Release Summary and Information

Product	Release Date	Released to the Following
CU*BASE® GOLD **Version #** **24.05**	**May 5, 2024**	• Online Credit Unions • Self-Processors • Site-Four Credit Unions
Documentation Updates: Updated resource guides and online help topics will be posted on our website no later than: **Friday, May 3, 2024**	**Additional Resources:** Database Changes Tool Changes Register for Release Training **Available Soon:** *Release Training Video* *Resources Companion Guide*	**Key to the Symbols:** You'll see it immediately. You'll need to activate it. You'll need to work with a CSR to set it up. There may be related fees; contact a CSR.

This release includes changes to key database tables (files). **You must update your automated Queries** before their next scheduled run date! See the separate Database Changes announcement for instructions.

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Featured Enhancements

CU*Forms Now Added to the Account Opening Process!

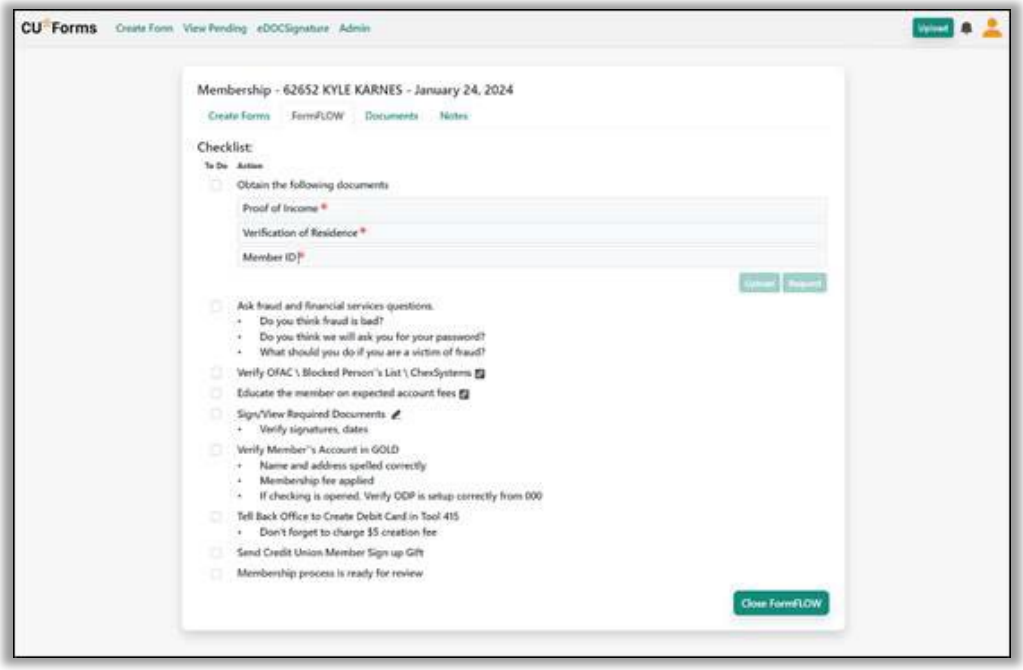
Learn more: online help

CU*Forms is more convenient than ever! Now you can use this popular forms-generation tool to replace the disclosures, signature cards, and other forms used for new accounts, and then have those forms automatically generated when new accounts are opened in CU*BASE.

When we first started developing CU*Forms, we built it without interacting with the membership workflow process; credit unions were manually navigating to the CU*Forms website to start the form creation process. Following the 24.05 release, when creating new memberships or doing maintenance on accounts you will be prompted to jump from CU*BASE right into CU*Forms, where it will select your predesigned forms with our new *membership form* product. Not only will it select the forms you designated for your member products, it can also look at membership designation to override forms in the case you would want business forms presented instead!

As we understand membership workflow isn't just about forms, we created a new product called FormFLOW, which gives your credit union the ability to create a membership checklist. This checklist is completely customizable. Use the following items to help your staff have a successful and predictable membership opening every time.

- Upload/request documents from the member that save to your credit unions archive.
- Place bullet point steps that need to be completed before or after the signing process.
- Easily jump out to a website to obtain documentation, like a fee schedule.
- Notify staff members of steps they need to complete.
- Notify your auditor when the opening process is ready for review.
- Audit document automatically created and saved stating who/when completed each step.



