May 2025 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.

EFT Modifications

- 65238 — Update: respond to incoming 382 online status messages for FISB/Payments One.
- 65347 — Mandate: Fiserv introduction new subbits to be added in data element for VISA and Master Card atm/debit and credit card so we do not receive any errors.

Enhancements

- 60719 — Update to 1Click Loan Offers to Include Fee When Calculating Modified APR.
- 66017 — Created stored procedure for CU*Forms to retrieve credit insurance fields for booked loans.
- 48401 — Create an API for Scheduled Transfers.
- 57952 — Add option to loan category config to prevent loan payoff via online banking.
- 59900 — Allow Dual Emboss for Individual Memberships - Debit and Credit Card Orders.
- 60888 — New Process to Populate Loan Data to HMDA Information Tool.
- 61252 — Create a process to import Mortgage Statement Mailing Audit from SAGE Direct.
- 61428 — Enhancements to Dollar Amount Search on General Ledger History Search Screen (from **Tool #60**).
- 61511 — Set up of new file export and import process with Capital Tax for NMS.
- 62057 — Activate Retailer Groups for Credit Card Cash Back Programs.
- 62060 — Activate Retailer Groups for Card Activity Rebates.
- 62592 — Create an "Edit" Function in Member Connect that doesn't require a File Name.
- 62760 — Enhance Work with Tracker Follow-ups screen to add reassign follow-ups feature.

- 62803   Create New Routine to Capture PMI and Property Tax Information for Reporting on 1098 Tax Form.
- 63090   Create a new billing process for Real Time Payments.
- 63112   Block List for ITM Services.
- 63279   New ACH On Demand Report.
- 63301   Adjustments to Mini-contract Variable Rate Loans when Introductory Rates Expire.
- 63428   OLB: Create an online banking UI for Payrailz A2A.
- 63555   Add a "Save/Done" Button on the Payment Protection and Miscellaneous Coverages Screen in **Tool #20 *Update Account Information***.
- 63692   ITM Integration Update - Allow Check Payments Over/Under Loan Payment Amount.
- 64813   Expand the AUDICC table to track MFA details when members log in to online banking.
- 65949   Screen Changes to Credit Union Master Definition screen to accommodate deploying 63655 with 25.05 BETA.
- 65060   Expand Integration Manager to Include Additional Fields to Configure Qualifile Integrations.
- 65985   Add MI Saves to monthly billing emails sent to Lender*VP.
- 66053   Add QCash & CRIF to Monthly billing emails to Lender*VP.
- 66076   Modification to J.D. Power/KBB Vehicle Valuations to Include VIN and Valuation Type.
- 66177   Change the routing to a NEW index page for Retailer Direct.

Internal Modifications

- 65174   Convert program to SQL: QFMTSRC member TDIVRB01.
- 65645   Purge old files under /FILETRANS on IFS with Month retention.

Modifications

- 65314   Move tools for scan message file from group provider library to standard CU*BASE library.
- 65531   New list job file for support team tools for researching and debugging active processes.
- 61147   Add Transfer Parameter to Max Earnings Sweep Relationship Configuration.
- 62335   Eliminate the error occurring when attempting to view a check after using the transaction type filter in account history.
- 62459   Eliminate Operation execution errors for CASS (Coding Accuracy Support System) run.

- 63681   Add the word Xtend in **Tool #31 *Reversing a Transaction*** to state Xtend shared branch member vs. Shared branch member.
- 63712   A2A account relationship screen can sometimes pull up incorrect record when selected.
- 63772   Remove the word "refinance" from **Tool #507 *Loan Extensions and Modifications***.
- 63811   Change the verbiage in master parameters to "Insured by" instead of "Insurance Logo".
- 64088   Adjustments to Two Query View Tables, adding fields and logic for closed sequence number.
- 64216   Change Default Value of "Fee Code" Field for NEW Safe Deposit Boxes within **Tool #912 *Update Safe Deposit Box Information***.
- 64705   Correct Spelling of "Identity" in CTR screen for **Tool# 991**, Item number 20.
- 64731   A2A program needs to have amounts used for limits to correctly format the information when two or more being processed on same day.
- 65468   Update expiration date program to not put unnecessary locks on debit and credit card records.
- 65636   Update Error Handling for Bill Pay SAF File Delivery.
- 66037   Screen Changes only for Proj 63501 -Enhancements to Interest Only.
- 65798   Enhance CU*Spy tax archiving to include group providers.
- 66201   Create a Retailer Direct - Success Credit Union Demo Site.
- 66276   Update Retailer Direct CSS to address reported mobile screen size issues.

Warranty Modification/Adjustment

- 66182   Correct issue where misc receipt records are being carried over to subsequent transactions creating incorrect postings primarily during funds forward transactions.
- 64598   Adjustment to receipt suffixes when hidden base shares on.
- 62470   BSA could combine an organization transaction with an individuals if the Tin is the same as a Social security number.
- 63946   Correct **Tool #643 *Print Fed ACH Transmission Summary*** so it doesn't clear the date range selected after choosing a printer.
- 63947   Correct CFT Fee posting to the balance on a credit card loan.
- 64528   Correct where the Payable To field on the Member Escrow Disbursement Schedules Table is not updated.
- 65915   Adjustment to Lending Screens for Hidden Function Keys.

Web Modifications

- 63630   Create an SSO in OLB to QCash.
- 65989   Allow users to specify the appearance setting for their account to follow (always light mode, always dark mode, follow device setting).
- 66028   Modifications to capture user IP Address with F5 XC server in mix.
- 66255   Restore functionality of First Time User account setup workflow in **It's Me 247**.