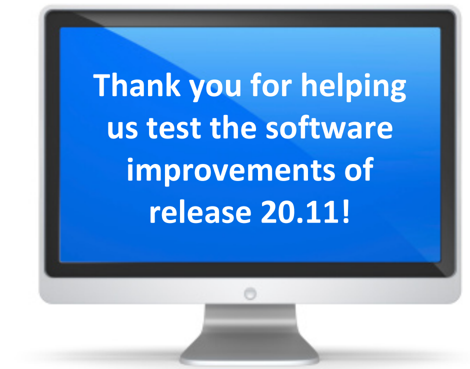
Beta Test Checklist

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



Credit Union Name: **FOCUS**

Primary Contact Name: **Dean Wilson**

Primary Contact Phone Number: **262-437-1280**

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
M E M B E R F A C I N G							
Sample tool	*Sample task*	*Y*	*3*	*2*	*4*	*5*	*This feature will really make processing much easier for tellers.*
Its Me 247 Desktop and Mobile	Once you have a CD type configured for CD secured loans, have staff with that CD type verify that the 'Get Loan" link is present for configured CD types	Y	4	4	3	2	We just don't have a high demand for secured CD loans…but maybe that will change
Its Me 247 Desktop and Mobile	Confirm that the interest rate, fees and repayment options display as configured in your CD type (tool 194)	Y	4	4	4	2	
It's Me 247 Desktop and Mobile	Confirm that the loan agreement is presented to parties and agree with loan terms selected	Y	5	5	5	2	

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 Desktop and Mobile	Confirm that blocked activity is functioning properly for bill pay and P2P.	Y	5	5	5	5	
All Users							
Home Page	Try all of the new icons on both the top and bottom of the home page screen	Y	5	5	5	5	
Preferences	Go to the Preferences button (Star) and update your view of the Home Page by turning on/off the last four options that change the search options, alternate-row shading, display Favorites Tool and follow-up options.	Y	5	5	5	5	
Preferences	Go to the Preferences button (star) and change your default from All Tools to My Favorites. Verify that you now see your favorites when entering your home screen	Y	5	4	4	4	

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

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3	Somewhat
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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
Preferences	Go to the Preferences button (Star) and update your Favorites Groups. Choose the 'Organize Favorites' button which will take you to the new Organize My Favorites window. Here add a new Favorites group by using the drop down and choose (Create New Group). Add tools by clicking a tool in the 'Available Tools' box and then click the 'Add' button. Click on 'Save Group' to go to the next window where you can add the group description. Once done, change your preference to this new 'favorites group' and go back to the Home Page. Notice the new group of tools that show on the Home Page.		Y	4	3	3	3	
Home Page	Use the new drop-down arrow in 'My Favorites Tool' box. If you have more than one favorites group, you can click on 'My Favorite Tools' and see your groups and change the Home Page display.		Y	5	5	5	5	
Home Page	Use the new Filters drop-down arrow		Y	4	4	4	3	I could see this being helpful at a larger credit union where staff have some divisions of labor/department
Preferences	Go to the Preferences button (Star) and change the default size of the Home page to Large and X-Large. Go back to the Home Page and try out the new Home Page screen. Use the new buttons that are displayed. Note the new graphics that rotate when going to and from the Home Page.		Y	5	5	5	5	HOME RUN!! Can't wait until all screens utilize the XL format

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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
Home Page	From the Home Page, with 'All My Tools' shown, click on the 'I' (information) button on a tool that is not one of your current favorites. You will be able to tell which tools are your favorites because the star is white. Once the information window is open, click on the 'Organize Favorites' button and add this tool to your favorites group.	Y	4	4	4	4	
Home Page, Shortcut	Use the new shortcut groups provided in the PowerPoint. WORKACH, WORKBUDG, WORK BUDGA, WORKBUDGP, WORKCHECKS, WORKINV, WORKPL, WORKPLA, WORKSUB	Y	5	5	5	5	Very nice for some of us more senior members who memorized tool #'s and now can find related tools
E F T							
1120	Select a BIN to update card expiration dates. Enter the screen for multiple date ranges to verify the appropriate records come into the screen and sort functions work appropriately.	N					
1120	Enter the card expiration option and look for cards with a status other than 'Active'. Review the card maintenance and ensure that the card is truly a warm status and not hot/closed	N					
1120	It you are using 'Temp-to-Perm', adjust expiration dates accordingly to what is displayed on the vendor's system	N					
1120	To update the expiration dates, enter Save/Done to finalize. Review the report and confirm that the expiration dates have updated appropriately in CU*BASE by using tool 11 or 12	N					