If you're already a CU*Forms user, contact imaging@cuanswers.com for next steps of turning on this feature. If you have not turned on CU*Forms yet, sign up today and get started!

Become Your Member's Auto Loan Resource with 1Click Unfunded Loan Offers

Learn more: online help

With this release, we are excited to introduce 1Click Unfunded Loan Offers, which is a new type of 1Click offer that will provide an opportunity for credit unions to expand their secured loan portfolio!

Configured in **new** **Tool #1045** ***Configure 1Click Unfunded Loan Offers,*** 1Click Unfunded Loan Offers keeps the same 1Click functionality that you know and love, while enabling your credit union to present a pre-approved secured loan offer to members in online and mobile banking, but without immediate funding and loan creation.

For example, a member could be pre-approved for an auto loan up to a maximum of $50,000, and included in the offer would be the pre-approval details and the name/address of the dealership (the specific dealership is configured by the credit union). If the member chooses to accept the offer, they will receive one or more custom forms that will be presented for e-sign, showing the dealership name and instructions on what to do next. The member would then take the form(s) with them to the dealership for purchase negotiation.

After acceptance, the application will be placed in the CU*BASE loan application queue as a pending 1Click offer. Once the credit union receives complete paperwork from the dealership, a credit union employee would edit the application to match the closing documents, then book the loan and send funds to the dealership per usual.

1Click Unfunded Loan Offers are a great way to stay top of mind for your members before they go rate shopping through a dealership; help your members get pre-approved by your financial institution that they know and trust!

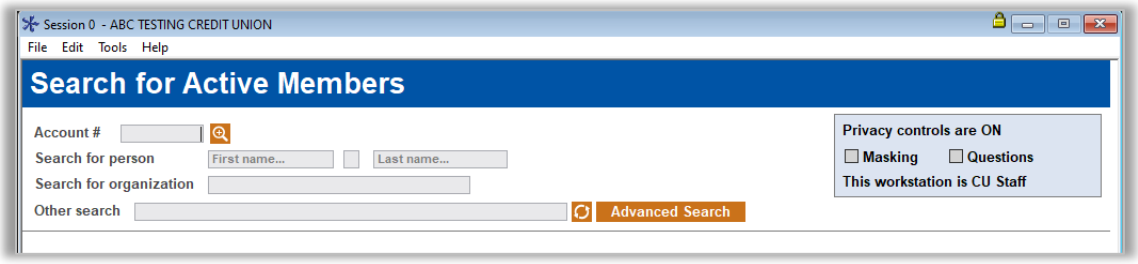
Teller/Member Service

We heard you! Better Search Results in Inquiry and Xpress Teller

Learn more in online help

With this release, we are enhancing the new search engine in Inquiry and Xpress Teller to add in a *Search for person* section with an area for a first name, last name, and middle initial. A *Search for organization* field will be used to find your organizational accounts.

We hope this further development of the new search functionality will result in fewer false results and will solve the remaining concerns clients have voiced to us about the new search engine. Additionally included in this enhancement, the *Other search* has been expanded to fifty characters, enough space for those long email addresses! We have even corrected the problems associated with finding hyphenated names and names with an apostrophe!



Currently, this enhancement will be introduced in Xpress Teller and Inquiry only, but we have plans to phase this into other global searches throughout CU*BASE. *If the search was keeping you back from exploring Xpress Teller, maybe now is the time to give it a new look!*

