track fraud information. Go to this tool to configure the "types" of fraud that you would like to track for analysis						

Rate each item on a scale of 1-5.
(5 = highest, 1 = lowest)

5	Extremely
4	Very
3	Somewhat
2	Slightly
1	Not at all
N/A	Not applicable

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
1720	Plan out how you would like to track fraud information. Go to this tool to configure what statues you would like to use							
1715	Use this tool to start adding incidents of fraud, either historical or current. This will allow you to keep this data on hand for future analysis							
1710	Use this tool to view all the information on fraud entered in the system.							

G E N E R A L   C O M M E N T S

Beta Test Checklist

Please complete and score each task and note any comments you may have regarding each task.

Credit Union Name: *Pathways Financial*

Primary Contact Name: *J. L. Thomas*

Primary Contact Phone Number: *604·416·7588 x 1230*

Rate each item on a scale of 1-5.
(5 = highest, 1 = lowest)

		5	Extremely
		4	Very
		3	Somewhat
		2	Slightly
		1	Not at all
		N/A	Not applicable

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
MEMBER FACING							
Sample tool	*Sample task*	*Y*	*3*	*2*	*4*	*5*	*This feature will really make processing much easier for tellers.*
Its Me 247 Desktop	Please have your employees help you test the text banking feature. From online banking via desktop, see the new button called Transfer Commands. Click this button to set up your text transfers.	Y	4	5	4	5	Very Cool
Its Me 247 Mobile	Please have your employees help you test the text banking feature. From online banking via mobile, see the new button called Transfer Commands. Click this button to set up your text transfers.	Y	4	5	4	5	
Text banking	Please have your employees help you test out the new commands to transfer from one account to another	4	4	4	5	4	
It's Me 247	If you have allowed any loan category to make principal only payments in online banking, please have someone try the new functionality from only banking. If not, please have someone try making a payment and verify that it post as expected.						N/A

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating

Rate each item on a scale of 1-5.
(5 = highest, 1 = lowest)
5 Extremely
4 Very
3 Somewhat
2 Slightly
1 Not at all
N/A Not applicable

E F T

L E N D I N G

Tool	Task	Y/N	1-5	1-5	1-5	1-5	Comments
476	Review the enhancement to allow a toggle between open and closed date on written off loans. Try out the sort feature by both of these selections as well.	Y	3	4	5	5	
2	Review the option to see the math behind the expense/income ratios in the loan app. Verify that the data displays as expected						N/A - use Mordon Link
476	Check out the written off loan dashboard where you can now toggle and sort by either open or closed date	Y	4	5	4	5	Very cool sort and dice
249	Check the new screen for escrow payee information that shows address and phone on the listing	Y	3	5	4	4	
249	Enter a payee to see the new flag to automatically advance the policy expiration date. Verify that this is set to Y as the release will default this flag on to advance dates	Y	5	5	4	5	
570	Check the new address information that now appears on the disbursement screen. If there are multiple collateral records, it will state this instead of the particular address. Confirm that accuracy of this data.	Y	4	5	5	4	
570	Take this option on an insurance escrow record and verify the new visibility of the flag. Verify that if the flag is checked to advance, it will not allow a date change unless you unlock the field.	Y	4	4	5	4	

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
570	Post escrow disbursements and verify that the applicable expiration dates in the escrow and collateral records update appropriately as configured by the new flag						*Did not test*
458	In loan category configuration, view the new "allow principal only payments' button in the Audio/online banking tab. If possible, choose a category that you will allow members to make principal only payments						
458	If you currently offer an Interest Only Line of Credit Product, in loan category definition confirm that Check Box to Switch to principal & Interest Pmt Calc type is presented in the Additional Information, Interest Only Loans- Scheduled Payment Calculation section.						
465	See the new provider option in the insurance/debt protection configuration. Add the provider information here to allow for more visibility and better analysis options. Note the additional look for this screen as well to give you more information on the first screen.						
1996	To configure the new Refi opportunity triggers, use this tool to configure which product you would like to cross sell for each type of trade line	Y	4	3	4	4	ML
2/53	When processing loan applications review the debt tab to confirm that the Refinance Opportunity Highlight is appearing correctly. The highlight should only appear if the qualifying rate for the linked product is lower than the estimate interest rate of the tradeline.						

