October 2021 Monthly Recap

The Owner's View Monthly Recap is designed to keep you informed on an ongoing basis of feature improvements, vendor enhancements, and other miscellaneous changes to CU*BASE and our other core software products. This specific Owner's View Monthly Recap covers programming changes implemented during the month of October.

EFT Modifications

- 55393   Update batch maintenance to send the MASTER address when an alternate address is deleted.
- 56349   When encrypting and archiving files to the IFS the authority on the files changed to be a user's group profile instead of being owned by the user that ran the program.
- 57017   Modify send program for CO-OP AP Batch 4 debit maintenance to include a check for the correct CUXREF record and rename the send file.
- 56698   Mandate: JHA is requiring minimum daily spend limits on AFT's for Cash Apps. Removed these transactions from our daily limit checking.
- 56708   Updated ISO control configurations to properly remove FILExx library from current library list when exiting the maintenance program.

Enhancements

- 49221   New infrastructure for Integration of Hyosung Nautiluz Hybrid ATM in preparation for initial beta site.
- 51375   Enhancement to store Disbursement Instructions Prior to Loan Creation (Includes Revamp of Loan Disbursement Screen).
- 52070   Created a tool for credit unions to maintain merchant code groups from list of existing merchant category codes.
- 52678   Added ability to Create Escrow Analysis Disclosure for Loans with Payment Frequencies other than Monthly.
- 52872   Created member dividends dashboard for qualified dividends.
- 53066   Expanded Parcel/Tax ID Field Length on Collateral and Escrow Records.
- 53108   New Database to Store Data Required for HMDA (Home Mortgage Disclosure Act).

- 53376   Updated NSF/OD Protection Configuration to Allow Non-Return Fees by Origin Code and set a minimum transaction amount for fee.
- 53492   Expanded Member Elected Skip Pay Programs to include Credit Cards.
- 53497   Added new process and selection option for 1st rate change within mini contract variable rate code.
- 53551   Created an Engine for Predictive Retailing (aka "Nostradamus").
- 53845   New Integration with Lenders Protection.
- 54068   New Integration with CUMONEY pre-paid debit card solution.
- 54127   Escrow Analysis Statement Format Enhancements.
- 54199   Expanded the automated online loan booking process used for CD Secured loans to support unsecured loans.
- 54315   Expanded Adjustment Period for Contract Variable Rate Loans to 999 months.
- 54485   Employee Security Enhancement: Expanded Teller Vault Assignments (from 20 max authorized vaults to unlimited).
- 54532   Indirect Loan Dashboard Enhancements.
- 54533   Adjusted ANR Scoring to include Payroll with ACH Activity.
- 54553   Added a field to the record rental payment at the time of credit request for FUEL.
- 55008   Dashboard: Phase 2 Additions to 1750 Online Banking Activity Analysis.
- 55099   Enhanced On-Demand ACH Fee Options to Allow Different Fees for CU*BASE vs. online banking.
- 55352   G/L Lookup Window Enhancements to Identify Suspended G/L Accounts.
- 55434   Built API endpoint that will show whether a member is in proper standing to allow bypass of restrictive endorsement.
- 55474   Created a tool to broadcast a system-wide alert to all workstations via the CU*BASE Home Page.
- 55812   Created process for card randomization in CU*BASE.
- 55922   Mortgage Statement Update to Break Out Principal and Interest in the Explanation of Amount Due Section.
- 56042   Enhancements to Employee Audit Reports Tool #402.
- 56290   Added photo ID edit and refresh buttons to the Xpress Teller Verify ID screen.
- 56557   Created a stored procedure and API endpoint on the Online Banking API to return member session tokens from trusted sources.
- 52358   Update Credit Receive programs to record errors sent from Zoot.
- 53928   Create and implement process to purge Credit Card Rate Master

records where there is no corresponding active loan.

- 54846 New 90 day purge by time zone to reduce the number of records in the application audit table "MBRAPPSTAT".
- 56819 Integration with vendor Haberfield.
- 54516 Enhancements to the credit cards individual statement layout.
- 55128 New Business Credit Card Summary Statement.

