Beta Test Checklist

Please complete and score each task and note any comments you may have regarding each task.

Credit Union Name: **Frankenmuth Credit Union**

Primary Contact Name: **Hollie Britton**

Primary Contact Phone Number: **989.497.1629**

Rate each item on a scale of 1-5.
(5 = highest, 1 = lowest)

		5	Extremely
		4	Very
		3	Somewhat
		2	Slightly
		1	Not at all
		N/A	Not applicable

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Tried in CBX and GOLD Y/N	Comments/ Explanation of Rating
	M E M B E R F A C I N G							
Sample tool	*Sample task*	Y	3	2	4	5	Y	*This feature will really make processing much easier for tellers.*
	TWO FACTOR AUTHENTICATION FOR ONLINE BANKING PASSWORD RESETS							
569	Review the changes made to the Online Banking Password and Security Settings configuration. When ready turn on "Use Two Factor" for password resets. ***Please ensure you confirm with Quality Control that your mobile apps have been properly updated to the proper version to avoid errors to users attempting to reset password through mobile app***	Y	5	5	5	5	y	
OLB(It'sMe)	Test the forgot password feature when configurations in Tool #569 are set to Use Two Factor and ensure you are successfully able to reset a password using the two-factor method.	Y	5	5	5	5	y	

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Tried in CBX and GOLD Y/N	Comments/ Explanation of Rating
72	Review the redesigned screen. Test all functionality of the screen and test resetting a user's password, security questions, and username. Test multiple combinations to ensure screens properly display the correct information.		Y	5	5	5	5	y	
1072	If you use CU*Talk, use this new tool to activate/deactivate and reset the members phone banking PIN. ***If your Credit Union wishes to use the custom PIN feature, please reach out to Quality Control to have this activated***		y	5	5	5	5	y	
ACCOUNT AGGREGATION (SEE/JUMP) FOR BIZLINK 247									
14	Enter the password reset function for an account tied to BizLink 247 online banking. Select an employee ID and use the "Aggregation/Jump Permissions" option to set up a related company ID/employee ID combination for that user to see/jump to. (Employee ID must already exist). This procedure may be repeated if multiple business memberships are related to the same owner or manager.		y	5	5	5	5	Y	8.26 – shared a screen shot with QC team to show where it says "success credit union" in the product description for the member in OLB
BizLink 247	Login to the business membership to which you have related accounts. Select an account to jump to from the Profile Menu dropdown. Verify that you are jumped to the correct membership, and that you can successfully jump back.		y	5	5	5	5	na	

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Tried in CBX and GOLD Y/N	Comments/ Explanation of Rating
BizLink 247	Login to the business membership to which you have related accounts. Select an account to jump to from the Profile Menu dropdown. Verify that you are jumped to the correct membership, and that you can successfully jump back.		y	5	5	5	5	na	
BizLink 247	Login to the business membership to which you have related accounts. Navigate to the Cross-Account Summary module. Select one of the jump links from this page and verify that you are jumped to the correct membership.		y	5	5	5	5	na	
BizLink 247	Login to the business membership to which you have related accounts. Navigate to the Cross-Account Summary module. Make sure the filter capabilities function as you would expect.		y	5	5	5	5	na	
L E N D I N G									
SCHEDULE FUTURE RATE CHANGES									
506	If you are able to change Base Loan Rates during BETA, use this tool to schedule the change in advance. Confirm that you can enter in a new Base Rate and a Rate Change Date for a fixed rate loan. Confirm that the Save/Done function presents a confirmation window, and the rate change is recorded.		y	5	5	5	5	y	