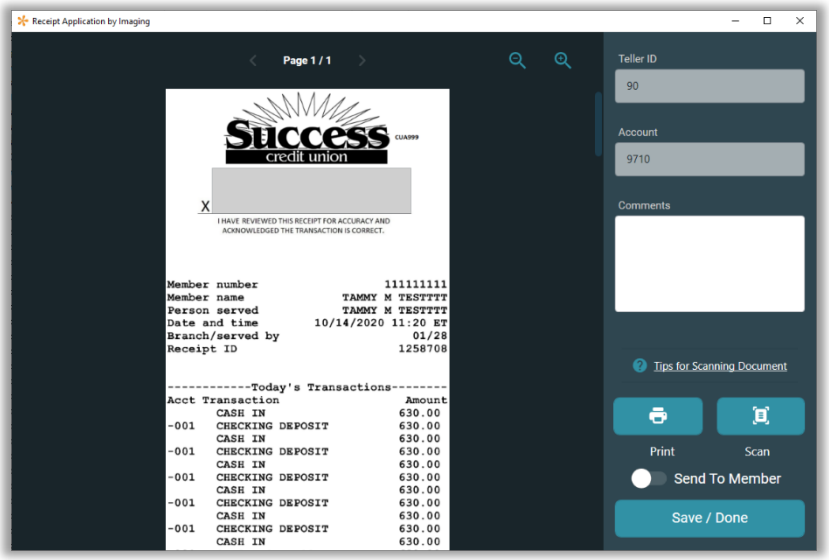
Print All Receipts with the Native Receipts Application! It's Not Just for Xpress Teller Anymore!

Learn more in Native Receipts and online help

In the October 2022 release, we created a new lightweight receipt processing application called Native Receipts. Native Receipts allows tellers to view, sign, print, and archive receipts, replacing all the functionality currently performed by ProDOC and the "R" print sessions for receipts for Xpress Teller.

Fast forward to today, and we think you will want to give Native Receipts another look!

Now Native Receipts can print high quality receipts for ***all receipts*** that print from CU*BASE, be they from Standard Teller, loan receipts, receipt reprinting, Phone Operator, just to name a few.



Check out these exciting features of Native Receipts;

- Modernized look and feel.
- Saves logo with receipt so reprint from iDOC Vault includes this information.
- Optionally send receipts to member storage in **It's Me 247**.
- Account balances will be printed on receipts to match the point in time when the receipt was printed. *Additionally, we have added new functionality for you to mask balances for joint owner receipts when they are not on the account.*
- No need for a receipt print session.
- Replacement for ProDOC Receipts
- Supports Marketing Messages

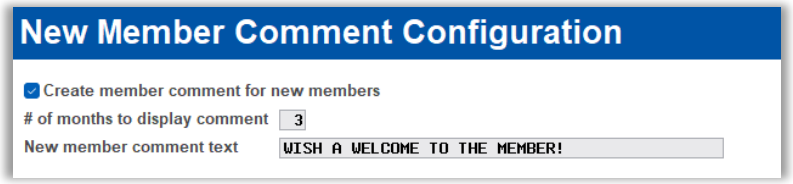
Configure Native Receipts in **Tool #1775** ***Xpress Teller Workflow Controls*** and now also and **Tool #1005** ***Workflow Controls: Teller/Member Service***. *If you already have Native Receipts configured in Tool #1775, the controls for Branch 01 will be flooded into Tool #1005 at implementation.*

New to Native Receipts? Initial setup is required by the Imaging Team. Sign up for Native Receipts today! https://store.cuanswers.com/product/native-receipts-active-beta/

Customizable New Member Comment Now Available

Learn more in online help

Thank you to Illinois Community Credit Union for this Idea Form!



Now you can improve the way your credit union serves members! This enhancement allows a credit union to customize the response to frontline staff on new memberships, instead of the current coded messages that says to Welcome New Member and the date the membership was opened. Configured in **Tool #551** ***New/Closed Reason Codes/Comments Config***, the new customizable comment will help drive efficiency when working with new members, while also communicating what is important to frontline staff on new accounts, such as specific holds that adhere to CU policies.

CEO/Management

Skip Available Balance Verification When Drawing On-Demand ACH Fee from Member's Account

Learn more: online help

Have your members asked to pay their On-Demand ACH (Instant Deposit) fee from their incoming deposit? It's not uncommon that a member tries to post an On-Demand ACH transaction, but the transaction fails because they don't currently have a sufficient balance available to pay the fee. With this release, we're introducing an option for these situations.

We've added a configuration flag in **Tool #569** ***Online/Mobile/Text Banking VMS Config*** that lets you instruct the system to skip the available balance verification it normally runs and assume the incoming deposit will cover the fee once it is posted. This new option has separate configuration flags for Phone Operator and online/mobile/web posting; just uncheck the new *Base deposit (seq 99) suffix must have sufficient funds for fee in advance, without the incoming deposit* checkbox in the ACH On-Demand Posting Services configuration option.

