

Beta Test Checklist

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



Credit Union Name: Bridge Credit Union

Primary Contact Name: Danielle O'Connor

Primary Contact Phone Number: [REDACTED]

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

Comments/
Explanation of Rating

MEMBER FACING							
Tool	Task	Did you complete the task?	How easy was the task?	Are you satisfied with the results you received?	How helpful will the task be to staff?	How likely are you to perform the task after beta?	Comments/Explanation of Rating
<i>Sample tool</i>	<i>Sample task</i>	Y	3	2	4	5	<i>This feature will really make processing much easier for tellers.</i>
Tool 777	Choose a DIVAPL with Qualified Dividends, then choose Qualified Dividends on the bottom. Select the option to Require RDC Enrollment.	Y	5	5	N/A	3	Our Credit Union is all about Bridge Difference; so, allowing members to include RDC in their qualified dividends is on our list. The setting up was easy, understandable and I loved the report after that allowed me to see if the members would qualify, etc. Just another way to provide Bridge Difference for our members with services. When testing it out, I provided some details to Nicholas about items that needed corrected. 1) Pop-Up Comment missing some detail. 2) Option Drop-Down not obtaining any information as well.

Rate each item on a scale of 1-5.

(5 = highest, 1 = lowest)

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1 Not at all

N/A Not applicable

Did you complete the task?

How easy was the task?

Are you satisfied with the results you received?

How helpful will the task be to staff?

How likely are you to perform the task after beta?

Comments/
Explanation of Rating

Tool

Task

Y/N

1-5

1-5

1-5

1-5

Tool 569	1) Verify that the temporary password only allows for B = Birth year & first two letters of last name. 2) Verify Minimum length of password is 8-10 characters.	Y	5	5	N/A	5	Very easy to do; verified
Tool 14 / It's Me 247	If possible, reset some employee online banking passwords and verify the temporary password resets according to the new configuration	Y	5	5	5	5	Normal process; simple for staff to do and follow.
L E N D I N G							
Tool 2	While working on a loan application, use the new Print Forms button to access CU*Forms. Confirm CU*Forms launches in a new webpage and displays the loan application number you are working with.	Y	5	5	5	5	Team likes the ability to push forward directly to where we need to be..
Tool 2	While working on a loan application, use the new Go to Underwriting button to access CU*Forms. Confirm CU*Forms launches in a new webpage and displays the underwriting information for the loan application you are working with.	Y	5	5	5	5	
Tool 2	While working on a loan application, use the new Go to FormFLOW button to access CU*Forms. Confirm CU*Forms launches in a new webpage and displays the FormFLOW section for the loan application you are working with.	Y	5	5	5	5	

Rate each item on a scale of 1-5.

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How helpful will the task be to staff?

How likely are you to perform the task after beta?

Comments/
Explanation of Rating

Tool

Task

Y/N

1-5

1-5

1-5

1-5

Tool	Task	Did you complete the task?	How easy was the task?	Are you satisfied with the results you received?	How helpful will the task be to staff?	How likely are you to perform the task after beta?	Comments/ Explanation of Rating
		Y/N	1-5	1-5	1-5	1-5	
Tool 2	While working on a loan application, use the new Work with Mortgage Forms button. Confirm the Imaging Teams store page for Mortgage Forms launches in a new webpage.	Y					Will be discussing this ore as a team after the beta and other projects on our list.
Tool 2	While working on a loan application, use the new CU*Chat button. Confirm the LenderVP Team store page for CU*Chat launches in a new webpage.	Y			5	3	Will be discussing this ore as a team after the beta and other projects on our list. We are excited to see more and what opportunities this new chat would allow to work through.
Tool 1340 / 1045	Access the tool and confirm that the new field expiration date is present on the screen	Y			5	5	Bridge is super stoked about the expiration date for 1Click. We are currently working through one launch after release. This will be very helpful with extending our Holiday 1Click in November.
Tool 1340 / 1045	If you will be creating a Traditional funded or unfunded 1Click offer during the Beta Period confirm that you are able to set the expiration date to any time from 1 to 365 days after the offer creation date.						Bridge did not set up a 1Click offer this time – but we are super geeked about this! We will be hopefully sending out one after the release.
Tool 1340 / 1045	If you will be creating a Traditional funded or unfunded 1Click offer during the Beta Period confirm that you have no issues navigating through the fields/panels and that the 1Click offers are created as expected						Bridge did not set up a 1Click offer this time – but we are super geeked about this! We will be hopefully sending out one after the release.
Tool 1340 / 1045	Confirm that members can accept/decline offers in Its Me 247 created before or during the Beta period						Bridge did not set up a 1Click offer this time – but we are super geeked about this! We will be hopefully sending out one after the

Tool

Task

Rate each item on a scale of 1-5.