Rate each item on a scale of 1-5.
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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
11 or 12	If possible, order a new card for secondary owner, and input their date of birth. Verify next day on vendor's end that the correct date of birth went over, as well as additional data.	N					
11 or 12	If possible, do the same as above, except for this would be testing a replacement card. Verify next day on vendor's end that correct date of birth went over, as well as additional data.	N					
11 and 12	Use the new tracker options from these tool numbers	N					
892	After you have set up some blocked records in your fraud list, try to order or re-order a card and verify that the block is working appropriately	N					
L E N D I N G							
2	Have staff set up their desired filters for the lending queue and save the setting. Exit and return back in to verify that the screens comes in with the desired filters	Y	4	3	3	3	
2	When working in the loan queue, use the new functionality for refresh and clear filters to verify the functionality. Adjust the saved settings and save again to verify that the new settings are now in place when you come back into the screen	Y	5	3	3	3	

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						
Inquiry, tracker review	Find a member that has been issued a delinquent notice after the beta release date. Verify that co-signer information is now showing in the tracker information Note: This will only be effective for notices issued AFTER the beta release date.	Y	5	5	5	5	
261 normal	Change your configuration for the PAYOFF form under loan details to include the new field for 'Total misc fees for payoff'.	N					
1325 and phone inquiry	After configuring the new misc fees for the payoff form, verify the functionality by creating a payoff document using the new functionality through phone or tool 1325	N					
2	After changing your screen size default in Preferences, go to the "Activity Tracking" and "Counts by UW Code" to view the new size screens. Verify all the functionality available in these screens in standard, large and XL sizes	Y	4	4	3	3	
1110, 470, 2	Configure the new CLR Path model with criteria on the 2nd screen. Add the new CLR Path Model code to a loan product in tool 470. When configured, create a loan application for that product. View the summary screen to see the CLR Path score. When in the summary screen, use the button to view the results and print the reports. Validate the scoring against the member account.	Y	3	3	3	3	So it was a little challenging to figure out some of the nuance of how to create, then go and connect to loan products. The outcome was expected but we are trying to determine how we might leverage these scores versus credit bureaus or models to deliver decisions for members.

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2	After creating a loan application/request with a CLR path model run, create the loan. View the loan creation screen to make sure that the DLR Path model report# is listed on the screen.	Y	5	4	2	2	The flow troubles me, if we are trying to offer a non-credit bureau solution, the CLR Path score appears in the loan application process after you have requested a credit bureau?? It seems like it should be first??
53	Enter an Account # and choose to Run a CLR Path Model by using the Action Code 'CL'. Enter the CLR Path Model code and view the report. Print the report.	Y	5	4	4	3	This seems to address the flow aspect, but if they are a good CLR prospect I assume they have to skip the bureau during In app
53	Enter an account# that a CLR path report has been ran on, use the action code 'CV' to view the CLR Path report. Print the report.	Y	5	5	4	5	
2 and 53	Check any applications that are secured by real estate that have an outstanding lien (other debt for combined LTV). Confirm that you are seeing the CLTV label and the CLTV% on the loan request personal and loan summary application pages	Y	5	4	4	4	
2 and 53	Check any applications secured by multiple collateral records. Confirm that you are seeing the multiple collateral flag on the loan summary screen.	N					We have not had any loan requests come in with multiple collaterals in order to test
194	After working with LenderVP and Imaging, select a CD type to allow loans via online/mobile banking and complete the configuration. Suggestion is to create a new -small balance CD type and only allow staff selected o open CDs in this type initially so that you can become familiar with the process through vetting and hands on through online banking.	Y	5	5	5	5	

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2 and 53	After completing CD loans through online banking, verify that closed loans are displayed in the Booked tab	Y	5	5	4	5	
2 and 53	Check that CD loans that have NOT been completed through online banking appear in the pending tab	Y	5	5	5	5	
Inquiry	Verify that loans booked through online banking appear correctly in CU*BASE – Check balance, loan information, secured records on both the loan and the CD	Y	5	5	5	4	
TELLER/MEMBER SERVICE							
21	Print a misc. member form that is configured to print phone numbers. Verify that the phone numbers and labels available in the new phone database are displaying on the form. (Note: This is a good time to clean up any descriptions from the initial phone conversion where a “?” is included in the description)	Y	5	2	2	2	

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32	Post vault cash transfers and verify that it creates a report of the transfer in your spool file. These reports will replace previous receipts for this option	Y	5	5	1	1	A resounding thud from the teller line staff and supervisors but I understand the bigger picture.
MANAGEMENT							
AUDIT							
892	Confirm that your new member block list retains the existing records after the beta is released	Y	5	2	2	3	There needs to be some better/intuitive information as it took a handful of emails to convey where we would find our existing and how we could change those.