With this change, if the member chooses to draw the fee from the base deposit (99) account, the system will post the transaction, regardless if sufficient funds are available beforehand to pay the fee.

Remember that the ACH item must be posted as we receive it. So, we're not technically taking the fee from the incoming deposit itself but rather assuming that once all distributions have been posted, there will be enough funds left in the base deposit (99) account to cover that fee. This may occasionally result in an account with a negative balance, so make sure your collections team is aware.

Members can still choose to pull the fee from any savings/checking account, of course; the new functionality comes into play only if they choose the account where the deposit itself will be posted. *Note: Deposits that are configured to post directly to a loan are not eligible for the new functionality; in that case the fee must still come from another savings/checking account with sufficient funds.*

Enhancements to the Concentration Risk Analysis Dashboard

Learn more: online help

We have enhanced **Tool #*592 Concentration Risk Analysis*** to help build better safeguards for a credit union's loan portfolio. This update allows a credit union to enter its CU risk policy limit percentage for comparing to the Concentration Risk calculated and displayed on the dashboard. In a nutshell, this will help a credit union make sure that loans are spread evenly in all areas.

The Concentration Risk Analysis is a powerful tool that will assist a credit union in defending and managing lending practices, as well as staying informed about the concentration risk associated with different segments at your credit union.

New Dashboard Allows for Easy Review of Online Banking Logins

Learn more: online help

From the suggestion of the CU*Answers Client Services and Education team comes **new** **Tool #1044 *OLB Logins by Account Base/IP Address,*** which will help your staff review member logins to online banking. This new dashboard contains the login date, start time, IP address, and the session ID directly from the AUDICC table. There's no longer a need to query the information, as the lookup fields allow for account base OR IP address to quickly access the member's login history right from the dashboard. This tool may prove useful in your fraud research, allowing you to quickly view associated logins from the IP of a bad actor.

Quick Fact Corner! What's an IP address?
An IP address (Internet Protocol address) is a numeric label assigned by your internet service provider (ISP), and it's used to identify your device among billions of connected devices. Remember, most IP addresses are dynamic, which means that they may change based on need from your ISP, as well as how you're connecting to the network. As an example, computers that connect to Wi-Fi are using the IP of the network they're connected to. Keep these IP address tips in mind while you research member's activity; you may see some patterns or changes in IP based on the member's activity!

Export Feature Added to Various CU*BASE Dashboards and Reports

Learn more: online help

You asked, we listened. That's right; we've added the export feature to SEVEN CU*BASE tools! You can now export even more data from CU*BASE to member connect or dashboard lists.

The export feature was added to the following tools:

- **Tool #159 *Audit CU File Maintenance (CUFMAINT)***
- **Tool #578 *Particip. Loan Delinquency Analysis Rpt***
  - We've also added the investor name to this report!
- **Tool #579 *Participation Loan Analysis Report***
- **Tool #589 *PLI Settlement Activity Report***
- **Tool #590 *PLI Trial Balance***
- **Tool #649 *Print GL History (daily)***
- **Tool #1033 *My CU's Vendors and Services***

Get Notified for Online Banking Change Requests

Learn more: online help

This commonly requested enhancement allows our credit union to specify an email address to receive notification when contact requests and personal information change requests are received from members in online banking.

Your credit union will configure the email address that will receive the notification in **Tool #569 *Online/Mobile/Text Banking VMS Config*** (under the *Online/Mobile Web Banking Features* option). As this field only allows for one email address, we recommend using an internal group email or distribution list email. Requests are still worked via **Tool #13 *Work Online Banking Apps/Requests***.

Note that this does not change the other request types which are configured elsewhere:

- The notification email for membership applications is defined as part of your MAP/MOP configuration in CU Publisher.
- The notification email for RDC enrollments is handled as part of the RDC enrollment configuration (Tool #1655).
- Loan Leads (which are incomplete loan apps not sent to the normal lending queue) are governed by Underwriting Code configuration, the same as loan applications.

More Options for Tax Reporting for Foreign Citizens

Learn more: online help

Beginning with this release, new options for 1099-INT and no reporting are available to use with your foreign citizens that will give your credit union staff additional options for reporting the member's dividends for the tax year. If your credit union has the 1042-S form activated, you will also see this as a third option. Use **Tool #15** ***Update Membership Information*** to make any needed changes (at implementation, no member status will change).

