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

- 58692 — Change to WorldPay (Vantiv) batch programs to only archive seven days of maintenance files.
- 59348 — Adjusted the expiration date logic in credit card orders.
- 59369 — Corrected issue with a 6-digit BIN being populated in the PANCARD BIN field; needs to always populate an 8-digit BIN.
- 58529 — Adjustment to the matching logic for secured funds for JHA/PEMCO.
- 59463 — Corrected credit card shared pan number logic to not allow more than one active card attached to the credit card loan.
- 59518 — Corrected issue of potential loss of address, phone, email changes on the first of the month in batch maintenance programs.

Enhancements

- 45563 — Created an API for instant issue so any vendor can plug in and process.
- 54729 — Updated Loan Application Queue to lock user access if application is currently being worked.
- 54930 — Added the ability to add an IRA repayment code for certain qualified exceptions and adjust related 5498 reporting for these items.
- 55312 — Batch Unenrollment Tool for Bill Pay and P2P Fraud Mitigation.
- 55601 — Created Phone Optics TEASER Dashboard/Analysis.
- 55722 — Enhancement to Statement Mail Group Code Configuration to allow credit unions to select more options for mail processing with Sage Direct.
- 55754 — List Generator Enhancements (includes UDM and other new filters, screen sizing, and new output options).
- 55769 — Self-directed Data Floods - Batch #4.
- 55901 — Created download file for HMDA Information.

- 56472   Enhancements to Savings Bonus Dividend Program from **Tool #823**.
- 56555   Created New Internal Program for the Toolbox to Adjust Alias IDs.
- 56682   New maintenance program over authorized stored procedure list for new indirect lending process.
- 56886   New CTR batch report.
- 56951   Xpress Teller Enhancement: Adding Secondary Trans Descriptions to Teller Transactions.
- 56970   Updated Red Flag Monitoring for phone number changes to include all phone numbers from MASTPH.
- 57418   Incorporating Native Receipts into Xpress Teller (CU*BASE configuration and related components).
- 57429   Updated Xpress Teller posting programs to add receipt data to new file for the Native Receipts to eliminate spool filing for imaging.
- 57751   New Process to automatically create packaged loans in the Participation Loan Software.
- 57808   Built a process to encrypt identified PII field for those clients that use Experian.
- 57861   Display alphanumeric suffix of OTB account in Inquiry and Phone Operator when Total Look is turned on for OTB Product.
- 57897   Insider Audit/Due Diligence Report Prompt Screen Enhancements.
- 58347   Build a member account number cross-reference for custom SSO interfaces with online banking.
- 58794   Created new canned query for the SECAUD table.

GOLD Screen Modifications

- 58244   Sped up Photo ID Retrieve in Xpress Teller.
- 59004   Eliminated error message displaying on Verify ID screen in Xpress Teller.
- 59030   Developed a GOLD screen over the Subsystem Management dashboard (**Tool #5199**).
- 59032   GOLD Operations Home panel sometimes gives Script Stack Overflow message when an option is clicked.
- 59043   GOLD Issue Only: Function keys on GOLD Panel 5185 for a Non-Member Organizational now showing properly.
- 59062   Updated Remaining SMTS Help Link in GOLD to New URL.
- 59120   Changed GOLD's Legacy Checks SSO to execute synchronously.
- 59135   GOLD Issue encountered when maintaining eAlert/eNotices in **Tool #14**.

- 59145　　　Adjusted Household Stats Summary screen to avoid missing expense/income ratios.
- 59159　　　Correct the Excel Export Feature Within **Tool #857:** *Learn-From-Peer: Tiered Svcs Peer Analysis*.
- 59195　　　Adjusted screen title in Configure Misc Member Account Forms.
- 59197　　　"Bullet" images on GOLD Network Links window now use CUSO-specific targets like the text buttons do.
- 59218　　　Revealed the RDC Enrollment flag on the Online Banking Info window via PITT screens (Phone/Inquiry etc.)
- 59255　　　In Phone Operator, corrected the highlighting of the member name when a 'long last name' is added to a member account.
- 59260　　　GOLD panel changes to the Loan Category Automated Rate Changes config screen.
- 59274　　　Removed GOLD script that automatically modifies the LWC file.
- 59332　　　Oper styling for help presentation.
- 59460　　　Updated the print button (printer symbol at bottom of GOLD screen) to work for the loan delinquency analysis report screen.
- 59671　　　Updated GOLD Homepage Graphics for the 22.10 Release.
- 59700　　　Fix to the Collateral Identification Screen to Ensure "Get Value" Button Always Appears.
- 59768　　　Corrected a scripting error when launching the Idea Form link.