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892	Add members to the "Bill Pay" Block List Add members to the "Lending" Block list Add members to the "New Membership" Block list Add members to the "Online Mobile" Block list Add members to the "Plastic Orders" block list Add members to the "Wire In" Block List Add members to the "Wire Out" Block List (We recommend that you utilize some employees for verification so that the functionality in It's Me 247 can be accessed)		Y	5	4	4	4	Making sure there are details about where CU's existing records will land and how CU's could continue to utilize those existing lists might be extremely helpful. The new tools are neat and would be helpful for a large CU with a fraud department, however for us small fries we might still prefer to aggregate a single style of list.
14	Attempt to enroll blocked members in Bill Pay * Attempt to enroll blocked members to P2P * Attempt to enroll blocked members to Online Mobile. * *this would be applicable only to those members not already enrolled		Y	5	5	4	5	
73	Attempt to Wire Funds in from a member on the "Wire In" Block List Attempt to Wire Funds out from a member on the "Wire out" Block List		Y	5	5	5	5	
892	Add parties to the "Block Pay to" block list		Y	5	5	5	5	
Teller/phone, 667 and 50	Attempt to issue a check or an outgoing wire to one of the entries in the block pay to list. Verify that it blocks or passes appropriately depending on the records on the block list		Y	5	5	5	5	

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3	Confirm New Member Block returns Blocks when expected, that the View List button is functional and where appropriate override and create the membership		Y	5	4	4	4	
BACK OFFICE								
990	Add a customer number to a vendor that has a payment due. Verify that the check displays the customer number displays on the check stub		Y	5	3	3	1	
1900	Change your configuration for what to print on the memo section of the check for Accounts Payable. When checks are printed, verify that the configured data (CU name, invoice number or nothing) is printing on the check correctly		Y	5	3	2	1	
989	Go to the ACH distribution maintenance option and select a record to see the new screen changes. Work with the sort and filter options to verify that screen is working as expected. Use the pending option for any warehoused items to see the details on the transaction		Y	5	4	3	5	
SECURITY ADMINISTRATOR								
1941	Use this new tool to create Credit Union Favorites groups so they are available for your team to use. After you have a group configured, update you preferences to use the CU group and notice the home page displaying this new group		N					
DATABASE ADMINISTRTOR								

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1105	For Payveris clients, work with Where your Members Pay Bills and use the new filter criteria. Swap the columns to see all the optional data for display. Verify the functionality of sorts, individual account number and search criteria to verify it works as expected.	**Y**	**5**	**5**	**5**	**5**	**For a larger CU with an analytics staff this would be a great target for chasing existing members lending relationships elsewhere.**

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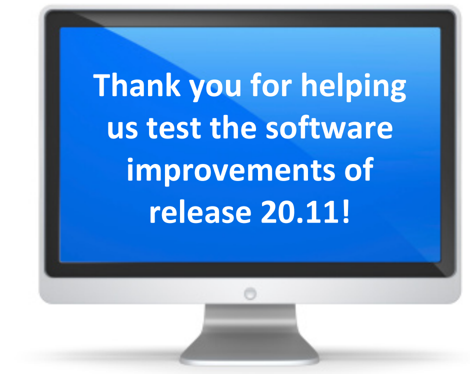
GENERAL COMMENTS

CLR Path has us in a lending quandary as we have already established board policies to allow us to utilize non-credit bureau lending, but we are trying to figure out how organizationally we would approach these offerings. Is it something we only use for an outgoing offer (one-click) or is it something we leverage lending limits to try and limit underwriting costs. Making the default flow…or changing the lenders normal lending process might be a hurdle with our team as it currently sits.

Beta Test Checklist

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



Credit Union Name: **Partnership Financial Credit Union**

Primary Contact Name: **Betty Fallos**

Primary Contact Phone Number: **847-410-9971**

Rate each item on a scale of 1-5.
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Sample tool	*Sample task*	*Y*	*3*	*2*	*4*	*5*	*This feature will really make processing much easier for tellers.*
Its Me 247 Desktop and Mobile	Once you have a CD type configured for CD secured loans, have staff with that CD type verify that the 'Get Loan" link is present for configured CD types	N					
Its Me 247 Desktop and Mobile	Confirm that the interest rate, fees and repayment options display as configured in your CD type (tool 194)	N					
It's Me 247 Desktop and Mobile	Confirm that the loan agreement is presented to parties and agree with loan terms selected	N					