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Tried in CBX and GOLD Y/N	Comments/ Explanation of Rating
470	On the date the base rate is scheduled to change confirm that the Base Rate was changed and is accurate and any rate deviations (Online Banking, Risk Based Pricing) are also changed. Confirm that the PLNPRTU report was generated, and the Product and rate information are accurate	y	5	5	5	5	y	
REFRESH FUEL DECISIONS								
2/53	Review the Credit Report Decision Screen when working an application (New or Existing). Confirm that you are presented with the new screen, and the information is correct for the applicant. Access the Function Keys and confirm they work as expected.							**Feedback from emails with Thomas H
2/53	If you have CLR Path programs configured confirm that the 'Decision Advice' function button is present on the Credit Report Decision Screen. Select the button and confirm that you are presented the CLR Path Decision Advice window.	y						
2/53	Review the Credit Report Decision Screen for an application with a FUEL Credit pull performed AFTER the function is enabled by LenderVP. Confirm that 'Refresh This Decision' button is presented.	y						
2/53	Select 'Refresh This Decision' Confirm a confirmation window is presented- select Confirm. Review the refreshed decision. Confirm that the Decision elements are correct for the existing credit report and current application number.	y						

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Tried in CBX and GOLD Y/N	Comments/ Explanation of Rating
100	For any application with a refreshed decision - confirm via QUERY (Tool 100) that the Pull Type Number (Field CRPULL#) in the Credit Report Profile Information table (CRBSUMS) is '32'. Use the Credit Report Number (Field CRRPTNO) of the primary applicant as your selection criteria.								
159	If the Decision Code changes (ER to EP or EP to ER) due to the refreshed decision confirm that the change writes out to CUFMAINT.								
	A U D I T								
	ABNORMAL ACTIVITY MONITORING: STOP-NO-GO FOR ACH DEPOSITS								
101	Select Stop-No-Go Patterns. Verify that the preconfigured 'ACHDEPOSIT' pattern has been populated in the monitoring configuration and the initial status is inactive.								
101	Activate the 'ACHDEPOSIT' Pattern. Setup ACH deposit monitoring limits for specific membership designations and/or for all other membership designations. Use limits that best suit your member's ACH banking habits.								

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely / 4 Very / 3 Somewhat / 2 Slightly / 1 Not at all / N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Tried in CBX and GOLD Y/N	Comments/ Explanation of Rating
1875	Review/Monitor daily ACH exceptions for ABNL records. Verify them against your configured abnormal monitoring limits. Process exception records based on your credit union's outlined procedures.								
OLB(It'sMe)	If possible, verify via It'sMe that an ACH outside of configured limits is marked as unavailable for deposit.								

GENERAL COMMENTS

Beta Test Checklist

Please complete and score each task and note any comments you may have regarding each task.

Credit Union Name: **Notre Dame FCU**

Primary Contact Name: **Crystal Waggoner**

Primary Contact Phone Number: **574-400-4981**

Rate each item on a scale of 1-5.
(5 = highest, 1 = lowest)

5	Extremely
4	Very
3	Somewhat
2	Slightly
1	Not at all
N/A	Not applicable

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Tried in CBX and GOLD Y/N	Comments/ Explanation of Rating
	MEMBER FACING							
Sample tool	*Sample task*	Y	3	2	4	5	Y	*This feature will really make processing much easier for tellers.*
	TWO FACTOR AUTHENTICATION FOR ONLINE BANKING PASSWORD RESETS							
569	Review the changes made to the Online Banking Password and Security Settings configuration. When ready turn on "Use Two Factor" for password resets. ***Please ensure you confirm with Quality Control that your mobile apps have been properly updated to the proper version to avoid errors to users attempting to reset password through mobile app***	N						Our settings for #of hours before first-time password/password reset expires is set at 24. However when we rest the password we get a message that the password is good for three days. Reset a password yesterday and we received a message that member will have until 9/16/2025 at approximately 12:00 to reset. However after 24 hours they receive a message the password has expired.
OLB(It'sMe)	Test the forgot password feature when configurations in Tool #569 are set to Use Two Factor and ensure you are successfully able to reset a password using the two-factor method.	N						We have not turned this on as our intent for the Beta testing was only for BizLink 247