Modifications

- 57623　　　Change to allow recurring A2A AFT recurring transactions to process Escrow Account deposits.
- 58926　　　Change to default the allowed shared branching option for new memberships opened through MAP/MOP to yes similar to other membership opening.
- 59179　　　Program modifications for Transfer API's used with **It's Me 247** to allow access and usage within BIZLINK closing the gap between the two applications to share common resources.
- 59187　　　Updated the ACH Exceptions and NSF/Returns tools to clear table in QUERYXX when exiting program.
- 59298　　　Created a CSV of data from the ALERTCTL table to be sent to Analytics Booth.
- 59762　　　Add new clients to the API program driver.
- 55796　　　Added a fourth option in the additional signer screens for authorized user.
- 55999　　　CU*BASE data file exchange with Ascensus.
- 56049　　　Enhanced CPI Posting programs to automate the billing.
- 56260　　　Removed edit that does not allow for teller drawer to teller drawer

transfers via **Tool #32**.

- 56933   Added Credit Card Cash Advances from ATMs to the BSA Cash Log.
- 56958   Accounts Payable - Adjusted the payment processing date used when A/P payments are processed.
- 57061   Improved screen flow for activation of Text Banking.
- 57186   Xpress Teller enhancement - $0 memo transactions for cashed checks and misc. advances.
- 57609   Screen Changes to the Block List for in-house checks feature to eliminate the ACH verbiage.
- 57785   Changed the Fraud Alert/Blocked Persons List to always display the full SSN/TIN and allow search on full SSN/TIN.
- 57880   Receive and process import file from InfoPro - updated Tax Escrow Disbursement file.
- 58019   Eliminated error on AFT when the Total Shares exceeds the amount allowed in the program.
- 58114   Created a canned query over CHEXSLOG table.
- 58256   Minor updates to use standard print window.
- 58335   Removed "Shared Branching" Title from Miscellaneous Advances and Miscellaneous Receipts Screen(s) in Standard Teller.
- 58372   Added "Custom Account" Field as an option on the Loan Creation Screen in **Tool #2**.
- 58488   Created a new table for 1098 mortgage balances to be used for converting credit unions where the mortgage was built in the current year prior to conversion.
- 58701   Changed member import to fill in default gender; remove edits that require county & marital status when working online apps.
- 58748   The nightly process to move ISO transactions to ISOCUDATA required a correction to create the ISOCUDATA table and logical on the fly if they do not exist and the credit union is configured to collect ISO DATA.
- 58870   Adjustment to Native Receipts settings tables to handle credit union settings history.
- 59027   Added Freeze Code 1, 2 and Closed comment above account number on LACHXC ACH Report.
- 59465   Updated ISO Control 2 maintenance program to allow maintenance while subfile is filtered on Vendor ID and Server Type.
- 59488   Corrected EOD backup order to go by time zone.
- 59810   Corrected missing decimal point in Loan Package Summary panel 4297 (LNSUMMR-01).
- 59818   Eliminated error in Xpress Teller when backing out of the Funds-

In screen and there are many comments for the membership.

- 59838   Removed the reference to CRT from the Financial Statement Report screen from **Tool #640**.
- 57549   Updated open membership process from an indirect loan to run an OFAC Scan if adding a joint owner.
- 58455   Allow CUNA Loan Tracker file creation and send to be run in ROBOT.
- 58730   Changed eStatement enrollment email message for member to include reminder to log into online banking to complete enrollment.
- 59114   Change 1Click Share secured loans via OLB so the pledged share record releases as the loan is paid.
- 59835   Eliminated error in the update process in CU Time Zone Combinations maintenance.
- 59843   Eliminated error message on second library when running Encryption for Credit Bureau files for multiple credit unions.
- 58897   Change to GoAnywhere to match new vendor server.

Warranty Modification/Adjustment

- 58405   Change to ensure that fixed asset tag/serial number report includes all items.
- 59364   Common Bonds Analyses will now return results when products are organized by all application types in **Tool #596**.
- 57956   Receipts for loan disbursements are now correctly showing all the transactions performed.
- 58068   Resolved the records displayed in the audit record when filtered by account number.
- 58778   Address changes now create an audit tracker and trigger the red flag warning when WRADD = 1.
- 58896   Corrected Populating of CRBSUM Employment Fields from Sync1 Credit Reports.
- 59093   Defaulted the 'Allow share secured via OLB' to N for new DIVAPLs.
- 59643   Corrected the format on Joint Owner data on Misc. Member Forms.
- 59775   Eliminated programming error message when attempting to process monthly subsidiaries.
- 59556   Corrected the data in the DIVAPL records where corrupt data exists for the "Allow share secured in OLB flag".
- 59860   Accounts Payable vendor number lookup is now showing and

accounts payable vendors for selection. Multiple selection for the delinquency report is also displaying appropriate records.

- 59886   Restored the display of transaction history for IRA accounts in online banking.
- 59844   Corrected product selection option in Membership List Generator **Tool #447**.
- 59845   Native Receipts now populate new table for all configured branches and add default setting when new branch is added.
- 59851   Corrected date conversion issue and aggregate balance selection in Membership List Generator.
- 59861   Native Receipts: change to have application launch when workstation printer is set as ProDOC Writer.