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It's Me 247 Desktop and Mobile	Confirm that blocked activity is functioning properly for bill pay and P2P.		Y	5	5	4	5	
All Users								
Home Page	Try all of the new icons on both the top and bottom of the home page screen		Y	5	4	4	4	This will vary by employee. Those that use all the icons loved it, some do not sure them often.
Preferences	Go to the Preferences button (Star) and update your view of the Home Page by turning on/off the last four options that change the search options, alternate-row shading, display Favorites Tool and follow-up options.		Y	5	5	4	4	Would prefer the accounts screens and all other screens have same size not just the home page and the lending que
Preferences	Go to the Preferences button (star) and change your default from All Tools to My Favorites. Verify that you now see your favorites when entering your home screen		Y	5	5	4	4	

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Preferences	Go to the Preferences button (Star) and update your Favorites Groups. Choose the 'Organize Favorites' button which will take you to the new Organize My Favorites window. Here add a new Favorites group by using the drop down and choose (Create New Group). Add tools by clicking a tool in the 'Available Tools' box and then click the 'Add' button. Click on 'Save Group' to go to the next window where you can add the group description. Once done, change your preference to this new 'favorites group' and go back to the Home Page. Notice the new group of tools that show on the Home Page.	Y	5	5	4	4	There are so many tools, not sure if staff will take the time to set up without knowing all the tools and what they do. However they may start to building their preferences.
Home Page	Use the new drop-down arrow in 'My Favorites Tool' box. If you have more than one favorites group, you can click on 'My Favorite Tools' and see your groups and change the Home Page display.	Y	5	5	4	4	
Home Page	Use the new Filters drop-down arrow	Y	5	5	4	4	Filter will only filter for tools wi/in the tool group chosen staff will need to remember to choose the correct tool group.
Preferences	Go to the Preferences button (Star) and change the default size of the Home page to Large and X-Large. Go back to the Home Page and try out the new Home Page screen. Use the new buttons that are displayed. Note the new graphics that rotate when going to and from the Home Page.	Y	5	5	4	4	Staff really appreciated the large and X large screen options. Some staff said the changing screen size is distracting. However we did not see rotating graphics?

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
Home Page	From the Home Page, with 'All My Tools' shown, click on the 'I' (information) button on a tool that is not one of your current favorites. You will be able to tell which tools are your favorites because the star is white. Once the information window is open, click on the 'Organize Favorites' button and add this tool to your favorites group.	Y	5	5	4	4	The ability to add tools to my favorites with minimal keystrokes is great
Home Page, Shortcut	Use the new shortcut groups provided in the PowerPoint. WORKACH, WORKBUDG, WORK BUDGA, WORKBUDGP, WORKCHECKS, WORKINV, WORKPL, WORKPLA, WORKSUB	Y	5	3	3	3	Those that tend to work with those tools daily liked it but have their process down. However, it will be a great feature when we onboard a new employee.
E F T							
1120	Select a BIN to update card expiration dates. Enter the screen for multiple date ranges to verify the appropriate records come into the screen and sort functions work appropriately.	Y	5	4	4	4	
1120	Enter the card expiration option and look for cards with a status other than 'Active'. Review the card maintenance and ensure that the card is truly a warm status and not hot/closed	Y	5	4	4	3	
1120	It you are using 'Temp-to-Perm', adjust expiration dates accordingly to what is displayed on the vendor's system	Y	5	4	4	4	
1120	To update the expiration dates, enter Save/Done to finalize. Review the report and confirm that the expiration dates have updated appropriately in CU*BASE by using tool 11 or 12	Y	5	5	5	5	

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11 or 12	If possible, order a new card for secondary owner, and input their date of birth. Verify next day on vendor's end that the correct date of birth went over, as well as additional data.	Y	5	5	5	5	Back office team likes the enhancements in the debit card platform and the adding of the secondary's DOB
11 or 12	If possible, do the same as above, except for this would be testing a replacement card. Verify next day on vendor's end that correct date of birth went over, as well as additional data.	Y	5	5	5	5	
11 and 12	Use the new tracker options from these tool numbers	Y	5	4	4	4	
892	After you have set up some blocked records in your fraud list, try to order or re-order a card and verify that the block is working appropriately	Y	5	5	5	5	
L E N D I N G							
2	Have staff set up their desired filters for the lending queue and save the setting. Exit and return back in to verify that the screens comes in with the desired filters	Y	5	5	5	5	Like the fact that this process eliminates keystroke and allows the user to have their information at a glance this will be helpful for each loan officer.
2	When working in the loan queue, use the new functionality for refresh and clear filters to verify the functionality. Adjust the saved settings and save again to verify that the new settings are now in place when you come back into the screen	Y	5	5	5	5	Some staff said that when reviewing loan que they like to use filters they choose but it did work.