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Tried in CBX and GOLD Y/N	Comments/ Explanation of Rating
72	Review the redesigned screen. Test all functionality of the screen and test resetting a user's password, security questions, and username. Test multiple combinations to ensure screens properly display the correct information.	Y	5	5	5	5	5	Our settings for #of hours before first-time password/password reset expires is set at 24. However when we rest the password we get a message that the password is good for three days. Reset a password yesterday and we received a message that member will have until 9/16/2025 at approximately 12:00 to reset. However after 24 hours they receive a message the password has expired. Partner feedback was they like the reset/delete option s all in one place.
1072	If you use CU*Talk, use this new tool to activate/deactivate and reset the members phone banking PIN. ***If your Credit Union wishes to use the custom PIN feature, please reach out to Quality Control to have this activated***	N						We have not turned this on as our intent for the Beta testing was only for BizLink 247
	ACCOUNT AGGREGATION (SEE/JUMP) FOR BIZLINK 247							
14	Enter the password reset function for an account tied to BizLink 247 online banking. Select an employee ID and use the "Aggregation/Jump Permissions" option to set up a related company ID/employee ID combination for that user to see/jump to. (Employee ID must already exist). This procedure may be repeated if multiple business memberships are related to the same owner or manager.	Y						We have one member testing the jump feature right now and they love it. They are very happy with the upgrade. We hope to have more members using it in the next couple of weeks.

Rate each item on a scale of 1-5.
(5 = highest, 1 = lowest)
5 Extremely
4 Very
3 Somewhat
2 Slightly
1 Not at all
N/A Not applicable

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Tried in CBX and GOLD Y/N	Comments/ Explanation of Rating
BizLink 247	Login to the business membership to which you have related accounts. Select an account to jump to from the Profile Menu dropdown. Verify that you are jumped to the correct membership, and that you can successfully jump back.		Y						We have one member testing the jump feature right now and they love it. They are very happy with the upgrade. We hope to have more members using it in the next couple of weeks.
BizLink 247	Login to the business membership to which you have related accounts. Select an account to jump to from the Profile Menu dropdown. Verify that you are jumped to the correct membership, and that you can successfully jump back.		Y						We have one member testing the jump feature right now and they love it. They are very happy with the upgrade. We hope to have more members using it in the next couple of weeks.
BizLink 247	Login to the business membership to which you have related accounts. Navigate to the Cross-Account Summary module. Select one of the jump links from this page and verify that you are jumped to the correct membership.		Y						We have one member testing the jump feature right now and they love it. They are very happy with the upgrade. We hope to have more members using it in the next couple of weeks.
BizLink 247	Login to the business membership to which you have related accounts. Navigate to the Cross-Account Summary module. Make sure the filter capabilities function as you would expect.		Y						We have one member testing the jump feature right now and they love it. They are very happy with the upgrade. We hope to have more members using it in the next couple of weeks.
LENDING									

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Tried in CBX and GOLD Y/N	Comments/ Explanation of Rating
				SCHEDULE FUTURE RATE CHANGES				
506	If you are able to change Base Loan Rates during BETA, use this tool to schedule the change in advance. Confirm that you can enter in a new Base Rate and a Rate Change Date for a fixed rate loan. Confirm that the Save/Done function presents a confirmation window, and the rate change is recorded.	N						We have not turned this on as our intent for the Beta testing was only for BizLink 247
470	On the date the base rate is scheduled to change confirm that the Base Rate was changed and is accurate and any rate deviations (Online Banking, Risk Based Pricing) are also changed. Confirm that the PLNPRTU report was generated, and the Product and rate information are accurate	N						We have not turned this on as our intent for the Beta testing was only for BizLink 247
				REFRESH FUEL DECISIONS				
2/53	Review the Credit Report Decision Screen when working an application (New or Existing). Confirm that you are presented with the new screen, and the information is correct for the applicant. Access the Function Keys and confirm they work as expected.	N						We have not turned this on as our intent for the Beta testing was only for BizLink 247
2/53	If you have CLR Path programs configured confirm that the 'Decision Advice' function button is present on the Credit Report Decision Screen. Select the button and confirm that you are presented the CLR Path Decision Advice window.	N						We have not turned this on as our intent for the Beta testing was only for BizLink 247

Rate each item on a scale of 1-5.
(5 = highest, 1 = lowest)
5 Extremely
4 Very
3 Somewhat
2 Slightly
1 Not at all
N/A Not applicable

