

# CU\*BASE 20.11 Release Resource Companion

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**CU\*ANSWERS**  
*The Writing Team*

This edition of the Release Resource Companion covers new and updated materials related to the 20.11 Release of CU\*BASE. Take a look at the topics below to view updates to the CU\*BASE software, booklets and additional resources, all collected in one convenient document for your staff!

## New Video!

### **CD Secured Loan Offers Video Overview**

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CD Secured Loan offers allow you to give members the same 'Yes' online as you would in person. These are low-risk loans – members simply need to select 'Get Loan' in **It's Me 247** to begin the process. [Watch the video!](#)

## New Booklets!

### **CLR Path Decision Advisor**

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Evaluate the strength of your relationship with your members based on what is already available in CU\*BASE. Give loan approval recommendations without the need to pull (or pay for) a credit score. [For more details, click here.](#)

### **CD Secured Loans**

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CD Secured Loans are low-risk loans that you can offer directly to members via **It's Me 247** online and mobile banking, with no underwriting, no credit check and no need for your underwriters to even get involved. [For more details, click here.](#)

### **Fraud Block List Supplemental Guide**

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Block Lists create a centralized place to see and stop activity based on patterns your credit union sees as risky or potentially fraudulent. [Click here for more information.](#)

### **Online Credit Bureau Access and FUEL – Configuring FUEL and the Approval Matrix**

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This booklet provides instructions for all of the configuration steps necessary to set up CU\*BASE for using the FUEL automated decision model. [Click here for more information.](#)

### **Online Credit Bureau Access and FUEL – User Guide**

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This booklet explains how to use the CU\*BASE Online Credit Bureau Access system and FUEL features as you create loan requests, open new accounts, cross-sell products and services, and work day to day with members. [Click here for more information.](#)

## **New AnswerBook Items!**

*Includes 23 FAQ items for CLR Path Decision Advisor, 15 FAQ items for CD Secured Offers and 27 FAQ items for Fraud Block Lists!*

### **FAQ List: CLR Path Decision Advisor**

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Frequently asked questions for CLR Path Decision Advisor include:

- When is CLR Path Run?
- What are the supported loan types for the CLR Path Advisor?
- Does CLR Path support automatic approvals?
- What counts as a passing CLR Path score?

And more! [Click here to view a full list of frequently asked questions for this topic.](#)

### **FAQ List: CD Secured Loan Offers**

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Frequently asked questions for CD Secured Loan Offers include:

- How does the freeze on CD Secured Loans work?
- Can we charge a fee for the CD Secured Loans service?
- What determines the term, amount and rate of a CD Secured Loan?
- Are there any restrictions on the Certificate Types or Loan Products that can be used with CD Secured Loans?

And more! [Click here to view a full list of frequently asked questions for this topic.](#)

### **FAQ List: Fraud Block Lists**

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Frequently asked questions for Fraud Block Lists include:

- How do I access all the fraud block lists in CU\*BASE?
- Can and should I add a person or organization to multiple block lists at the same time?
- How is a denial of service fraud block list different than a transaction attribute fraud block list?

And more! [Click here to view a full list of frequently asked questions for this topic.](#)

## **New Online Help Overview Topics!**

### **Overview: CLR Path Decision Advisor**

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This help topic details CLR Path Decision Advisor, how to configure a CLR Path Program Templates, attaching program templates to a loan product and more. [Click here to read this topic.](#)

### **Overview: CD Secured Loans**

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This help topic details CD Secured Loans including the member experience, how to configure a CD Secured Loan, preparing loan forms and more. [Click here to read this topic.](#)

### **Overview: Fraud Block Lists**

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This help topic details Fraud Block Lists including Single Channel Denial of Service

Block Lists and Multi-Channel Transaction Attribute Block Lists, as well as tables used by these Block Lists. [Click here to read this topic.](#)

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## Updated AnswerBook Items

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### ***How can I personalize my CU\*BASE home page?***

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Want to customize the look and actions available on your CU\*BASE homepage? [Learn more!](#)

### ***How do I organize my favorite CU\*BASE tools?***

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Use this screen to create a new group of favorite tools, delete an existing group of favorite tools, or edit a group of tools. [Learn more!](#)

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## Updated Booklets – Fraud Block Lists

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### ***1Click Offers***

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You can now exclude persons and organizations on the lending fraud block list from receiving 1Click Offers. [Click here for more information.](#)

### ***Indirect Lending: Ready to Look***

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Loan officers can now initiate conversations with indirect dealers from the Loan Recap screen. [Click here for more information.](#)

### ***It's Me 247 Bill Pay Product Overview and User Guide***

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You can now block persons and organizations on the bill pay fraud block list from enrolling in bill pay online and in mobile banking (and from being enrolled in CU\*BASE).

[Click here to view details for FISERV.](#)

[Click here to view details for Payveris.](#)

[Click here to view details for iPay.](#)

### ***It's Me 247 Strategies for Controlling Member Access***

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You can now block persons and organizations on the online/mobile fraud block list from enrolling in online and in mobile banking. [Click here for more information.](#)

### ***It's Me 247 P2P User Guide***

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You can now block persons and organizations on the P2P fraud block list from enrolling in P2P online and in mobile banking (and from being enrolled in CU\*BASE). [Click here for more information.](#)

### ***Miscellaneous Member Account Forms***

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You can now configure your loan PAYOFF form used for 365 interest calculation loans to include miscellaneous fees. [Click here for more information.](#)

### ***Splash Page Manager***

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The Splash Manager tool provides customizable messages that members see

when they cannot login to online banking. It can now be used for just a single credit union or a group of credit unions. [Click here for more information.](#)

### ***Wire Transfers in CU\*BASE***

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You can now block members on the incoming and outgoing wire transfer lists from making wire transfers. Additionally use the Pay to Name and country fraud lists when making outgoing wire transfers to bring up suspect matches. [Click here for more information.](#)

### ***Write-Off/Charge-Off Tools***

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When loans are written off or charged off, the specific fraud block list the persons or organizations are added to is the new membership fraud block list. [Click here for more information.](#)

### ***Tracking "Off-Trial Balance" Products with CU\*BASE***

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Credit unions can configure OTB codes and share accounts to prepopulate money to remain in accounts in subsequent scheduled AFT sweep transfers. You can now block persons and organization on the plastics fraud block list from adding card to their OTB accounts. [Click here for more information.](#)

### ***ATM/Debit Processing User Guide***

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Employees now are blocked from adding or reordering ATM or debit cards for members on the plastics orders fraud block list. Screens have been updated to reflect new Tracker access points and card activation options. [Click here for more information.](#)

### ***Reissuing Cards***

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This guide has been updated with information about the new recommended expiration date processing option, Tool #1120 Update Card Expirations. [Click here for more information.](#)

### ***Credit Cards User Guide***

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Employees now are blocked from adding or reordering credit cards, and from opening credit card accounts for members on the plastics orders fraud block list. This booklet contains information about how to service these special types of loans using standard CU\*BASE tools, from creating the loan accounts to posting payments and reviewing transaction history. [Click here for more information.](#)

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## **Additional New Resource**

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### ***Available ACH Transaction Options with CU\*Answers***

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This document highlights the many ways that CU\*Answers products, including CU\*BASE, **It's Me 247** and **It's My Biz 247**, interact through ACH-delivered channels. [Learn more!](#)