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
2/53	When processing loan applications click the 'Calculate the Refi' button and work the calculations. Change Product Codes, confirm that the New Interest Rate returned is correct. Notate an offer made if applicable. Confirm offer is flagged on debt tab.							

T E L L E R / M E M B E R   S E R V I C E

Tool	Task		Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
Inquiry/Phone	If CU*A processes your checks, view images of cleared checks directly from transaction history! Go to the transaction history, then the additional information screen on the check. Take the new button to display the image desired.							N/A
Timeout window	Look at the changes in the Spooled report screen. Use the various options to view, delete and move reports to desired location. Use both the individual and multiple selection options		Y	4	5	5	5	Much Needed
Phone	Review the new phone transfer option to allow payment matrix overrides. If possible, try out the new features and verify the posting results for both principal only payments or those with adjustments to the payment matrix. Verify that the appropriate edits apply to assure that the amounts equal the payment amount selected.							
15	If you have a member with a last name longer than the normal field, add the information into the new field on membership maintenance. If you don't have a member with this information, see if there is an account that you can temporarily use to test this functionality along with the steps below.							

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3	When opening new memberships, add long names into the new field as you're creating the account.		4	1	5	5	5	I got 15 spaces
Inquiry	Inquire on a member that has a long last name entered. Verify that the name is highlighted and that the button allows you to display the full information		4	5	6	5	5	Showed Partut
Phone	Inquire on a member that has a long last name entered. Verify that the name is highlighted and that the button allows you to display the full information		4	5	5	5	5	
Teller	Enter a member that has a long last name entered and review the verify ID window. Verify that the name is highlighted and that the button allows you to display the full information		4	4	5	4	5	
Teller, Misc Advance	Enter a member that has a long last name entered and review the verify ID window. Verify that the name is highlighted and that the button allows you to display the full information		4	4	5	4	5	
Teller, transfer	Enter a member that has a long last name entered and review the verify ID window. Verify that the name is highlighted and that the button allows you to display the full information		4	4	5	4	5	

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1035	For those responsible for tracker cleanup, this is a new tool to mark a batch of follow-ups complete. If possible try out this new feature to allow to clean up old trackers that are no longer needed (most likely sales trackers). Also choose the report option and verify your results. Note: See the management section for another item for cleaning up tracker records							
20	Review the maintenance screen for a credit card account and notice the new flag to turn on credit card rewards. With no program configured, please make sure that it will now allow you to check this feature on an account							
158	Users will notice a new supplemental Vault type of M for TCM on various supplemental vault screens (we don't want you to build M type vaults, just be aware of this option) Please pay attention to any issues you see when working with existing supplemental vaults especially when adding, editing, or using existing machines.							
Phone	After on-demand ACH posting is activated, use phone operator to move to the pending ACH screen and post a pending ACH credit item for a member. Verify the fee shows as configured and verify that it allows a waiver or not as configured. Review the transaction after posting to make sure it posts as expected with any additional transaction description needed. Verify the fee posting as well.							
Phone	Post an ACH credit and waive the fee (if applicable, waiving the fee is a configurable option). Make sure no fees are charged to the members and that the ACH posts correctly.							

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Phone	If possible, post and ACH credit that has distributions set up. Make sure all distributions post as expected							
Phone	When posting an ACH item, use the fee lookup to find an account type to post the fee to. Make sure the current and available balances are correct for the account.							
Phone	Post an ACH item and charge a fee. Add an optional secondary description for the fee and verify that the description is added to the members account.							