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Tried in CBX and GOLD Y/N	Comments/ Explanation of Rating
	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable							
2/53	Review the Credit Report Decision Screen for an application with a FUEL Credit pull performed AFTER the function is enabled by LenderVP. Confirm that 'Refresh This Decision' button is presented.	N						We have not turned this on as our intent for the Beta testing was only for BizLink 247
2/53	Select 'Refresh This Decision' Confirm a confirmation window is presented- select Confirm. Review the refreshed decision. Confirm that the Decision elements are correct for the existing credit report and current application number.	N						We have not turned this on as our intent for the Beta testing was only for BizLink 247
100	For any application with a refreshed decision - confirm via QUERY (Tool 100) that the Pull Type Number (Field CRPULL#) in the Credit Report Profile Information table (CRBSUMS) is '32'. Use the Credit Report Number (Field CRRPTNO) of the primary applicant as your selection criteria.	N						We have not turned this on as our intent for the Beta testing was only for BizLink 247
159	If the Decision Code changes (ER to EP or EP to ER) due to the refreshed decision confirm that the change writes out to CUFMAINT.	N						We have not turned this on as our intent for the Beta testing was only for BizLink 247

A U D I T
ABNORMAL ACTIVITY MONITORING: STOP-NO-GO FOR ACH DEPOSITS

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Tried in CBX and GOLD Y/N	Comments/ Explanation of Rating
	Rate each item on a scale of 1-5. **(5 = highest, 1 = lowest)** 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable							
101	Select Stop-No-Go Patterns. Verify that the preconfigured 'ACHDEPOSIT' pattern has been populated in the monitoring configuration and the initial status is inactive.	N						We have not turned this on as our intent for the Beta testing was only for BizLink 247
101	Activate the 'ACHDEPOSIT' Pattern. Setup ACH deposit monitoring limits for specific membership designations and/or for all other membership designations. Use limits that best suit your member's ACH banking habits.	N						We have not turned this on as our intent for the Beta testing was only for BizLink 247
1875	Review/Monitor daily ACH exceptions for ABNL records. Verify them against your configured abnormal monitoring limits. Process exception records based on your credit union's outlined procedures.	N						We have not turned this on as our intent for the Beta testing was only for BizLink 247
OLB(It'sMe)	If possible, verify via It'sMe that an ACH outside of configured limits is marked as unavailable for deposit.	N						We have not turned this on as our intent for the Beta testing was only for BizLink 247
G E N E R A L C O M M E N T S								

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Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Tried in CBX and GOLD Y/N	Comments/ Explanation of Rating

Beta Test Checklist

Please complete and score each task and note any comments you may have regarding each task.

Credit Union Name: Route 31 Federal Credit Union

Primary Contact Name: Melissa Adams

Primary Contact Phone Number: 231-246-7282

Rate each item on a scale of 1-5.
(5 = highest, 1 = lowest)

5	Extremely
4	Very
3	Somewhat
2	Slightly
1	Not at all
N/A	Not applicable

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Tried in CBX and GOLD Y/N	Comments/ Explanation of Rating
MEMBER FACING								
Sample tool	*Sample task*	Y	3	2	4	5	Y	*This feature will really make processing much easier for tellers.*
TWO FACTOR AUTHENTICATION FOR ONLINE BANKING PASSWORD RESETS								
569	Review the changes made to the Online Banking Password and Security Settings configuration. When ready turn on "Use Two Factor" for password resets. ***Please ensure you confirm with Quality Control that your mobile apps have been properly updated to the proper version to avoid errors to users attempting to reset password through mobile app***	N						Not using
OLB(It'sMe)	Test the forgot password feature when configurations in Tool #569 are set to Use Two Factor and ensure you are successfully able to reset a password using the two-factor method.	N						Not using