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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

Comments/ Explanation of Rating

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	Comments/ Explanation of Rating
Tool 1110	If you will be offering a Relationship 1Click, select an existing CLRPath model for use with the offer or create a model where only your targeted testing group would qualify- For example only members of a specific Insider/Employee Type	Y	5				Not sure if we will use this in the future yet, but on our list of projects to review and spec out for the bridge difference.
CU Publisher	Link to 'My Offers' module will need to be activated in CU Publisher. If you need assistance with enabling the feature, please reach out to us at Qualitycontrolteam@cuanswers.com	Y	5	5	5	5	
Tool 1061/1062	Relationship 1Click offers Configure and View – are new tools. Your security officer will need to grant you access.	Y	5	5	5	3	Bridge just started using Relationship inside of CBX in the last year. We are excited to see this feature
Tool 1061	Use this tool to create a Relationship 1Click offer Confirm that you can set the offer active range Confirm that initial Score Range starts at the minimum score to	Y	5	5	5	3	Bridge used a test clr with employee's accounts. However, we did not fund an account. The process was very simple.
Tool 1061	Enter Score Ranges and Maximum Dollar amounts as applicable Confirm score range ends at a score of 999	Y	5	5	5	3	Bridge used a test clr with employee's accounts. However, we did not fund an account. The process was very simple.
Tool 1061	Confirm that you have no issues navigating through the fields and panels involved with creating the Relationship offer	Y	5	5	5	3	Bridge used a test clr with employee's accounts. However, we did not fund an account. The process was very simple.
It's Me 247	Log into Its Me 247 – Qualified for Relationship Offer Select My Offers – confirm that module launches and offer presented Confirm offer amount is correct for the CLR Path Score/Score Range Confirm able to select a lower loan amount. Complete the 1Click process confirm loan created and all documents and records reflect the requested loan amount	Y	5	5	5	3	Bridge used a test clr with employee's accounts. However, we did not fund an account. The process was very simple.
It's Me 247	Log into Its Me 247 – Not Qualified for Relationship Offer Select My Offers – confirm that module launches and no Relationship offer is presented	Y	5	5	5	5	Bridge used a test clr with employee's accounts. However, we did not fund an account. The process was very simple.

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How likely are you to perform the task after beta?
1-5

Comments/
Explanation of Rating

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	Comments/ Explanation of Rating
It's Me 247	Confirm Traditional 1Click offers are presented via Banner and in My Offers module	Y	5	5	5	3	Bridge used a test clr with employee's accounts. However, we did not fund an account. The process was very simple.
Tool 2	Follow procedures for marking 1Click offers Completed. Confirm no issues.	Y	5	5	5	3	Bridge used a test clr with employee's accounts. However, we did not fund an account. The process was very simple.
T E L L E R / M E M B E R S E R V I C E							
Tool 1	Deposit some outside checks. Use the lookup to change the number of hold days using one of the new exception check hold reasons. Confirm the correct number of hold days is applied. Verify the receipt shows the hold reason. Verify the number of hold days calculated is correct and applied to the account.						N/A; Bridge will not be using this feature.
F2 – Phone Operator	Perform a funds transfer on a members account from one account type to another. Use the account type lookup. Verify all accounts that you can transfer to are shown. Make sure the transfer occurs and updates the members balance correctly. Verify the receipt is correct.	Y	5	5	5	5	AMAZING! Contact Center loves this feature!
F2 – Phone Operator	Perform a funds transfer from one members account to another. Use the global search to locate the second account. Use the account type lookup when selecting the suffix and verify the transaction occurs correctly. Verify the receipt is correct.	Y	5	5	5	5	