M A N A G E M E N T

Tool	Task		Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
271	See the new options for statement style fee waivers based on combined savings/loan balances. If possible, adjust your waivers based on desired selection criteria and verify fees after statement processing.							
777	If you would like to restrict certain products for certain membership designations, go to the new function key in the share account setup to set up restricted membership designations. Once completed, have your staff try opening under those designations to verify that the proper edits are working as expected. Note: Only products not allowed for online purchase will be able to have restriction placed. This can be turned off in Tool 506 if necessary							

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable						
705	To allow cleanup of old tracker notes, take this new option to purge any items that are no longer needed. Even if you do not want to purge records, take the audit option so that you can review and verify the results of your selection. Note: see the member service function for another cleanup option						
277	Take a look at the new retention information that shows on the tracker type definition. The actual purge will be rolled out gradually and Asterisk Intelligence will be connection with clients for archival options if desired. However, please review the defaulted retention periods and start thinking about how you might want to manage your retention to ready yourself for this new functionality						
569	Go to online banking configuration and choose the online banking password and security settings. These have now been moved to your access to allow you to control your settings without the need to contact CU*A. Check your settings here to see how they are currently working. If you want to make adjustments, you can do so here.						
569	Go to the text banking configuration to turn on transfers via text banking						
777 and 458	When text banking is turned on, configure those DIVAPLS and loan categories where you would like to allow transfers visa this method						

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
OPER	Contact CU*A to setup the option to Allow pending ACH items to be posted for individual members.							
569	Once the option to allow pending ACH items to be posted is configured, Setup a fee (it can be 0.00), description, and general ledger for ACH On-Demand Posting. The ACH items will be posted through phone operator							
A U D I T								
1700	Check out the new Teller Audit Analysis Dashboard. This new tool gives the user the ability to see teller transactions for the previous business day up to 3 months without accessing the teller control option! Check out the sorts and filter options to audit transactions in general and search for specific transactions.							
369	After month end, review the fee income/waivers dashboard for the new Fee Type of ACHFE. Verify that the totals charged and waived are reasonable.							
B A C K O F F I C E								

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
986, maintenance	When working with draft exceptions, use the new view check feature to verify your maintenance of the exception item							
406 and 993	Access these investment tools to review the new analysis feature on your investment portfolio. Use the various lookups and graphical information for the different data elements.							
SECURITY ADMINISTRATOR								
DATABASE ADMINISTRTOR								
758	Check out the updates screen in the Report Automation for Custom Reports and Files that now compares the saved query definition to the current query definition. Just click/select one of the queries in the list and then click View. If the current query definition differs from the saved definition, you will see a side by side comparison showing you the differences between the two.							

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
1210	Check out the two new types of flood options. Payment/Delinquent Control Option Flood and the Variable Rate Code (Closed End Loans) and Variable Rate Code (Line of Credit Loan). Consult with the Analytics Team before flooding members.							
1980	Review this dashboard to see the new search features and information on file authority. Try out the new Query Table feature to view the table.							
1980	Review this option to see the enhancements for more specific information on the size of your libraries. Use the Change scale feature to see the information in all scales							
1310	Review this option to see the enhancements for more specific information on the size of your libraries. Use the Change scale feature to see the information in all scales							
817	Review the changes to the skip payment history dashboard. Toggle between interest paid and payment amount. Verify data.							
1730	Plan out how you would like to track fraud information. Go to this tool to configure the "types" of fraud that you would like to track for analysis							

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Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
1720	Plan out how you would like to track fraud information. Go to this tool to configure what statues you would like to use							
1715	Use this tool to start adding incidents of fraud, either historical or current. This will allow you to keep this data on hand for future analysis							
1710	Use this tool to view all the information on fraud entered in the system.							

GENERAL COMMENTS

Beta Test Checklist

Please complete and score each task and note any comments you may have regarding each task.

