

11/14

CU*BASE® Monthly Monitor Recap

November 2014

Your credit union is part of the CU*Answers collaborative network, your network. The CU*BASE Monthly Monitor Recap is designed to keep you informed in an ongoing basis of feature improvements, vendor enhancements, and other miscellaneous changes to CU*BASE and our other core software products.

This specific Monthly Monitor Recap covers programming changes implemented during the month of November.

To learn more about all projects in the pipeline, refer to the Monitor website at <http://monitor.cuanswers.com/>

Enhancements

- Updated the AIRE file to report delinquency information based on actual # of days delinquent.
- Automated Skip Pay for Consumer Loans
- Updated employee ID on closed membership and account dashboards to employee ID that closed the account
- Associated Apps for Wisconsin – allows for spouses of applicants to be included on the loan application.
- Message center rewrite/enhancement
- Budget Rewrite
- Coop Card Status Phase 2 Implementation
- Created a view only version for the online credit card maintenance tool
- Added an option to run insurance expiration analysis without written off loans in MNRPTE, #11
- GSET Form Changes
- Created an SSO to Digital Mailer's "My Virtual Strong Box" website from It's Me 247.
- Added Insider/Employee Type as a filter on the Targeted Tiered Score Analysis dashboard
- Where Members Shop Enhancement – Added the ACH withdrawal transactions
- Added a date field for Date of FFE for settlement statements
- Enhancements to modified APR for misc. coverages
- Added importing capabilities to add a list of prospective member names from an external source into the pending memberships apps database
- Added an edit against changing or configuring a LOC loan to use 360 interest calc
- Updates to Member Reach Query Definitions
- Updated the Credit Card statement history to allow for display of negative values
- Added Vantiv Single Sign on for credit cards to OTB configuration screen
- Added an edit to not allow a blank in the last transaction date in the loan adjustment screens to eliminate the date timestamp error
- Developed a new GOLD Icon for the Custom Training Edition
- Added the up and down arrows to the Print GL Trial Balance by month screen
- Annual Account Service Charge fees – created a last run date upon activation of a service charge
- Update to enable back arrow keys for F7 and eliminate the END function key in MNGELE, #2
- 2014 IRS 1220 Publication changes for tax reporting
- Changed workfile name for GL trial balance to a unique name so that multiple users can run the same option simultaneously

Internal Enhancement

- Added ability to create monthly billing requests for single CU and to use current month files if a client has de-converted
- Instant Card Issue Tool consolidation and enhancement
- Updated the GOLD online help URL to use new website
- Updated the PANCARD limit flood tool to allow options for BIN length
- Updated vendor PBF send code to be able to handle SITE4 send of PBF for GO Anywhere similar to batch maintenance send recon receive
- Updated the entry field in OPER to allow for numbers to be typed into the Save File Name field

Miscellaneous

- Updated Lifetime Point Statements to not include members with wrong addresses or no mails.
- Updated Shared Branching FSCC & CUSC Acquirer to correctly format names in the Teller Line Posting screen
- Updated the Closed Member Account Report in MNRPTB to pull the Employee ID rather than the Name ID
- Corrected the update function of Stock value to update records appropriately
- Changed the loan description in MNUPDT, #2, to be defined as 15 long, therefore eliminating the extra character (1) at the end of the description.
- Fixed invalid interest calculation in Its Me 247 for A2A transfers on 360 loans.
- Updated CUSC/FSCC issuer to eliminate transactions on HSA accounts similar to IRA as codes cannot be posted in shared branching.
- Updated logic when creating the TAX file to assure that IRA and HSA accounts are written as non-reportable regardless of the IRS flag in the DIVAPL or CDTYPE configuration.
- Updated the down arrow key in phone operator to move to the next page of transactions appropriately when an ACH record is highlighted
- Added back edit for reusing suffixes that were closed in the calendar year when creating a new loan
- Updated the medallion maintenance screen to provide a look up button next to the medallion type
- updated list to allow for usage of the up and down arrows on the loan account maintenance screen
- Updated the chart of accounts maintenance screen to display the Corp ID after proceeding from the previous panel where the Corp ID is entered.
- Eliminated error message when running the loan risk score analysis report in MNMGMT #20
- Updated the CD update screen to send the correct values for the all principle distribution checkbox
- Updated the print investment trial balance report in MNINVS to prompt for the correct report when deleting
- Updated subfile in GOLD for savings bonds to correctly show all entries at the bottom of the subfile in MNUPDT #22
- Corrected the placing of the decimal in the 247 Lender Model Analysis
- Changed size of the occupation field on the CTR form to be consistent
- Tightened the edit on CTR screens so the CTR's don't get rejected by FinCEN
- Updated the MASTER file to allow for the update of the cass certification flag when no address change is made
- Updated MNUPDT, option 13 to properly show data on the GOLD screen
- When creating a new general ledger account in MNGELE #2, the end of year reversal account is now saving properly
- Member loan maintenance is now displaying the purpose code correctly on the screen

- eNotice navigational links for transfers and loan payments are now displaying correctly when freeze code is 1
- File name/file now generates appropriately to the QUERYXX library for abnormal activity export
- When utilizing the sortable lending queue columns, app comments can now be viewed appropriately
- Updated # days delinquent in AIRES file to report 0 days if not delinquent and use last day of month for EOM file used when calculating #days
- Updated the draft posting exception report to appropriately display the “possible duplicate check” message when appropriate
- Updated the file maintenance field names to write out as upper case for draft exception maintenance
- Eliminated display program message when entering in a current date or future date in MNMGMT #23
- Updated Work New/Closed memberships to bring in the account number properly for closed account inquiry
- The closed date and employee ID closing account now update appropriately to MEMBER3 when redeeming a certificate
- Removed or changed the date default in ACH receive and posting programs to allow repetitive processing
- Updated the Fiserv RCM file batch total record count field to 9,0.
- Eliminated logging errors in It's Me 247 by closing the cursor on the SQL statement