GOLD Modifications

- 54629 Added a search capability to the Tracker Review inquiry screen.
- 57251 GOLD change to eliminate a Script Stack Overflow error.
- 57203 Updated confirmation window for moving DIVAPL to show the full GL number.
- 57136 Added GOLD export icon to credit report data mining dashboard.
- 57088 GOLD Screen change for phone, inquiry, transfer screens to highlight invalid email and display notation for deceased members.
- 57024 Corrected VAT Chart Rendering Timing Error in Member Retention by Age Dashboard.
- 56892 Preferred Contact Method "PH" now showing in GOLD.
- 56890 Change to Xpress Teller images to have more clarity.
- 56884 Changed the hover help for the ATM/Debit Card Maint option on the Close Membership process to show the appropriate function key.
- 56865 In Tool #158, Supplemental Vault Configuration, it now defaults to the edit screen when double clicking.
- 56808 Change to GOLD screen to correct the spelling of "Notification" on the eAlert Subscription Maintenance Screen.
- 56796 Change to GOLD screen to remove the word "Monthly" from the ANR Scoring Evaluation Screen.
- 56683 Adjusted the subfile list to include the last record on Abnormal Activity configurations.
- 56632 In the configuration for the Abnormal Activity Pattern type, out of ordinary, corrected the 'Watch for XXX%' field to display three digits in GOLD.
- 56623 Oper styling added to screen to support help presentation.
- 56544 Xpress Teller Enhancement: Restyled General-purpose Pop-up Windows.
- 56354 Changed the labelling on the corpID column for 5300 maintenance.
- 56186 Removed VAT extract panel from Tool 320 Cross Sales Analysis Dashboard.

- 57118   Updated GOLD CU*BASE launcher to use configurable Legasuite install version and default to 8.5.

Modifications

- 49847   Added new functionality when an LOC loan is paid to 0.00 so the scheduled payment amount also changes to 0.00.
- 53678   Updated the ISO Control Configuration to display the subfile correctly and update the screens.
- 53840   Update to not allow MAP and MOP to reissue application numbers.
- 54690   Modified Pemco PBF to run outside of a Credit Union into F9=Ops.
- 54823   Adjusted Skip Pay History Inquiry screen to display Tracker Review option.
- 55079   Update to require a credit bureau code when adding a manual credit bureau report record to know which bureau it was pulled from.
- 55110   Rebranded CLR Path to 'Decision Advisor' on CU*BASE screens.
- 55177   Adjusted cd-secure loan creation process to use the traditional call for posting online banking fees.
- 55187   Modified how ISO fees display on the LPANEX reports if the fee takes the account negative.
- 55499   Replace verbiage on screens for NADA to J.D. Power.
- 55590   Updated Tool #1120 Update Card Expiration Dates to highlight records with wrong addresses.
- 55593   Enhanced Tax Process and Tax Dashboard to include 1042S Tax Form.
- 55787   Added an edit in loan maintenance to notify the user to update first payment information if date has not been populated.
- 55824   Screen change for Text Banking Fee config to clarify how the fee waivers work.
- 55978   Update to ensure that data is pulling from EOM files for LMTCD reports automated to pull from prior month.
- 55997   Corrected the Household Summary 'Total Assets' amount so that it does not increase when moving in and out of the screen.
- 56202   Updated the ATM/debit card maintenance program to not write the Activation Verification DOB field to CUFMAINT when the value was not changed.
- 56239   Adjusted Employee Branch Logic in the Loan Productivity Dashboard #1670.
- 56739   Xpress Teller enhancement for shared branching: Retain CUID for "Return to Last Account" functionality then clear the CUID input field after posting.