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Tool

Task

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How easy was the task?
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Are you satisfied with the results you received?
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How helpful will the task be to staff?
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How likely are you to perform the task after beta?
1-5

**Comments/
Explanation of Rating**

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	Comments/ Explanation of Rating
F2 – Phone Operator	If possible, perform a funds transfer using at least one HSA or IRA account type. Verify the transaction updates the member balance correctly. Verify that the members IRA or HSA account balance is updated correctly. Verify the receipt is correct.	Y	5	5	5	5	
Tool 516	Perform a funds transfer using tool 516. Use the global search and account type lookup when selecting account and type. Verify that all account types you should be able to transfer to/from are shown. After the transfer, verify the members account balance. If possible, repeat this process with an IRA and/or HSA account type. Double check the members IRA/HSA balance after the transaction. Check the receipt for accuracy.	Y	5	5	5	5	
Tool 354	If possible, perform an effective dated account transfer. Use the global search and account type lookup when selecting account and type. Verify that all account types you should be able to transfer to/from are shown. After the transfer, verify the members account balance.	Y	5	5	5	2	At this moment, we don't see a use for the effective dated transfer tool. But keeping it on our list to review in the future.
Tool 355	Setup some new electronic deposit holds configurations for exception holds. Use the teller outside checks section to configure the hold days.						N/A; Bridge did not test this feature

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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

Comments/
Explanation of Rating

Tool

Task

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	Comments/ Explanation of Rating
Tool 849	Activate the new check hold exception reasons. Hit Save/Update. Add some exception check holds.						N/A, Bridge did not test this feature.
Tool 1600	Deposit some outside checks. Use the lookup to change the number of hold days using one of the new exception check hold reasons. Confirm the correct number of hold days is applied. Verify the receipt shows the hold reason. Verify the number of hold days calculated is correct and applied to the account.						N/A, Bridge did not test this feature.
Tool 919	After applying a hold using teller, verify the uncollected funds screen shows the correct check hold exception reason.						N/A, Bridge did not test this feature.
Tool 20	If applicable, flag a secondary name as Power of Attorney. Verify the new POA designation is shown on the account using Inquiry and selecting secondary names.	Y	5	5	5	5	The feature was easy to set up and use. Will be a helpful tool for MSR's when talking with the members or others on the account.
Tool 20	Verify the last maintenance date updates (or date added is created) when adding or making changes to the secondary name on a members account.	Y	5	5	5	5	

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Are you satisfied with the results you received?

How helpful will the task be to staff?

How likely are you to perform the task after beta?

**Comments/
Explanation of Rating**

Tool

Task

Y/N

1-5

1-5

1-5

1-5

Tool	Task	Did you complete the task?	How easy was the task?	Are you satisfied with the results you received?	How helpful will the task be to staff?	How likely are you to perform the task after beta?	Comments/ Explanation of Rating
Tool 20	Add comments to a secondary name on an account. Verify the comments save on the account using Inquiry and selecting secondary names.	Y	5	5	5	5	This is a super cool feature. Our team thinks will give another level of communication and personalization when speaking with the members. However, I am surprised this does not write out to maintenance – that a comment was added or deleted.
F1 - Inquiry	Verify the data on a secondary name by selecting secondary names on an account and choosing F20, contact information. Make sure the print name on correspondence and power of attorney flags are accurate. Verify the DBA name appears, if applicable. Verify the date added and maintained date are accurate (if new).	Y	5	5	5	5	
Forms	Verify secondary names are correct on any forms that have them.	Y	5	5	5	5	
M A N A G E M E N T							
Tool 558	Update 'Waive Fees if Authorized Positive' field to Y-Yes. Ensure management approves turning this option on. Turning on this feature will affect all accounts. Review NSF debit card transactions to ensure fee waivers are what is expected.						N/A – Not using this feature.

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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

Comments/
Explanation of Rating

Tool

Task

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	Comments/ Explanation of Rating
Tool 225	If possible, add one or more membership designations to the "Exception Delinquency Freeze Settings" and fill in the remainder of these settings. With daily processing, ensure accounts that are part of the selected membership designations are freezing/unfreezing/remaining unfrozen as expected.						Bridge decided to not test this feature at this time. Added it to our list to review.
Tool 707	Run the simulation report for qualified dividends to see how it would impact business.	Y	5	5	5	5	This is a report that I was unaware of until now. It will be a report that I bring up to our team to analyze how the qualified dividends are going to work for us and adjust.