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Inquiry, tracker review	Find a member that has been issued a delinquent notice after the beta release date. Verify that co-signer information is now showing in the tracker information Note: This will only be effective for notices issued AFTER the beta release date.	N					
261 normal	Change your configuration for the PAYOFF form under loan details to include the new field for 'Total misc fees for payoff'.	Y	5	5	5	5	EVP was not able to locate the field mentioned. However I could see it.
1325 and phone inquiry	After configuring the new misc fees for the payoff form, verify the functionality by creating a payoff document using the new functionality through phone or tool 1325	Y	5	5	4	4	DOESN'T BREAK OUT THE FEE ON THE STATEMENT BUT THE AMOUNT MATCH
2	After changing your screen size default in Preferences, go to the "Activity Tracking" and "Counts by UW Code" to view the new size screens. Verify all the functionality available in these screens in standard, large and XL sizes	Y	5	5	4	4	I PREFER THE STANDARD SIZE
1110, 470, 2	Configure the new CLR Path model with criteria on the 2nd screen. Add the new CLR Path Model code to a loan product in tool 470. When configured, create a loan application for that product. View the summary screen to see the CLR Path score. When in the summary screen, use the button to view the results and print the reports. Validate the scoring against the member account.	Y	4	4	4	4	EvP thought once a true formula is determined this will be helpful. If we were able to mine the data used it will be even more helpful.

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

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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
2	After creating a loan application/request with a CLR path model run, create the loan. View the loan creation screen to make sure that the DLR Path model report# is listed on the screen.	Y					Evp was not sure where to find this.
53	Enter an Account # and choose to Run a CLR Path Model by using the Action Code 'CL'. Enter the CLR Path Model code and view the report. Print the report.	Y	4	4	3	4	Nice to audit with – reports would be nice.
53	Enter an account# that a CLR path report has been ran on, use the action code 'CV' to view the CLR Path report. Print the report.	Y	4	4	4	4	Nice feature
2 and 53	Check any applications that are secured by real estate that have an outstanding lien (other debt for combined LTV). Confirm that you are seeing the CLTV label and the CLTV% on the loan request personal and loan summary application pages	Y	4	5	4	5	This is very helpful for tracking and audit purposes.
2 and 53	Check any applications secured by multiple collateral records. Confirm that you are seeing the multiple collateral flag on the loan summary screen.	N					No records with multiple collateral listed
194	After working with LenderVP and Imaging, select a CD type to allow loans via online/mobile banking and complete the configuration. Suggestion is to create a new -small balance CD type and only allow staff selected o open CDs in this type initially so that you can become familiar with the process through vetting and hands on through online banking.	N					

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
2 and 53	After completing CD loans through online banking, verify that closed loans are displayed in the Booked tab	N					Not set up at this time.
2 and 53	Check that CD loans that have NOT been completed through online banking appear in the pending tab	N					
Inquiry	Verify that loans booked through online banking appear correctly in CU*BASE – Check balance, loan information, secured records on both the loan and the CD	N					
T E L L E R / M E M B E R S E R V I C E							
21	Print a misc. member form that is configured to print phone numbers. Verify that the phone numbers and labels available in the new phone database are displaying on the form. (Note: This is a good time to clean up any descriptions from the initial phone conversion where a “?” is included in the description)	Y	5	5	5	5	

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
32	Post vault cash transfers and verify that it creates a report of the transfer in your spool file. These reports will replace previous receipts for this option	Y	5	2	2	2	My team would rather have the original receipt version that we can save to prodoc and not actually print. Not fans of having the "report" print automatically.
							Team members really felt this was a waste of paper. We are a CU working towards being paperless and this adds paper.
M A N A G E M E N T							
A U D I T							
892	Confirm that your new member block list retains the existing records after the beta is released	Y	5	5	5	5	Works awesome

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
892	Add members to the "Bill Pay" Block List Add members to the "Lending" Block list Add members to the "New Membership" Block list Add members to the "Online Mobile" Block list Add members to the "Plastic Orders" block list Add members to the "Wire In" Block List Add members to the "Wire Out" Block List (We recommend that you utilize some employees for verification so that the functionality in It's Me 247 can be accessed)	Y	5	5	5	5	Love all the new blocked features
14	Attempt to enroll blocked members in Bill Pay * Attempt to enroll blocked members to P2P * Attempt to enroll blocked members to Online Mobile. * *this would be applicable only to those members not already enrolled	Y	5	5	5	5	
73	Attempt to Wire Funds in from a member on the "Wire In" Block List Attempt to Wire Funds out from a member on the "Wire out" Block List	Y	5	5	5	5	
892	Add parties to the "Block Pay to" block list	Y	4	5	5	5	
Teller/phone, 667 and 50	Attempt to issue a check or an outgoing wire to one of the entries in the block pay to list. Verify that it blocks or passes appropriately depending on the records on the block list	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
3	Confirm New Member Block returns Blocks when expected, that the View List button is functional and where appropriate override and create the membership		Y	5	5	5	5	
BACK OFFICE								
990	Add a customer number to a vendor that has a payment due. Verify that the check displays the customer number displays on the check stub		Y	5	5	5	5	
1900	Change your configuration for what to print on the memo section of the check for Accounts Payable. When checks are printed, verify that the configured data (CU name, invoice number or nothing) is printing on the check correctly		Y	5	5	5	5	
989	Go to the ACH distribution maintenance option and select a record to see the new screen changes. Work with the sort and filter options to verify that screen is working as expected. Use the pending option for any warehoused items to see the details on the transaction		Y/N					The columns sort finds and the filter worked, however we did not see a pending option for any warehoused items.
SECURITY ADMINISTRATOR								
1941	Use this new tool to create Credit Union Favorites groups so they are available for your team to use. After you have a group configured, update you preferences to use the CU group and notice the home page displaying this new group							
DATABASE ADMINISTRTOR								