Need to sign up for 1042-S tax forms? Visit the Store to get started!

Lending

Log More Information with the New Fields Added to Dealer Configuration

Learn more: online help

Thank you to Monroe Community Credit Union for this Idea Form!

Do you want more information about your credit union's preferred dealerships in CU*BASE? Now, when using **Tool #245** ***Dealer Information Configuration***, you can add more information such as email address, financial institution account/routing number(s), and free-form comments.

The configuration is also updated so that the only required fields when adding or maintaining a dealer are the dealer number and name (previously, information such as Description, Address, City, and State were required to add a new dealer).

Update to ACH Distribution to Add a Lock Flag in Online Banking, Plus New Account Lookups

Learn more: online help

Thank you to Wexford Community Credit Union for this Idea Form!

Now in **Tool #989** ***Work With ACH Members/Companies*** and **Tool #112** ***ACH Member Inquiry***, credit unions can lock certain ACH distributions in the ACH Distribution Maintenance screen to ensure that a member cannot make changes in online banking. For example, if you have a member with a delinquent loan, you can lock changes to distributions on the user-end to ensure that payments (set up by CU) to the loan are being made.

We have also added the Global Search feature for account number, a new account type lookup to the ACH Distribution Maintenance screen, and last but not least, a GL lookup option for ACH transactions to GL accounts.

Debt to Income (DTI) and New Sold Package Loans Tool Added to "Package Loans to be Sold" Feature

Learn more: online help

Packaging Loans for Sale (**Tool #574 *Package Loans to be Sold***) is used by a credit union to participate or sell a portion of their loan portfolio. With this release we have included the Debit to Income (DTI) ratio as an option to help filter your loan package and include it on the *Potential Loans to be Sold* report.

We've also added **new** **Tool #1046 *Loan Packages Sold*** to work with and view details of packages that have been finalized and sold to an investor.

New Optional Handling of Principal Curtailments on Late Payments on Interest-Only Loans

Learn more: online help

We've heard your concerns about how the system handles automated principal curtailments on interest-only loan payments if the member is paying only a few days late and also pays more than the scheduled payment amount.

Now, as long as the payment is made before the next payment change date (the "cycle date"), you can elect to have the extra funds automatically posted as a principal curtailment or keep payments as they currently are and have the extra paid according to your matrix, with interest covered first.

Register here for a Lender*VP training session to learn more about this feature.

Red Flag Alert Warning When Working Loan Applications

Learn more: Red Flag Message Overview and online help

Now your credit union has the option to generate the audit/red flag warning message when creating or working with a loan application to alert that a member's personal information has changed in a configured number of days. This will help warn loan officers to check for potential fraud situations, such as if a member's information was fraudulently changed in order to prevent them finding out about the loan application. *This is the same optional red flag warning that displays in other areas such as Teller, Phone Operator or Member Personal Banker.* Use **Tool #750 *Red Flag Controls*** to configure loan application processing with the red flag warning message.

EFT

Begin Setting Up Retailer Groups for Future Reward Enhancements

Learn more: online help

Thank you, Element Credit Union, for the work on this ongoing enhancement!

We are continuing our development on rewarding members for their purchases; much like the Merchant Category Code based programs, we've now introduced retailer groups! This new function allows you to take the first steps to reward members in credit card cash back and debit card rebates, all based on where they shop.

In this release, **new** **Tool #1042 *Work with Retailer Groups*** gets your credit union ready to define local retailers/companies so that you can reward members for using specific retailers. This setup can take some time and research - a caveat to keep in mind is that the entry of the retailer names will need to match the transaction files that we will be comparing against; remember to be precise in your entry! We recommend using existing tools, such as **Where Your Members Shop**, to begin creating these groups.

Remember, like the Merchant Category Code development, creating your groups is the first step. We'll announce more soon regarding the next steps to turn on the retailer group functionality.

New Credit Card Overpayment Limit

Learn more: online help

With this release your credit union can now define the maximum percentage a member can overpay their credit card! Using **Tool #458** ***Loan Category Configuration***, you can configure your internal limits that can assist members with allowing overpayments, within limits, as they prepare for vacations, large purchases, or other needs.