GENERAL COMMENTS

This was my first time participating in a beta for a CU*Answers release, and it was a very positive experience. The process was communicated clearly from start to finish, and it was easy to report issues along the way. Our team especially enjoyed the opportunity to really dig in - identifying potential issues, share feedback, and offering their perspectives. It made the experience both productive and engaging. We're looking forward to participating in future releases and continuing to provide meaningful feedback on what works well and where improvements can be made.

Beta Test Checklist

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

Credit Union Name: Evergreen Credit Union

Primary Contact Name: Roni Kasperek

Primary Contact Phone Number: [REDACTED]



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(5 = highest, 1 = lowest)

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- 3 Somewhat
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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

**Comments/
Explanation of Rating**

MEMBER FACING							
Tool	Task	Did you complete the task?	How easy was the task?	Are you satisfied with the results you received?	How helpful will the task be to staff?	How likely are you to perform the task after beta?	Comments/Explanation of Rating
<i>Sample tool</i>	<i>Sample task</i>	Y	3	2	4	5	<i>This feature will really make processing much easier for tellers.</i>
Tool 777	Choose a DIVAPL with Qualified Dividends, then choose Qualified Dividends on the bottom. Select the option to Require RDC Enrollment.	N					RDC is not something we allow all members - we have a risk rating for enrollment
Tool 569	1) Verify that the temporary password only allows for B = Birth year & first two letters of last name. 2) Verify Minimum length of password is 8-10 characters.	Y	5	4	4	4	The temporary password feature looks fine but it is very confusing to our members (formula not easy to remember when explained verbally). Business accounts and multi-name members have confused staff as we historically have not been consistent with entering data the same way.
Tool 14 / It's Me 247	If possible, reset some employee online banking passwords and verify the temporary password resets according to the new configuration	Y	5	5		5	We will keep the new configuration - trying to train members away from sharing their SSNs
LENDING							

Rate each item on a scale of 1-5.

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Tool

Task

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How likely are you to perform the task after beta?

**Comments/
Explanation of Rating**

Y/N

1-5

1-5

1-5

1-5

Tool	Task	Did you complete the task?	How easy was the task?	Are you satisfied with the results you received?	How helpful will the task be to staff?	How likely are you to perform the task after beta?	Comments/ Explanation of Rating
		Y/N	1-5	1-5	1-5	1-5	
Tool 2	While working on a loan application, use the new Print Forms button to access CU*Forms. Confirm CU*Forms launches in a new webpage and displays the loan application number you are working with.	N					My team does not do lending so I don't have access to most of these screens
Tool 2	While working on a loan application, use the new Go to Underwriting button to access CU*Forms. Confirm CU*Forms launches in a new webpage and displays the underwriting information for the loan application you are working with.	N					
Tool 2	While working on a loan application, use the new Go to FormFLOW button to access CU*Forms. Confirm CU*Forms launches in a new webpage and displays the FormFLOW section for the loan application you are working with.	N					
Tool 2	While working on a loan application, use the new Work with Mortgage Forms button. Confirm the Imaging Teams store page for Mortgage Forms launches in a new webpage.	N					
Tool 2	While working on a loan application, use the new CU*Chat button. Confirm the LenderVP Team store page for CU*Chat launches in a new webpage.	Y	5	3	3	1	Button appears on credit report pages but does not launch/weird spot for button to be. We do not intend to activate this feature as we use an outside texting service.
Tool 1340 / 1045	Access the tool and confirm that the new field expiration date is present on the screen	Y	5	4	4	4	We run a one click at the end of the year so it will be nice to make setting it up less confusing

Rate each item on a scale of 1-5.