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

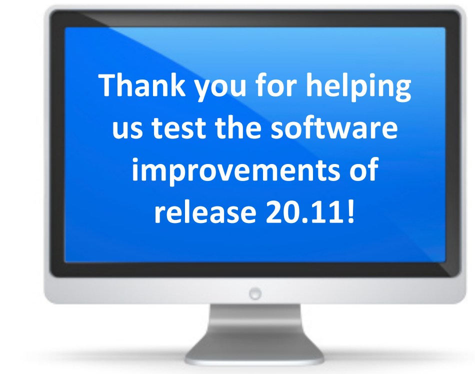
5	Extremely
4	Very
3	Somewhat
2	Slightly
1	Not at all
N/A	Not applicable

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
1105	For Payveris clients, work with Where your Members Pay Bills and use the new filter criteria. Swap the columns to see all the optional data for display. Verify the functionality of sorts, individual account number and search criteria to verify it works as expected.	**N**					**We are IPay client**

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**

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

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 and Mobile	Once you have a CD type configured for CD secured loans, have staff with that CD type verify that the 'Get Loan" link is present for configured CD types	Y	5	5	5	5	Personally forgot how to activate products online but once I recalled where that was, the process is actually extremely simple.
Its Me 247 Desktop and Mobile	Confirm that the interest rate, fees and repayment options display as configured in your CD type (tool 194)	Y	5	5	5	5	Confirmed with CUA Forms team live.
It's Me 247 Desktop and Mobile	Confirm that the loan agreement is presented to parties and agree with loan terms selected	Y	5	5	5	5	Confirmed with CUA Forms team live.

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
It's Me 247 Desktop and Mobile	Confirm that blocked activity is functioning properly for bill pay and P2P.	Y	5	5	5	5	Easy to use and displays a clear clocked message
All Users							
Home Page	Try all of the new icons on both the top and bottom of the home page screen	Y	4	3	4	4	Icons work as expected. Answer book and learn about this feature take longer to load than before
Preferences	Go to the Preferences button (Star) and update your view of the Home Page by turning on/off the last four options that change the search options, alternate-row shading, display Favorites Tool and follow-up options.	Y	5	5	5	5	Good to have customization. Half/half for staff who will use it.
Preferences	Go to the Preferences button (star) and change your default from All Tools to My Favorites. Verify that you now see your favorites when entering your home screen	Y	3	3	3	5	I do, it works. I admit I liked the previous way better (1 vs 2 clicks); however, I'm sure we will grow accustomed to it.

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
Preferences	Go to the Preferences button (Star) and update your Favorites Groups. Choose the 'Organize Favorites' button which will take you to the new Organize My Favorites window. Here add a new Favorites group by using the drop down and choose (Create New Group). Add tools by clicking a tool in the 'Available Tools' box and then click the 'Add' button. Click on 'Save Group' to go to the next window where you can add the group description. Once done, change your preference to this new 'favorites group' and go back to the Home Page. Notice the new group of tools that show on the Home Page.		Y	5	5	5	5	Very easy to work with. Will certainly take time to build groups but the impact once they're built could be great. Primarily, organization-wide groups.
Home Page	Use the new drop-down arrow in 'My Favorites Tool' box. If you have more than one favorites group, you can click on 'My Favorite Tools' and see your groups and change the Home Page display.		Y	5	5	5	5	Nice.
Home Page	Use the new Filters drop-down arrow		Y	5	5	5	5	Very nice tool. I'll be interested to see how often it is used as we get accustomed to it. Staff seemed to like this option.
Preferences	Go to the Preferences button (Star) and change the default size of the Home page to Large and X-Large. Go back to the Home Page and try out the new Home Page screen. Use the new buttons that are displayed. Note the new graphics that rotate when going to and from the Home Page.		Y	5	5	5	5	Absolutely love the full screen option. Way overdue. I do wish it carried through to other tools, but understand there are probably programming challenges with that haha.