These limits are set at the category-level and are applicable only for credit card loans when the member initiates a non-scheduled transfer via Online Banking or ARU. If a member initiates a transfer to their credit card that surpasses the configured limit, the payment will fail to post, and the member will receive an error message.

We anticipate this feature will also be beneficial for mitigating fraud by preventing excessive overpayments above your credit union's approved disbursement limit.

New Address Fields in Debit/Credit Card Ordering Screens (that you can edit!)

Learn more: online help

We know our members are movers and shakers, and sometimes a plastic needs to be delivered to an address that isn't the member's permanent or temporary address. This enhancement adds new fields to the debit and credit card order screens that allow your EFT team to manually update the address on screen for the card order only! The address is displayed on screen from either the current or alternate address (whichever is active at the time of the card order) and open to edit as needed.

This means, no more changing the member's address, ordering a card, then changing it back after maintenance is sent for the day. The address on the order screen is only used during the order and gets sent to the vendor with the card order.

New Architecture Now Supports Growth with Third-Party Account-to-Account (A2A) Transfer Vendor Relationships

Learn more about upcoming the third party A2A solution, Payrailz in The Kitchen

With this release we are proud to introduce our implementation of the tools needed to support third-party A2A integrations with vendors (such as Payrailz). Now your credit union has options for your A2A provider, just as you currently have with bill pay and/or P2P providers.

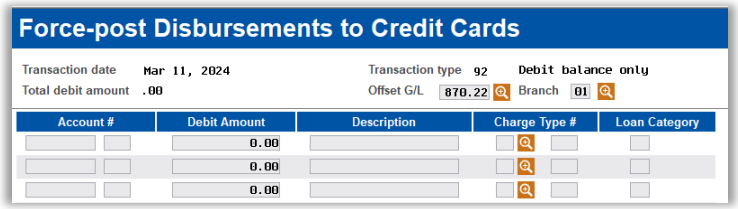
Six new tools have been added to CU*BASE to support this new initiative. These tools follow a similar hierarchy as bill pay and P2P (person to person) vendors.

- **Tool #1943** ***Master 3rd Party A2A Vendor Prdct Config*** (view via Tool #1948)
  - For global vendor configurations.
- **Tool #1944** ***CU 3rd Party A2A Vendor Product Config*** (view via Tool #1947)
  - To configure your credit union vendor.
- **Tool #1945** ***3rd Party A2A Mrkt Msg and Fees Config*** (view via Tool #1946)
  - To configure fees and marketing messages for members.

Force Post Credit Card Exception Transactions with this New Adjustment Tool

Learn more: online help

Thank you for Diversified Members Credit Union for the suggestion!



No longer will you need to take the risk of manually adjusting a disbursement limit to post a credit card transaction to a frozen or overlimit loan. In this release comes the **new** **Tool #1041** ***Force Post Disbursements to Credit Cards***, allowing authorized staff the ability to post transactions that would otherwise be exceptions, as well as applying any necessary overrides (such as for frozen accounts), all within the same tool.

Accounting/Back Office

New Corporate Checks Reconciliation Tool

Learn more: online help

If you've wanted an easy-access hub for corporate check reconciliation information, we are unveiling a new tool to scratch that itch.

We've created a new dashboard that consolidates information from your Check Register report and G/L accounts to supplement the corporate check/money order reconciliation process. Now you can easily view your EOD G/L and outstanding checks balances in one central place. View this dashboard via the new **Tool #1048** ***Corporate Check Reconciliation Dashboard***.

Note: This new tool does not replace your existing processes but functions as a supplement. It does not replace any reconciliation actions requiring the PCKRXX report.

Enhancements to A2A Reports

Learn more: online help

We've enhanced the daily A2A Exception Report to include more exceptions that prevented an A2A transfer from posting. In addition to existing failed transfers rejected by Magic-Wrighter, you will now see transfers with a posting date of the current or prior business date and a "S - sent" status but no vendor confirmation, which can occur if there is a communication error.

We are also adding an *Other/Investigation Required* section to prevent valuable information from falling through the cracks. This section will display records posted on the prior business date with an "A - active" status and records posted on the current or prior business date with a status of "X – Stand-In".