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Tried in CBX and GOLD Y/N	Comments/ Explanation of Rating
72	Review the redesigned screen. Test all functionality of the screen and test resetting a user's password, security questions, and username. Test multiple combinations to ensure screens properly display the correct information.		N						Not using
1072	If you use CU*Talk, use this new tool to activate/deactivate and reset the members phone banking PIN. ***If your Credit Union wishes to use the custom PIN feature, please reach out to Quality Control to have this activated***		Y	5	5	1	5	Y	The staff do not like going to a separate tool to reset a CU*Talk PIN. I showed them how to use it but still like it better in tool #14 with the online banking reset. We will use it after the beta test is over.
ACCOUNT AGGREGATION (SEE/JUMP) FOR BIZLINK 247									
14	Enter the password reset function for an account tied to BizLink 247 online banking. Select an employee ID and use the "Aggregation/Jump Permissions" option to set up a related company ID/employee ID combination for that user to see/jump to. (Employee ID must already exist). This procedure may be repeated if multiple business memberships are related to the same owner or manager.		Y	5	5	5	2	Y	Both our business development officer and I have set up at least one member with this feature. It works great. Not sure how often this will be used after beta. Business member's typically have one membership for their business and one for their personal. They wanted the ability for see/jump to and from their personal accounts.
BizLink 247	Login to the business membership to which you have related accounts. Select an account to jump to from the Profile Menu dropdown. Verify that you are jumped to the correct membership, and that you can successfully jump back.		N						We do not have any accounts that can be linked internally as they do not have users listed.

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Tried in CBX and GOLD Y/N	Comments/ Explanation of Rating
BizLink 247	Login to the business membership to which you have related accounts. Select an account to jump to from the Profile Menu dropdown. Verify that you are jumped to the correct membership, and that you can successfully jump back.		N						
BizLink 247	Login to the business membership to which you have related accounts. Navigate to the Cross-Account Summary module. Select one of the jump links from this page and verify that you are jumped to the correct membership.		N						
BizLink 247	Login to the business membership to which you have related accounts. Navigate to the Cross-Account Summary module. Make sure the filter capabilities function as you would expect.		N						
L E N D I N G									
SCHEDULE FUTURE RATE CHANGES									
506	If you are able to change Base Loan Rates during BETA, use this tool to schedule the change in advance. Confirm that you can enter in a new Base Rate and a Rate Change Date for a fixed rate loan. Confirm that the Save/Done function presents a confirmation window, and the rate change is recorded.		N						Not using

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely / 4 Very / 3 Somewhat / 2 Slightly / 1 Not at all / N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Tried in CBX and GOLD Y/N	Comments/ Explanation of Rating
470	On the date the base rate is scheduled to change confirm that the Base Rate was changed and is accurate and any rate deviations (Online Banking, Risk Based Pricing) are also changed. Confirm that the PLNPRTU report was generated, and the Product and rate information are accurate		N						Not using
		REFRESH FUEL DECISIONS							
2/53	Review the Credit Report Decision Screen when working an application (New or Existing). Confirm that you are presented with the new screen, and the information is correct for the applicant. Access the Function Keys and confirm they work as expected.		N						Have FUEL but have not gone live yet
2/53	If you have CLR Path programs configured confirm that the 'Decision Advice' function button is present on the Credit Report Decision Screen. Select the button and confirm that you are presented the CLR Path Decision Advice window.		N						Have FUEL but have not gone live yet
2/53	Review the Credit Report Decision Screen for an application with a FUEL Credit pull performed AFTER the function is enabled by LenderVP. Confirm that 'Refresh This Decision' button is presented.		N						Have FUEL but have not gone live yet
2/53	Select 'Refresh This Decision' Confirm a confirmation window is presented- select Confirm. Review the refreshed decision. Confirm that the Decision elements are correct for the existing credit report and current application number.		N						Have FUEL but have not gone live yet

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely / 4 Very / 3 Somewhat / 2 Slightly / 1 Not at all / N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Tried in CBX and GOLD Y/N	Comments/ Explanation of Rating
100	For any application with a refreshed decision - confirm via QUERY (Tool 100) that the Pull Type Number (Field CRPULL#) in the Credit Report Profile Information table (CRBSUMS) is '32'. Use the Credit Report Number (Field CRRPTNO) of the primary applicant as your selection criteria.		N						Have FUEL but have not gone live yet
159	If the Decision Code changes (ER to EP or EP to ER) due to the refreshed decision confirm that the change writes out to CUFMAINT.		N						Have FUEL but have not gone live yet
AUDIT									
ABNORMAL ACTIVITY MONITORING: STOP-NO-GO FOR ACH DEPOSITS									
101	Select Stop-No-Go Patterns. Verify that the preconfigured 'ACHDEPOSIT' pattern has been populated in the monitoring configuration and the initial status is inactive.		N						Not using
101	Activate the 'ACHDEPOSIT' Pattern. Setup ACH deposit monitoring limits for specific membership designations and/or for all other membership designations. Use limits that best suit your member's ACH banking habits.		N						Not using