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
Home Page	From the Home Page, with 'All My Tools' shown, click on the 'I' (information) button on a tool that is not one of your current favorites. You will be able to tell which tools are your favorites because the star is white. Once the information window is open, click on the 'Organize Favorites' button and add this tool to your favorites group.	Y	5	5	5	5	Good
Home Page, Shortcut	Use the new shortcut groups provided in the PowerPoint. WORKACH, WORKBUDG, WORK BUDGA, WORKBUDGP, WORKCHECKS, WORKINV, WORKPL, WORKPLA, WORKSUB	Y	5	5	2	2	I don't know if it's applicable as setup, but if there are additional shortcut groups added in the future, I could see it being beneficial. I believe the back office would use the ach group.
E F T							
1120	Select a BIN to update card expiration dates. Enter the screen for multiple date ranges to verify the appropriate records come into the screen and sort functions work appropriately.	Y	5	5	5	5	Like being able to sort by "last Used" date. We could exclude cards that probably don't exist and pose member risk.
1120	Enter the card expiration option and look for cards with a status other than 'Active'. Review the card maintenance and ensure that the card is truly a warm status and not hot/closed	Y	5	5	5	1	Only had 1 such card
1120	It you are using 'Temp-to-Perm', adjust expiration dates accordingly to what is displayed on the vendor's system	N					Not Using
1120	To update the expiration dates, enter Save/Done to finalize. Review the report and confirm that the expiration dates have updated appropriately in CU*BASE by using tool 11 or 12	N					No cards showing as coming due for renewal in Nov/Dec

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
11 or 12	If possible, order a new card for secondary owner, and input their date of birth. Verify next day on vendor's end that the correct date of birth went over, as well as additional data.	Y	5	5	5	5	Makes ordering much easier
11 or 12	If possible, do the same as above, except for this would be testing a replacement card. Verify next day on vendor's end that correct date of birth went over, as well as additional data.	Y	5	5	5	5	Makes ordering much easier
11 and 12	Use the new tracker options from these tool numbers	Y	5	5	5	5	Works
892	After you have set up some blocked records in your fraud list, try to order or re-order a card and verify that the block is working appropriately	Y	5	5	5	5	Works
L E N D I N G							
2	Have staff set up their desired filters for the lending queue and save the setting. Exit and return back in to verify that the screens comes in with the desired filters	Y	5	5	5	5	NDG
2	When working in the loan queue, use the new functionality for refresh and clear filters to verify the functionality. Adjust the saved settings and save again to verify that the new settings are now in place when you come back into the screen	Y	5	5	5	5	NDG

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
Inquiry, tracker review	Find a member that has been issued a delinquent notice after the beta release date. Verify that co-signer information is now showing in the tracker information Note: This will only be effective for notices issued AFTER the beta release date.	Y	5	5	5	1	3rd party send our reminders
261 normal	Change your configuration for the PAYOFF form under loan details to include the new field for 'Total misc fees for payoff'.	Y	3	5	5	5	Didn't catch the down-arrows so I struggled to find it, and I have never manipulated a form before so it took a little trial and error to pop it into the right place. I assume most CU's have somebody more in tune with forms and it won't be an issue.
1325 and phone inquiry	After configuring the new misc fees for the payoff form, verify the functionality by creating a payoff document using the new functionality through phone or tool 1325	Y	5	5	5	5	All works good.
2	After changing your screen size default in Preferences, go to the "Activity Tracking" and "Counts by UW Code" to view the new size screens. Verify all the functionality available in these screens in standard, large and XL sizes	Y	5	5	5	5	NDG
1110, 470, 2	Configure the new CLR Path model with criteria on the 2nd screen. Add the new CLR Path Model code to a loan product in tool 470. When configured, create a loan application for that product. View the summary screen to see the CLR Path score. When in the summary screen, use the button to view the results and print the reports. Validate the scoring against the member account.	Y	3	4	4	5	NDG – Cool tool, curious to see how this is going to work in the future. We are not setup to use it yet, but I see a lot of value in it.

