



# May 2024 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 May.

## Architectural Change

- 63951 1Click process base architecture change.

## EFT Modifications

- 62916 Modified CO-OP VAU/ABU to only send what is entered in screen fields for a card reorder regardless of opt In opt out status.
- 63992 Correction to change of address logic for CO-OP credit card batch maintenance build.

## Enhancements

- 56725 New tool to force post Credit Card Debit exceptions.
- 57851 New structure for future enhancement to reward members for using plastic at local retailer/companies.
- 58075 Add separate card order address captured and stored with card order.
- 58827 New Email notification process for incoming online banking requests.
- 59139 Create structure for Payrailz A2A solution.
- 59912 Add Export feature to various reports/dashboards in CU\*BASE.
- 60055 Create credit limit field to define the max amount a member can overpay credit card loans in online banking/ARU.
- 60086 Create separate OPER config for ARU settings.
- 60092 Handling Principal Curtailments on Interest-Only Loans When Late Payments are Received.
- 60108 Add ability to have on-demand ACH fee be covered by incoming deposit.
- 60413 Fields added to the Dealer configuration.
- 60502 Enhancement to A2A Exception report.
- 60595 Update to ACH distribution to add OLB maintenance lock flag and account lookups.

- 60647 1 Click Unfunded Loans.
- 60664 Native Receipts for ALL channels.
- 60716 Expand new member comment to allow CU to customize.
- 60738 Add CU selection screen to Print Statement Control Reports.
- 61133 Standardize the GL Account Control Configuration.
- 61134 Update the Account suffix configuration tool.
- 61370 Change to tax reporting for foreign citizens.
- 61483
- & 61136 Enhancements to the Concentration Risk Analysis Dashboard.
- 61524 Participation Loan Reports Export.
- 61537 Phase 2 Enhancements to Package Loans to be sold.
- 61584 Create a "Look up an IP address" dashboard.
- 61641 New Preferred Terms in Master Parameters.
- 61644 New Corporate Check Reconciliation Tool.
- 61647 New view only option for online banking configurations.
- 61772 Add Red Flag Alert when working with a Loan application.
- 61817 Add export option from processor database **Tool #1033** and toolbox.
- 62102 Add CU\*Forms to account opening process.
- 62252 New canned query to access NSF transaction table.
- 62655 Add ATM Terminal ID Lookup to ATM Deposit Hold Maintenance.
- 63926 Corrected change to ODPFLAG and recompiles for project #63119.
- 61695 Native receipts support for CO-OP shared branching.
- 63584 Created a program to run daily job for populating unique ID cross reference file.

## GOLD Modifications

- 62992 Correction to **Tool #30 Member Account Adjustment (Coded)** to Properly Advance to the Next Field After Selecting an Adjustment Type Code.
- 62999 Corrected Page Down Issue on GOLD Credit Decision Screen.
- 63059 GOLD modification to correct display of buttons on **Tool #535**.
- 63186 Corrected Tracker Program to Accurately Display Information When Moving Between Conversations.
- 63369 Corrected the mapping of the Backup Arrow in **Tool #13 Work Online Banking Apps/Requests** to exit out of the tool.
- 63504 Updated GOLD homepage graphics for the 24.05 CU\*BASE Release.
- 63522 Modified iPay Payees screen to toggle Open/Closed Membership and Show Enrolled/Unenrolled.

- 63598 **Tool #785** is now showing all records in subfile in GOLD.
- 64004 Adjust misc forms tool to select the proper forms when chosen.
- 63982 Adjust the order of entry fields in member inquiry when auto-security is off.

## Modifications

- 58064 Search Engine 3.0.
- 58984 Allow FIDM process to be run for all group providers or a single group provider.
- 60741 Added CU Name used for Credit Bureau Reporting ID.
- 60807 Adjustment to HMDA screen.
- 60962 Adjustment to prevent status code of "X" remaining on a transaction processed in stand-in once it's been posted.
- 61028 Created a process to re-receive and post iPay Bill Pay for a previous day.
- 61117 Create a view only tool for HSA balance information.
- 61234 Revise tips on e-mail maintenance screen.
- 61521 Modified Payments One batch maintenance programs to look at configuration to determine if status should be sent in batch maintenance, flood the corresponding fields to N.
- 61528 Updated the PSCU batch maintenance send programs to run off of a data area with a status of each credit unions send so if one CUs file fails, the rest continue to send.
- 61705 Updated description for AC System Memo Type to read 'Personal Information Change'.
- 61980 Add PSCU device types to BIN configuration.
- 62032 Increase library size for AI\*Engaged library statistics.
- 62204 Change to request credit report screen to allow entries for only 2 Individuals.
- 62305 New maintenance program for PSCU Rewards ID.
- 62367 Adjusted the location of the entry field for the "First 3 characters of last name" in the shared branching transfer screen to show after the label.
- 62503 Adjusted the value for "override effective posting date" when adding ACH records to the ACHDST file and the company ID is used by multiple company names.
- 62422 Internal change to add type option to restore of encrypted type.
- 62445 Increase Size of Age of Member for **Tool #984**.
- 62644 New toolbox option to set phone numbers to invalid when restoring libraries.
- 62646 New sequencing confirmation for custom query.