Credit Union Name: **Shoreline Credit Union**

Primary Contact Name: **Nathan Grossenbach/Steve Haensgen**

Primary Contact Phone Number: **920-482-3765,920-482-3700**

Thank you for helping us test the software improvements of release 19.05!

Rate each item on a scale of 1-5.
(5 = highest, 1 = lowest)

5	Extremely
4	Very
3	Somewhat
2	Slightly
1	Not at all
N/A	Not applicable

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
MEMBER FACING							
Sample tool	*Sample task*	*Y*	*3*	*2*	*4*	*5*	*This feature will really make processing much easier for tellers.*
Its Me 247 Desktop Tyler & Slim	Please have your employees help you test the text banking feature. From online banking via desktop, see the new button called Transfer Commands. Click this button to set up your text transfers.	Y	4	5	3	3	While the idea is convenient and easy, there could be more direction on the site itself. It was easy to set up commands, but if someone did not know the previous general commands, it may be hard for them to figure out how to text with the custom command. (I needed slims help) I feel there may be miscommunication.
Its Me 247 Mobile Tyler & Slim	Please have your employees help you test the text banking feature. From online banking via mobile, see the new button called Transfer Commands. Click this button to set up your text transfers	Y	5	5	5	5	After doing the desktop version first, I knew how to do it and it was easy to get it set up and it worked well on mobile.
Text banking Tyler & Slim	Please have your employees help you test out the new commands to transfer from one account to another	Y	5	5	5	5	While it is easy to use, I am unsure that this will be beneficial to roll out to the members. I do not know that it will be used enough. Especially with our app.

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Tool	Task	Did you complete the task? (Y/N)	How easy was the task? (1-5)	Are you satisfied with the results you received? (1-5)	How helpful will the task be to staff? (1-5)	How likely are you to perform the task after beta? (1-5)	Comments/ Explanation of Rating
It's Me 247 Kal & Slim	If you have allowed any loan category to make principal only payments in online banking, please have someone try the new functionality from only banking. If not, please have someone try making a payment and verify that it post as expected.	y	5	5	N/A	1	Not going to allow this.
E F T							
L E N D I N G							
476 Kal/Denece	Review the enhancement to allow a toggle between open and closed date on written off loans. Try out the sort feature by both of these selections as well.	y	5	4	3	3	
2 Kal/CLs	Review the option to see the math behind the expense/income ratios in the loan app. Verify that the data displays as expected	y	5	5	4	4	
476 Kal/Denece	Check out the written off loan dashboard where you can now toggle and sort by either open or closed date	y	5	5	5	4	
249 Kal/Linda/Desi	Check the new screen for escrow payee information that shows address and phone on the listing	Y	5	5	3	4	
249 Kal/Linda	Enter a payee to see the new flag to automatically advance the policy expiration date. Verify that this is set to Y as the release will default this flag on to advance dates	Y	5	5	2	2	
570 Kal/Kay?/Desi?	Check the new address information that now appears on the disbursement screen. If there are multiple collateral records, it will state this instead of the particular address. Confirm that accuracy of this data.	Y	5	5	4	4	

Rate each item on a scale of 1-5.
(5 = highest, 1 = lowest)