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	After creating a loan application/request with a CLR path model run, create the loan. View the loan creation screen to make sure that the DLR Path model report# is listed on the screen.	Y	5	5	5	5	NDG – Issue reported about it not flowing through if you hit "enter" through the app steps, otherwise works good.
53	Enter an Account # and choose to Run a CLR Path Model by using the Action Code 'CL'. Enter the CLR Path Model code and view the report. Print the report.	Y	5	5	5	5	NDG
53	Enter an account# that a CLR path report has been ran on, use the action code 'CV' to view the CLR Path report. Print the report.	Y	5	5	5	5	NDG
2 and 53	Check any applications that are secured by real estate that have an outstanding lien (other debt for combined LTV). Confirm that you are seeing the CLTV label and the CLTV% on the loan request personal and loan summary application pages	N					LTM We don't do our RE loan applications on CUA so this will not apply
2 and 53	Check any applications secured by multiple collateral records. Confirm that you are seeing the multiple collateral flag on the loan summary screen.	N					LTM We don't do our RE loan applications on CUA to this will not apply
194	After working with LenderVP and Imaging, select a CD type to allow loans via online/mobile banking and complete the configuration. Suggestion is to create a new -small balance CD type and only allow staff selected o open CDs in this type initially so that you can become familiar with the process through vetting and hands on through online banking.	Y	5	5	5	5	Love the fact there is a little button that pops up on online banking to call attention to it.

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 and 53	After completing CD loans through online banking, verify that closed loans are displayed in the Booked tab	Y	5	5	5	5	They are.
2 and 53	Check that CD loans that have NOT been completed through online banking appear in the pending tab	Y	5	5	5	5	NDG
Inquiry	Verify that loans booked through online banking appear correctly in CU*BASE – Check balance, loan information, secured records on both the loan and the CD	Y	5	5	5	5	They are.
T E L L E R / M E M B E R S E R V I C E							
21	Print a misc. member form that is configured to print phone numbers. Verify that the phone numbers and labels available in the new phone database are displaying on the form. (Note: This is a good time to clean up any descriptions from the initial phone conversion where a "?" is included in the description)	N					Does not apply to our forms

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
32	Post vault cash transfers and verify that it creates a report of the transfer in your spool file. These reports will replace previous receipts for this option	Y	4	4	4	3	
M A N A G E M E N T							
A U D I T							
892	Confirm that your new member block list retains the existing records after the beta is released	Y	5	5	5	5	The list did not transfer at first but after contacting CU* in regards to this the list was transferred and the error corrected.

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
892	Add members to the “Bill Pay” Block List Add members to the “Lending” Block list Add members to the “New Membership” Block list Add members to the “Online Mobile” Block list Add members to the “Plastic Orders” block list Add members to the “Wire In” Block List Add members to the “Wire Out” Block List (We recommend that you utilize some employees for verification so that the functionality in It’s Me 247 can be accessed)	Y	5	5	5	5	Excellent.. very easy
14	Attempt to enroll blocked members in Bill Pay * Attempt to enroll blocked members to P2P * Attempt to enroll blocked members to Online Mobile. * *this would be applicable only to those members not already enrolled	Y	5	5	5	5	Great! Gives clear message of being blocked
73	Attempt to Wire Funds in from a member on the “Wire In” Block List Attempt to Wire Funds out from a member on the “Wire out” Block List	Y	5	5	5	5	Worked great..very easy and beneficial
892	Add parties to the “Block Pay to” block list	Y	5	5	5	5	Quick and Easy
Teller/phone, 667 and 50	Attempt to issue a check or an outgoing wire to one of the entries in the block pay to list. Verify that it blocks or passes appropriately depending on the records on the block list	Y	5	5	5	5	Very beneficial

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
3	Confirm New Member Block returns Blocks when expected, that the View List button is functional and where appropriate override and create the membership	Y	5	5	5	5	Works great
BACK OFFICE							
990	Add a customer number to a vendor that has a payment due. Verify that the check displays the customer number displays on the check stub	Y	5	5	5	5	Works
1900	Change your configuration for what to print on the memo section of the check for Accounts Payable. When checks are printed, verify that the configured data (CU name, invoice number or nothing) is printing on the check correctly	Y	5	5	5	5	Will most likely just use CU name. would like to use invoice number, but often times we pay multiple invoices with one check.
989	Go to the ACH distribution maintenance option and select a record to see the new screen changes. Work with the sort and filter options to verify that screen is working as expected. Use the pending option for any warehoused items to see the details on the transaction	Y	5	3	4	5	Works well, would be nice if last name search filter would hit on partial matches. Ie search for Ex, would pull up Example.
SECURITY ADMINISTRATOR							
1941	Use this new tool to create Credit Union Favorites groups so they are available for your team to use. After you have a group configured, update you preferences to use the CU group and notice the home page displaying this new group	Y	5	5	5	5	Will look at to standardize tools for training/simplicity purposes.
DATABASE ADMINISTRTOR							

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
1105	For Payveris clients, work with Where your Members Pay Bills and use the new filter criteria. Swap the columns to see all the optional data for display. Verify the functionality of sorts, individual account number and search criteria to verify it works as expected.	**N**					**We are not Payveris clients**

GENERAL COMMENTS