CU*BASE 22.05 Release Resource Companion

May 2022

CU*ANSWERS
The Writing Team

This edition of the Release Resource Companion covers new and updated materials related to the 22.05 Release of CU*BASE. Take a look at the topics below to view updates to the CU*BASE software, booklets and additional resources, all collected in one convenient document for your staff!

New Video!

Share Secured Loans

This video shows how members can set up a Share Secured Loan, including selecting the loan amount and term, signing and submitting forms, all from a phone or mobile device. View the video!

New AnswerBook Items!

Includes 16 items for Share Secured Loans and 3 items for Written-Off Loans!

How does the freeze on CD and Share Secured Loans work?

Learn more about this topic.

Can we charge a fee for the CD or Share Secured loans service?

Learn more about this topic.

What determines the amount and rate of a CD or Share Secured loan?

Learn more about this topic.

What determines the term of the loan for CD or Share Secured Loans?

Learn more about this topic.

How does the member access CD or Share Secured Loans?

Learn more about this topic.

Visit the AnswerBook for additional items related to Share Secured Loans! Click here to view a full list of frequently asked questions for this topic.

Will CU*BASE keep track of daily loan interest even after a loan has been written off?

Learn more about this topic.

I noticed a value in the "Int accrued since write-off" field on a written-off loan, but that amount doesn't match what I would have expected, since this loan was written off a few years ago.

Learn more about this topic.

What is the calculation for "interest accrued since write-off" on written-off loans?

Learn more about this topic.

Updated Help Topics

Overview: CD and Share Secured Loans

With CD Secured loan offers or Share Secured loan offers, you can now give members the same YES online that you would in person. These are low-risk loans you can offer directly to members via **It's Me 247** online banking, with no underwriting, no credit check, and no need for your underwriters even to get involved. Click here to learn more.

Overview: Xpress Teller Transaction Limits

Place incoming and outgoing transaction limits on your new tellers using Xpress Teller. Click here to learn more.

Updated Booklets

Certificate and Share Secured Loans

Information on Share Secured loans has been added to all sections of the booklet, in addition to existing sections on CD Secured Loans. These include the FAQ section, the section on what the member sees, and the configuration section. Click here to view the updated booklet.

Write-Off/Charge-Off Tools for Loans

New screenshots of the Write-Off and Charge-Off screens have been added, as well as descriptions of additional new fields where more information can be recorded and updated. The new *interest accrued since write off* field is explained, with emphasis on how it relates to 5300 Call Reporting. Click here to view the updated booklet.

22.05 Appendix: New Online Help Portals

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As you may have noticed, The Writing Team refreshed all our online documentation portals with release 22.05 (with some previous implementations also mentioned below). Check out these links to see what's new out there in the documentation world. Remember, if you have any bookmarks to the old URLs, you should update them to the new URL formats listed below!

CU*BASE Tool Documentation and Online Help

https://help.cubase.org/cubase/Welcome.htm

This help site is the main CU*BASE tool website. Notice that the look and feel of the website has been refreshed, allowing for more clearly defined Field and Description tables, as well as a more robust HTML5 layout. Users can easily jump to all other documentation portals via the main menu at the top of the screen. Users can navigate to the bottom of each page to submit questions to our Client Services and Education team via Answerbook. Be sure to bookmark any saved pages with the updated URLs!

The Help Hub

https://help.cubase.org/hub/Content/Home.htm

This help site is a new addition to our suite of documentation portals, and we're excited for you to dive in! This new site organizes documentation in new ways, allowing users to browse categories for related online help pages, view topic overviews for longer form explanations of processes and tools, see our additional resources, and participate in The Idea Lab where we will test new features and functionality with online documentation. We're always open to feedback on the website! Email the site admin at helphub@cuanswers.com with any comments or questions.

Show Me the Steps

https://help.cubase.org/steps/Content/Welcome.htm

The step-by-step content you love, refreshed and updated to an HTML5 layout with new and updated topics to browse!

OPER Tool Documentation and Online Help

https://help.cubase.org/oper/Content/Welcome.htm

This help site is the tool documentation portal for our CU*BASE Operator Edition (OPER) suite of tools. Used for our internal operators and self-processing credit union staff, the OPER online help saw a facelift and a revision to HTML5 output as well.

Previously Implemented Documentation Portals

5300 Call Report Account Code Help

https://help.cubase.org/5300/Content/Home.htm

Users who generate the 5300 Call Report for the NCUA can retrieve documentation for each of the account codes listed in CU*BASE by using the related account code lookup feature. This online help portal got its facelift in November 2021, and if you haven't yet checked out the updates, now is a great time!

It's Me 247 End-User Online Help

https://itsme247.com/Help/Content/Features.htm

Our online banking members also got new online help in November 2021! The updated member portal is available at the link above for all users of online banking, by selecting the "Help" link in **It's Me 247**.

Biz Link 247 End-User Online Help

https://bizlink247.com/Help/Content/Features.htm

Our business online banking members also got new online help in November 2021! The updated member portal is available at the link above for all users of Biz Link online banking, by selecting the "Help" link in **Biz Link 247**.