5	Extremely
4	Very
3	Somewhat
2	Slightly
1	Not at all
N/A	Not applicable

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
570 Kal/Linda	Take this option on an insurance escrow record and verify the new visibility of the flag. Verify that if the flag is checked to advance, it will not allow a date change unless you unlock the	Y	4	4	3	4	
570 Kal/Linda	Post escrow disbursements and verify that the applicable expiration dates in the escrow and collateral records update appropriately as configured by the new flag	Y	5	4	3	4	
458 Kal/Slim	In loan category configuration, view the new "allow principal only payments' button in the Audio/online banking tab. If possible, choose a category that you will allow members to make principal only payments	Y	5	5	2	2	Don't want to turn on as I feel it will create more headaches than it will solve.
458 N/A	If you currently offer an Interest Only Line of Credit Product, in loan category definition confirm that Check Box to Switch to principal & Interest Pmt Calc type is presented in the Additional Information, Interest Only Loans- Scheduled Payment Calculation section.	NA					Do something similar for lines so we can set up a draw period and payment and a repayment period and payment.
465 Kal/linda	See the new provider option in the insurance/debt protection configuration. Add the provider information here to allow for more visibility and better analysis options. Note the additional look for this screen as well to give you more information on the first screen.	Y	5	5	2	4	All our coverages are with one provider. If we ever add a new or 2nd provider then this might be handy.
1996 Kal/Linda	To configure the new Refi opportunity triggers, use this tool to configure which product you would like to cross sell for each type of trade line	Y	5	5	5	5	Setup and tried on existing loan. Have not yet actually tried to create the new refi loan. I have asked my LO's to do so.
2/53 Kal/Linda	When processing loan applications review the debt tab to confirm that the Refinance Opportunity Highlight is appearing correctly. The highlight should only appear if the qualifying rate for the linked product is lower than the estimate interest rate of the tradeline.	Y	5	5	5	5	I like it.

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
2/53 Kal/Linda	When processing loan applications click the 'Calculate the Refi' button and work the calculations. Change Product Codes, confirm that the New Interest Rate returned is correct. Notate an offer made if applicable. Confirm offer is flagged on debt tab.	Y	5	5	5	5	Set up and tried. See 1996 above.
T E L L E R / M E M B E R S E R V I C E							
Inquiry/Phone N/A	If CU*A processes your checks, view images of cleared checks directly from transaction history! Go to the transaction history, then the additional information screen on the check. Take the new button to display the image desired.	N/A					Our Processor is Associated Bank
Timeout window Nathan/Slim	Look at the changes in the Spooled report screen. Use the various options to view, delete and move reports to desired location. Use both the individual and multiple selection options	Y	3	5	2	5	The spools are limited to one or two employees at the credit union, as the process is still relatively complex. BUT the layout makes the process so much easier, and the sort option is so nice to have.
Phone Lisa/Sheng	Review the new phone transfer option to allow payment matrix overrides. If possible, try out the new features and verify the posting results for both principal only payments or those with adjustments to the payment matrix. Verify that the appropriate edits apply to assure that the amounts equal the payment amount selected.	Y	3	4	5	4	Instructions weren't very clear. You need to enter transaction info before new features pop up.
15 Lisa/Kelly/Brandon/Rhonda Ever/Steph	If you have a member with a last name longer than the normal field, add the information into the new field on membership maintenance. If you don't have a member with this information, see if there is an account that you can temporarily use to test this functionality along with the steps below.						

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Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
3 Lisa (etc.)	When opening new memberships, add long names into the new field as you're creating the account.							
Inquiry Lisa	Inquire on a member that has a long last name entered. Verify that the name is highlighted and that the button allows you to display the full information							
Phone Lisa	Inquire on a member that has a long last name entered. Verify that the name is highlighted and that the button allows you to display the full information							
Teller Kelly/Brandon	Enter a member that has a long last name entered and review the verify ID window. Verify that the name is highlighted and that the button allows you to display the full information							
Teller, Misc Advance Kelly/Brandon	Enter a member that has a long last name entered and review the verify ID window. Verify that the name is highlighted and that the button allows you to display the full information							
Teller, transfer Kelly/Brandon	Enter a member that has a long last name entered and review the verify ID window. Verify that the name is highlighted and that the button allows you to display the full information							