We've also created a new daily report listing successfully posted ("C – Confirmed" status) A2A transactions whose posting date is the current date. This report, A2A Transfers Daily Posting Report (LMBRA2ACP), is broken down by incoming versus outgoing transfers and will generate during EOD processing. (It is not based on any Magic-Wrighter cut-off times.) We hope this new report will be a first step towards helping you analyze your A2A traffic more thoroughly. As you use this report, we hope you'll give us feedback that will allow us to further refine the report to meet your needs.

View-Only Tool for HSA Balance Information

Learn more: online help

To mirror the existing view-only tool for IRA information (**Tool #501** ***Member IRA Balance Inquiry***), we have created **new** **Tool #1047** ***View HSA Balance Information*** to allow staff the same functionality to view balances without the ability to maintain or make changes. We've added this to the TAX category on the CU*BASE home page to make finding and using it easier than ever.

Additional Enhancements

New View-Only VMS Online/Mobile/Text Banking Configuration

Learn more: online help

With this release we are introducing **Tool #1049** ***View Online/Mobile/Text Banking Config*** (the view-only version of Tool #569). This will allow staff to view the configurations for features like online banking, text banking, Personal Internet Branch (PIB), and more, without viewing the actual configuration screens.

Separating Audio Response Configuration (ARU) Settings from Operations Online Banking Configuration

Learn more: online help

Now you can have separate rules for your phone banking (audio response) and online/mobile banking environments. With this release we are adding OPER **Tool #5511** ***Audio Response Configuration*** with separate controls, as well as the view-only version (Tool #1098). Now you can have separate settings for features such as stop pays, Reg E., and more. *If you want a setting for one but not the other, that is now possible!* Contact a Client Services and Education representative for more details on making changes.

Enhancements to HMDA Maintenance Workflow

Learn more: online help

No need to worry about losing your data while working HMDA information; **Tool #1090** ***HMDA Maintenance*** now saves as you go!

We've removed the **Save/Update** (F5) button from the screen, simplifying and improving the screen flow. Simply click the page up/down arrows to save your data and proceed to more fields. Before exiting the tool, you'll just need to save the changes made on the final screen by clicking the forward (or page up/down) arrow. Never fear losing your HMDA data again.

Accounts Payable Notification Email Added to Back Office Configurations

Learn more: online help

To continue to comply with the Google email mandates regarding DKIM and DMARC, and our previous projects to move configurable "From" email addresses to the back-office configurations, we have removed the email address entry from **Tool #1900** ***Workflow Controls: Accounts Payable***. If you would like to change your email address to a custom domain, please review the requirements in this Knowledge Base article.

Canned Query Helps Analyze ANR/NSF Fee Income (and Potential Reversal Opportunities)

Learn more: Automated Non-Returns (ANR) and online help

Interested in learning more about your NSF/ANR fee income? Now, you can use **Tool #1051** ***NSF Transactions by Day (NSFTR)*** to access a canned Query to identify all NSF/ANR transactions that have occurred on any particular day for analysis and to evaluate fee reversals, if appropriate.

Updates to the Account Suffix Configuration Tool

Learn more: online help

With this release comes a refresh of **Tool #105** ***Account Suffix Configuration***. With the latest standards in place, this tool is more user-friendly and offers an improved workflow. The enhancement also includes a new confirmation window when changes are made to the *Description* field, helping to ensure that unintended changes cannot be made.

Standardize the GL Account Control Configuration

Learn more: online help

In this release, we have improved the functionality of **Tool #383** ***GL Account Control Configuration*** by bringing screens up to current standards, which ultimately results in an improved workflow for all users. Also new with this release are changes to the dashboard lookup screen, which now offers a new sort feature.

New ATM Terminal ID Lookup

Learn more: online help

We've added a lookup option to the ATM Terminal ID field in **Tool #754** ***Release Holds on ATM Deposits*** to assist in releasing holds using that field (no more typing it manually!)

Resequencing Change for Automated Custom Reports

Learn more: online help

We've adjusted the resequencing feature in **Tool #758** ***Report Automation – Custom Rpts/Files*** to allow the user to manually set the resequencing increment. The maximum number of reports for automation is still 999, so CU*BASE will let you know if you set a number that crosses that threshold.

End