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Tried in CBX and GOLD Y/N	Comments/ Explanation of Rating
1875	Review/Monitor daily ACH exceptions for ABNL records. Verify them against your configured abnormal monitoring limits. Process exception records based on your credit union's outlined procedures.		N						Not using
OLB(It'sMe)	If possible, verify via It'sMe that an ACH outside of configured limits is marked as unavailable for deposit.		N						Not using
	GENERAL COMMENTS								
	BizLink 247 – since we do not have accounts that can be linked to test internally, we have set up 2 members with the feature. Our business development officer is reaching out to them to find out how the see/jump function worked for them. He is also going to get their feed back.								

Beta Test Checklist

Please complete and score each task and note any comments you may have regarding each task.

Credit Union Name: **Thornapple Credit Union**

Primary Contact Name: **Courtney Stonehouse**

Primary Contact Phone Number: **2699488369**

Rate each item on a scale of 1-5.
(5 = highest, 1 = lowest)

5	Extremely
4	Very
3	Somewhat
2	Slightly
1	Not at all
N/A	Not applicable

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Tried in CBX and GOLD Y/N	Comments/ Explanation of Rating
	M E M B E R F A C I N G							
Sample tool	*Sample task*	Y	3	2	4	5	Y	*This feature will really make processing much easier for tellers.*
	TWO FACTOR AUTHENTICATION FOR ONLINE BANKING PASSWORD RESETS							
569	Review the changes made to the Online Banking Password and Security Settings configuration. When ready turn on "Use Two Factor" for password resets. ***Please ensure you confirm with Quality Control that your mobile apps have been properly updated to the proper version to avoid errors to users attempting to reset password through mobile app***	Y	5	3	3	3	N	CBX is where I did it as we are primarily using CBX. I haven't noticed a difference with our membership
OLB(It'sMe)	Test the forgot password feature when configurations in Tool #569 are set to Use Two Factor and ensure you are successfully able to reset a password using the two-factor method.	N						

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Tried in CBX and GOLD Y/N	Comments/ Explanation of Rating
72	Review the redesigned screen. Test all functionality of the screen and test resetting a user's password, security questions, and username. Test multiple combinations to ensure screens properly display the correct information.	Y	4	2	2	4	N	Again we primary use CBX.
1072	If you use CU*Talk, use this new tool to activate/deactivate and reset the members phone banking PIN. ***If your Credit Union wishes to use the custom PIN feature, please reach out to Quality Control to have this activated***	N	1	1	1	1	N	I did reach out and last time I did I was told it was still not working. I tried in CBX and Gold.
	ACCOUNT AGGREGATION (SEE/JUMP) FOR BIZLINK 247							
14	Enter the password reset function for an account tied to BizLink 247 online banking. Select an employee ID and use the "Aggregation/Jump Permissions" option to set up a related company ID/employee ID combination for that user to see/jump to. (Employee ID must already exist). This procedure may be repeated if multiple business memberships are related to the same owner or manager.	N						We do not have Biz Link
BizLink 247	Login to the business membership to which you have related accounts. Select an account to jump to from the Profile Menu dropdown. Verify that you are jumped to the correct membership, and that you can successfully jump back.	N						We do not have Biz Link

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Tried in CBX and GOLD Y/N	Comments/ Explanation of Rating
BizLink 247	Login to the business membership to which you have related accounts. Select an account to jump to from the Profile Menu dropdown. Verify that you are jumped to the correct membership, and that you can successfully jump back.	N						We do not have Biz Link
BizLink 247	Login to the business membership to which you have related accounts. Navigate to the Cross-Account Summary module. Select one of the jump links from this page and verify that you are jumped to the correct membership.	N						We do not have Biz Link
BizLink 247	Login to the business membership to which you have related accounts. Navigate to the Cross-Account Summary module. Make sure the filter capabilities function as you would expect.	N						We do not have Biz Link
L E N D I N G								
SCHEDULE FUTURE RATE CHANGES								
506	If you are able to change Base Loan Rates during BETA, use this tool to schedule the change in advance. Confirm that you can enter in a new Base Rate and a Rate Change Date for a fixed rate loan. Confirm that the Save/Done function presents a confirmation window, and the rate change is recorded.	N						We are not testing this