- 56888   Updated the MOP process to provide a check for MOP submission requirements prior to actual membership creation.
- 56942   Created a whole-file Export function for the all-CU version of the GOLD Release Inquiry.
- 57006   Changed the Membership Designation configuration screen to add the future option for business credit card statements.
- 57129   Corrected the call for APBatch4 with PaymentsOne maintenance driver to include the new parms for adding new EFT fields to Trans1/Trans2.
- 57292   Modify Member First balance and status program to build new cross reference tables used in online banking.
- 57323   Added the two new parms that sets the batch Maint Cutoff Date for APB4 CC maint build.
- 57402   Eliminated error in ATM/Debit Card PBF Processing for CO-OP.
- 56628   Changed the header information on the CO-OP share branch transaction report so that it populates correctly in CU*Spy.
- 56831   Change to prevent Sync1 Decision pulls until the decision model is fully activated.
- 57389   Include additional information on REPAY posting reports.
- 54962   Online loan applications will now flood rent amounts when data is already in household.
- 56045   Change to prevent credit unions from being able to archive Employee IDs reserved for CU*Answers.
- 56102   Correct date format for the month/year to process when running Qualified Dividends Scoring Simulation.
- 56176   Adjustments to GL interface for Kasasa OTB loans.
- 56705   Default Alternate Mailing Address when active to screen when posting checks in Phone Operator.
- 56817   In Midwest Mortgage OTB payment transmit, switch no records email notification to GoAnywhere process.
- 57144   Correct send program name in Reloand/Resend of Safe Harbor Monthly file.
- 57378   Update generic form program to exclude blank pages from printing to ProDoc.
- 57410   Correct encryption error from occurring intermittently when employee is ordering ATM/Debit cards.
- 57444   Recompile program for collateral change.
- 57456   Reset qualified flag when last transaction doesn't qualify for Card Activity Rebate process.
- 57458   Change escrow analysis document format to allow it to be archivable.
- 57483   Recompile CPI program using the file layout from release 21.10.

- 55341   Updated Reg E Opt out/Opt in to display consistently in both update and view options when there is no maintenance date or employee ID information in the table.
- 56181   Excluded closed investment IDs in the lookup when posting investment payments or updating market price.
- 56459   Added warning window to the General Ledger Trial Balance by date report when not general ledgers are selected as the report can be very large.
- 56577   Changed New/Refinanced Loan History report to exclude reversed disbursements.
- 57049   Eliminated a possible system error in the investment dashboard when filtering for the CUSIP data.
- 57105   Eliminated error in Automated Reports for New and Refinanced Loan History Report.
- 57427   Added account security to the last 10 transactions option in Xpress Teller.

Warranty Modification/Adjustment

- 51206   Update to prevent Co-applicant Data Corruption with Experian credit pulls.
- 54547   Adjust the New/Closed account dashboard when working with Open/closed reason codes.
- 55073   Restore the ability to default underwriting codes for the CU*BASE delivery channel.
- 55946   Updated the MOP Online Banking Activation process to ensure new incoming usernames are unique.
- 56218   Eliminated error when hitting enter when working with online banking request and there is nothing listed.
- 56322   Update the card expiration processing tool to correctly handle 6-digit BIN length selections.
- 56454   Corrected error message when viewing 'Teller/Cash Activity' within tool 537 - Monitor Abnormal Transaction Activity.
- 57396   When using loan disbursement to disburse checks are now following the second signature line configuration.
- 57412   Changed statement fee waivers to look at ALL marketing clubs for each member to determine if fee should be waived.
- 57420   Corrected the loan disbursements to use the posting Code's G/L when multiple G/L disbursements are posted and the last G/L Disb. uses the override code of 999.
- 56402   Change to prevent 0 credit score being written to CRBCSH for 1-Click loans.

- 56026   Add logic to Share/CD Secured loans to write out a last maintenance date at creation.
- 57419   Eliminate error message when Accessing Account Composition in Common Bonds.
- 57433   Adjust the fee waiver program for statement fees to not look at the old obsolete record for online credit card waivers.
- 57447   Add account security for teller posting via Xpress Teller.
- 55130   Adjusted indirect Loan Reserves Report to show months open based on month/year to process.
- 55255   Updated AFTA2A to eliminate a secondary description showing from a previous transaction when nothing is configured.
- 56644   Updated override file in Purge **It's Me 247** Messages.
- 57398   Corrected data display error in tool 1855 Lending Opportunities Dashboard.
- 57403   Update to the file maintenance review and negative balance/delinquent account report in tool 402 to reflect only the accounts selected in the criteria.
- 57491   Change to re-enable Skip Pay for line of credit loans.
- 57514   Adjusted the edits when building ANR fees to not look for the old fee amount in the configuration.
- 57519   Adjustment to the Patronage dividend program to calculate percentages properly when closed accounts are configured in the calculation.
- 57533   Corrected posting of cc transaction fees when multiple disbursements are made from a credit card loan at the same time.