- 62804 New maintenance program for AmpliFi Rewards.
- 63006 Change to the ATM surcharge program to only rebate actual ATM surcharges.
- 63180 Remove CU 'from' e-mail address maintenance from AP Workflow controls.
- 63215 Modified the batch maintenance send program to accommodate running in Robot.
- 63221 Analytics Booth: modified data collection routine to include deconverted credit unions.
- 63343 Overlay Change to Generic Risk-Based Pricing Forms.
- 63401 Changed Midwest create and xmit programs to have confirmation screens conditional so they can run in robot.
- 63538 Updated the amortization API call (indirect lending) to return correct response codes when SSN not found.
- 61856 Add permissible purpose code to the credit bureau setup in Integration Manager.
- 63283 Improve the login process for PIBMLO component of **BizLink 247** suite to better handle invalid entries
- 63309 Update TruStage Protection Advisor Integration to Update Former CUNA Name Branding.
- 61238 Adjusted participation loan analysis report to pull PLI totals from previous month/year if entered.
- 63077 Modified FUEL performance report to correctly reflect application number.
- 59206 Change to Prevent OBAPI ACH errors from occurring.
- 64040 Add records to the OTB account cross-reference file for new student choice loans.

## Warranty Modification/Adjustment

- 61084 Corrected Phone Transfer when using the Post/Return button on a partial payment to a loan using 360/post, when the user backs up from the 'Special Mtg Payment Options' window.
- 61699 Corrected "Prompt for Marketing Club Enrollment" Workflow from within **Tool #777 Savings/Checking Products Configuration** in specific dividend applications.
- 61943 Adjustment to Text Banking workflow warning messages.
- 62138 Correction to **Tool #495 Member Aggregate Bal Analysis/File Build** to properly identify non-IRA accounts.
- 62178 Adjusted risk-based pricing table if flag is not checked.
- 62244 Correct 1Click deposit secured loans to assign loan rate based on rate tier.

- 62269 Accessing the Custom Fields Screen in **Tool #20 Update Member Account Information** no longer allows Bad Data to be Saved in the Loan Category Field.
- 62697 When adding an additional signer ECOA (2) to a loan the ECOA for the primary borrow will now change to a 2.
- 63456 Correct issues that occur when editing a loan application.
- 63910 Updated 'get ira transaction' procedure to include a withdrawal reason in response for Ascensus integration.
- 63911 Correction for Associated draft return program.
- 63837 Analytics Booth: Update to show the proper decimal precision on weighted average rate.
- 63337 Correct invalid edit message when updating loan products.
- 64037 Adjusted the ACH on-demand maintenance to eliminate invalid edits when attempting to turn off the ACH on-demand feature.
- 62016 While trying to create a CTR though teller, a teller will no longer be allowed to delete a location.
- 63060 Corrected bureau information defaulting into loan denial process.
- 63993 Corrected the process for getting member status during amortization of indirect loan applications.
- 64089 Change to special authority to allow one click process to be utilized.
- 64090 Change to Fee analysis inquiry to eliminate an error when viewing ACH on demand posting settings.
- 62636 Adjustment to Xpress Teller to retain employee ID and vault number when navigating additional service pull up.
- 62807 Corrected the share rate board in CU\*BASE rate inquiry to use the minimum balance when reading/displaying records.
- 64087 MOP online banking enrollment fix.

## Web Modifications

- 63399 Add navigation to AFT and eAlerts on the success page for secured loans in online banking.
- 63731 Update .NET DB2 drivers used in online banking software.
- 63758 Update Plaid integration compatibility with stand-in.
- 63770 Standardize interest rate display when a member completes a request for a secured loan in online banking.