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely, 4 Very, 3 Somewhat, 2 Slightly, 1 Not at all, N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
1035 Nathan	For those responsible for tracker cleanup, this is a new tool to mark a batch of follow-ups complete. If possible try out this new feature to allow to clean up old trackers that are no longer needed (most likely sales trackers). Also choose the report option and verify your results. Note: See the management section for another item for cleaning up tracker records							
20 Kal/Kay	Review the maintenance screen for a credit card account and notice the new flag to turn on credit card rewards. With no program configured, please make sure that it will now allow you to check this feature on an account	Na					This is all handled in PSCU and not in CUA.
158 Nathan/Lisa	Users will notice a new supplemental Vault type of M for TCM on various supplemental vault screens (we don't want you to build M type vaults, just be aware of this option) Please pay attention to any issues you see when working with existing supplemental vaults especially when adding, editing, or using existing							
Phone Slim/Brad	After on-demand ACH posting is activated, use phone operator to move to the pending ACH screen and post a pending ACH credit item for a member. Verify the fee shows as configured and verify that it allows a waiver or not as configured. Review the transaction after posting to make sure it posts as expected with any additional transaction description needed. Verify the fee posting as well.	Y	5	4	3	3	All screens were as expected. Pending transaction was allowed to post on demand, fee amount appeared as set up and posted accordingly.
Phone Slim/Brad	Post an ACH credit and waive the fee (if applicable, waiving the fee is a configurable option). Make sure no fees are charged to the members and that the ACH posts correctly.	Y	5	3	3	3	Checking the "waive fee" box alone did not waive it. Had to check box and hit enter before posting.

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
Phone Slim/Brad	If possible, post and ACH credit that has distributions set up. Make sure all distributions post as expected		Y	5	5	3	3	All distributions were successful
Phone Slim/Brad	When posting an ACH item, use the fee lookup to find an account type to post the fee to. Make sure the current and available balances are correct for the account.		Y	5	5	3	3	The lookup feature allowed the selection of any suffix under that account. Defaulted to the 0000, can it be defaulted to the suffix of deposit?
Phone Slim?Brad	Post an ACH item and charge a fee. Add an optional secondary description for the fee and verify that the description is added to the members account.		Y	5	5	3	3	Test successful
M A N A G E M E N T								
271 Nathan/N/A	See the new options for statement style fee waivers based on combined savings/loan balances. If possible, adjust your waivers based on desired selection criteria and verify fees after statement processing.		Y	5	3	1	1	We do not currently charge for printed statements, but this will be a good thing to keep in mind for the future to weed out the lower-use members.
777 Sara	If you would like to restrict certain products for certain membership designations, go to the new function key in the share account setup to set up restricted membership designations. Once completed, have your staff try opening under those designations to verify that the proper edits are working as expected. Note: Only products not allowed for online purchase will be able to have restriction placed. This can be turned off in Tool 506 if necessary		Y	5	5	5	5	I like the tool as we will be able to limit the products offered to specific membership designations. However, wish it would be able to work for products offered online as well.

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely / 4 Very / 3 Somewhat / 2 Slightly / 1 Not at all / N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
705 Nathan	To allow cleanup of old tracker notes, take this new option to purge any items that are no longer needed. Even if you do not want to purge records, take the audit option so that you can review and verify the results of your selection. Note: see the member service function for another cleanup option							
277 Nathan	Take a look at the new retention information that shows on the tracker type definition. The actual purge will be rolled out gradually and Asterisk Intelligence will be connection with clients for archival options if desired. However, please review the defaulted retention periods and start thinking about how you might want to manage your retention to ready yourself for this new functionality							
569 Nathan	Go to online banking configuration and choose the online banking password and security settings. These have now been moved to your access to allow you to control your settings without the need to contact CU*A. Check your settings here to see how they are currently working. If you want to make adjustments, you can do so here.		Y	5	5	5	5	Great to see this for the member-side… but when will see this for employees? We've been written up several exams in a row because of the default x1234!
569 Nathan (ASAP)	Go to the text banking configuration to turn on transfers via text banking		Y	5	5	3	4	Members aren't heavy users of text banking, so this won't be a priority right off the bat. Plus most of our members are 60+, and probably wouldn't understand the concept of custom instructions. Very cool tool for those who
777 and 458 Nathan (ASAP)	When text banking is turned on, configure those DIVAPLS and loan categories where you would like to allow transfers visa this method		Y	5	5	5	4	Same as above.

