

Conversion Updates



The updated Teller, Member Service, Loan, and Product Manuals are available on the intranet.

Live Day Statistics

The Phone Center fielded over 1,500 calls.

The MSO's waited on over 70 members.

The tellers completed over 5,000 transactions.

Conversion Party

Reminder - the Conversion Celebration is this Friday, June 4 from 6:00 – 9:00pm, with pizza being served at 6:30. Due to some arrangements with the Fieldhouse, we do need to have a headcount for the event. Please respond to Susan Gleason's meeting request sent to all staff, or send her an e-mail indicating whether or not you are planning to attend – hope to see everyone there!

- The loan balances shown in It's Me 247 are payoff balances.
- When a loan is ready to be reviewed by an approver, change the underwriting code to "PD". After an approver looks at the loan, they will change the code to reflect their decision.
- Put all recommendations in the Loan App comments. When the loan is closed, it is necessary to save a Short Form Application with the comments included. This is the only place that the comments will be saved.
- CU*Answers will initially be printing, stuffing, and mailing all of our notices.
- Clearing Home Equity checks:
 - Do a cash withdrawal from the Home Equity Line of Credit.
 - In Phone Operator, click F9 to update the comments.
 - Choose #4 to change a previous message left in the transaction history.
 - Type in the account number and loan suffix and choose the withdrawal.
 - Replace the comments in the description field with "Cleared Check, Check #XXXX
- Scan the check with your withdrawal tickets.
- When printing guaranteed checks, fill out a withdrawal ticket and have the member sign it. Keeps the stubs in a pile next to the printer and send them to Hilary at the end of the day.
- All voided guaranteed check copies must be faxed to accounting after reversing the initial transaction. The original should still be sent in the courier.
- Do not order checks on until further notice. Harland is working on a small change. Any orders received should be held until Dacia says otherwise.
- When giving a member their information to set up direct deposits, use the MICR from their checks for checking accounts only. All other shares must be a total of 12 digits with the account number followed by the suffix. Start the code with zeros to fill the 12 digits. A new direct deposit form has been added to HI in chapter 3 of the MSO manual.
- When setting up a Paper Payroll distribution, please make sure that you are only making changes to the distribution screen. If you make changes to the deduction screen it will cause problems when their next payroll comes in.
- Auto Security is available for all staff to use and will decrease the number of times the system requires your two-digit ID and password. If you would like to utilize this feature, follow these steps:
 - Click the Star icon at the top of the screen.
 - On the General tab, click "Prompt to Activate Auto-Security".
 - Sign out of CU*Base and back in. They system will now prompt for your two-digit ID every time you log in.
- We will not charge a Christmas or Vacation Club early withdrawal penalty until further notice.
- After scanning an ID, you must add the ID to CU*Base:
 - Go to the main menu of CU*Base and click #26.
 - Type in the account number and click enter through the address screens until you reach the "Other Information" screen.
 - Click the "Photo ID on File" button in the top right-hand corner.