Rate each item on a scale of 1-5.
(5 = highest, 1 = lowest)

5	Extremely
4	Very
3	Somewhat
2	Slightly
1	Not at all
N/A	Not applicable

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest) 5 Extremely 4 Very 3 Somewhat 2 Slightly 1 Not at all N/A Not applicable	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Tried in CBX and GOLD Y/N	Comments/ Explanation of Rating
470	On the date the base rate is scheduled to change confirm that the Base Rate was changed and is accurate and any rate deviations (Online Banking, Risk Based Pricing) are also changed. Confirm that the PLNPRTU report was generated, and the Product and rate information are accurate	N						We are not testing this
	REFRESH FUEL DECISIONS								
2/53	Review the Credit Report Decision Screen when working an application (New or Existing). Confirm that you are presented with the new screen, and the information is correct for the applicant. Access the Function Keys and confirm they work as expected.	N						We do not use fuel decisions
2/53	If you have CLR Path programs configured confirm that the 'Decision Advice' function button is present on the Credit Report Decision Screen. Select the button and confirm that you are presented the CLR Path Decision Advice window.	N						We do not use fuel decisions
2/53	Review the Credit Report Decision Screen for an application with a FUEL Credit pull performed AFTER the function is enabled by LenderVP. Confirm that 'Refresh This Decision' button is presented.	N						We do not use fuel decisions
2/53	Select 'Refresh This Decision' Confirm a confirmation window is presented- select Confirm. Review the refreshed decision. Confirm that the Decision elements are correct for the existing credit report and current application number.	N						We do not use fuel decisions

Tool	Task	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Tried in CBX and GOLD Y/N	Comments/ Explanation of Rating
100	For any application with a refreshed decision - confirm via QUERY (Tool 100) that the Pull Type Number (Field CRPULL#) in the Credit Report Profile Information table (CRBSUMS) is '32'. Use the Credit Report Number (Field CRRPTNO) of the primary applicant as your selection criteria.	N						We do not use fuel decisions
159	If the Decision Code changes (ER to EP or EP to ER) due to the refreshed decision confirm that the change writes out to CUFMAINT.	N						We do not use fuel decisions
A U D I T								
ABNORMAL ACTIVITY MONITORING: STOP-NO-GO FOR ACH DEPOSITS								
101	Select Stop-No-Go Patterns. Verify that the preconfigured 'ACHDEPOSIT' pattern has been populated in the monitoring configuration and the initial status is inactive.							
101	Activate the 'ACHDEPOSIT' Pattern. Setup ACH deposit monitoring limits for specific membership designations and/or for all other membership designations. Use limits that best suit your member's ACH banking habits.							

Rate each item on a scale of 1-5.
(5 = highest, 1 = lowest)

5	Extremely
4	Very
3	Somewhat
2	Slightly
1	Not at all
N/A	Not applicable

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest)	Did you complete the task? Y/N	How easy was the task? 1-5	Are you satisfied with the results you received? 1-5	How helpful will the task be to staff? 1-5	How likely are you to perform the task after beta? 1-5	Tried in CBX and GOLD Y/N	Comments/ Explanation of Rating
1875	Review/Monitor daily ACH exceptions for ABNL records. Verify them against your configured abnormal monitoring limits. Process exception records based on your credit union's outlined procedures.								
OLB(It'sMe)	If possible, verify via It'sMe that an ACH outside of configured limits is marked as unavailable for deposit.								

Rate each item on a scale of 1-5.
(5 = highest, 1 = lowest)
5   Extremely
4   Very
3   Somewhat
2   Slightly
1   Not at all
N/A   Not applicable

G E N E R A L   C O M M E N T S