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
OPER Slim/Brad (ASAP)	Contact CU*A to setup the option to Allow pending ACH items to be posted for individual members.		Y	5	5	3	3	Done
569 Slim/Brad (ASAP)	Once the option to allow pending ACH items to be posted is configured, Setup a fee (it can be 0.00), description, and general ledger for ACH On-Demand Posting. The ACH items will be posted through phone operator		Y	5	5	3	3	Done
A U D I T								
1700 Lisa/Sara/Brandon/Kelly	Check out the new Teller Audit Analysis Dashboard. This new tool gives the user the ability to see teller transactions for the previous business day up to 3 months without accessing the teller control option! Check out the sorts and filter options to audit transactions in general and search for specific transactions.							
369 Slim/Brad	After month end, review the fee income/waivers dashboard for the new Fee Type of ACHFE. Verify that the totals charged and waived are reasonable.		N					Will need to wait until after close of April to review.
B A C K O F F I C E								

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Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
986, maintenance N/A	When working with draft exceptions, use the new view check feature to verify your maintenance of the exception item		N/A					Our Processor is Associated Bank
406 and 993 Slim/Brad	Access these investment tools to review the new analysis feature on your investment portfolio. Use the various lookups and graphical information for the different data elements.		Y	5	3	1	1	We currently have 60+ investments, it would take a significant amount of time to create these. If there were an Import from excel feature we would be more inclined to use this.
SECURITY ADMINISTRATOR								
DATABASE ADMINISTRTOR								
758 Nathan	Check out the updates screen in the Report Automation for Custom Reports and Files that now compares the saved query definition to the current query definition. Just click/select one of the queries in the list and then click View. If the current query definition differs from the saved definition, you will see a side by side comparison showing you the differences between the two.							

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
1210 Kal	Check out the two new types of flood options. Payment/Delinquent Control Option Flood and the Variable Rate Code (Closed End Loans) and Variable Rate Code (Line of Credit Loan). Consult with the Analytics Team before flooding members.		NA					
1980 Nathan	Review this dashboard to see the new search features and information on file authority. Try out the new Query Table feature to view the table.		Y	5	5	4	5	**Limited use tool, but it is great to view the file, the date last used in one screen. I wasn't sure of a way to do this before, if it even was possible.**
1980 Nathan	Review this option to see the enhancements for more specific information on the size of your libraries. Use the Change scale feature to see the information in all scales		Y	5	5	4	5	**Great tool for me to use, or maybe our IT tech. Best part is being able to view and delete right from this screen those larger, unused files.**
1310 Nathan	Review this option to see the enhancements for more specific information on the size of your libraries. Use the Change scale feature to see the information in all scales		Y	5	5	2	3	**It's good info to manage, but I'm not sure what the applicability is. Do we have limits on how much storage we can have? Does the larger size impact the**
817 Kal	Review the changes to the skip payment history dashboard. Toggle between interest paid and payment amount. Verify data.		NA					**We have not allowed this as of yet.**
1730 Lisa/Slim	Plan out how you would like to track fraud information. Go to this tool to configure the "types" of fraud that you would like to track for analysis		Y	5	5	5	5	**Easy to Create Types of Fraud**

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Comments/ Explanation of Rating
1720 Slim/Lisa	Plan out how you would like to track fraud information. Go to this tool to configure what statues you would like to use		Y	5	5	5	5	**Will be useful in tracking stages of each fraud case**
1715 Slim/Lisa	Use this tool to start adding incidents of fraud, either historical or current. This will allow you to keep this data on hand for future analysis							
1710 Slim/Lisa	Use this tool to view all the information on fraud entered in the system.							

G E N E R A L   C O M M E N T S