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Tool

Task

Y/N

1-5

1-5

1-5

1-5

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		Y/N	1-5	1-5	1-5	1-5	
Tool 1340 / 1045	If you will be creating a Traditional funded or unfunded 1Click offer during the Beta Period confirm that you are able to set the expiration date to any time from 1 to 365 days after the offer creation date.	N					We only run a 1-Click offer in November as a Member Loyalty Loan
Tool 1340 / 1045	If you will be creating a Traditional funded or unfunded 1Click offer during the Beta Period confirm that you have no issues navigating through the fields/panels and that the 1Click offers are created as expected	N					
Tool 1340 / 1045	Confirm that members can accept/decline offers in Its Me 247 created before or during the Beta period	N					
Tool 1011	If you will be offering a Relationship 1Click, select an existing CLRPath model for use with the offer or create a model where only your targeted testing group would qualify- For example only members of a specific Insider/Employee Type	N					
CU Publisher	Link to 'My Offers' module will need to be activated in CU Publisher. If you need assistance with enabling the feature, please reach out to us at Qualitycontrolteam@cuanswers.com	Y	5	4	3	4	Will most likely activate when we run offers in the winter; will be easier to direct members to who qualify. We have no offers and it accurately said "You currently have no offers available"
Tool 1061/1062	Relationship 1Click offers Configure and View – are new tools. Your security officer will need to grant you access.	N					
Tool 1061	Use this tool to create a Relationship 1Click offer Confirm that you can set the offer active range Confirm that initial Score Range starts at the minimum score to	N					
Tool 1061	Enter Score Ranges and Maximum Dollar amounts as applicable Confirm score range ends at a score of 999	N					

Rate each item on a scale of 1-5.

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Tool

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Explanation of Rating**

Y/N

1-5

1-5

1-5

1-5

Tool	Task	Did you complete the task?	How easy was the task?	Are you satisfied with the results you received?	How helpful will the task be to staff?	How likely are you to perform the task after beta?	Comments/ Explanation of Rating
		Y/N	1-5	1-5	1-5	1-5	
Tool 1061	Confirm that you have no issues navigating through the fields and panels involved with creating the Relationship offer	N					
It's Me 247	Log into Its Me 247 – Qualified for Relationship Offer Select My Offers – confirm that module launches and offer presented Confirm offer amount is correct for the CLR Path Score/Score Range Confirm able to select a lower loan amount. Complete the 1Click process confirm loan created and all documents and records reflect the requested loan amount	N					
It's Me 247	Log into Its Me 247 – Not Qualified for Relationship Offer Select My Offers – confirm that module launches and no Relationship offer is presented	N					
It's Me 247	Confirm Traditional 1Click offers are presented via Banner and in My Offers module	N					
Tool 2	Follow procedures for marking 1Click offers Completed. Confirm no issues.	N					
T E L L E R / M E M B E R S E R V I C E							
Tool 1	Deposit some outside checks. Use the lookup to change the number of hold days using one of the new exception check hold reasons. Confirm the correct number of hold days is applied. Verify the receipt shows the hold reason. Verify the number of hold days calculated is correct and applied to the account.	Y	4	4	3	1	

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Are you satisfied with the results you received?

How helpful will the task be to staff?

How likely are you to perform the task after beta?

Comments/
Explanation of Rating

Tool

Task

		Y/N	1-5	1-5	1-5	1-5	
F2 – Phone Operator	Perform a funds transfer on a members account from one account type to another. Use the account type lookup. Verify all accounts that you can transfer to are shown. Make sure the transfer occurs and updates the members balance correctly. Verify the receipt is correct.	Y	5	5	5	5	There have been no issues, tellers have not reported any missing accounts or receipt issues
F2 – Phone Operator	Perform a funds transfer from one members account to another. Use the global search to locate the second account. Use the account type lookup when selecting the suffix and verify the transaction occurs correctly. Verify the receipt is correct.	Y	5	5	5	5	
F2 – Phone Operator	If possible, perform a funds transfer using at least one HSA or IRA account type. Verify the transaction updates the member balance correctly. Verify that the members IRA or HSA account balance is updated correctly. Verify the receipt is correct.	N					We have very few IRAs
Tool 516	Perform a funds transfer using tool 516. Use the global search and account type lookup when selecting account and type. Verify that all account types you should be able to transfer to/from are shown. After the transfer, verify the members account balance. If possible, repeat this process with an IRA and/or HSA account type. Double check the members IRA/HSA balance after the transaction. Check the receipt for accuracy.	Y	5	5	3	3	We don't use this Tool in our day to day workflow

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How easy was the task?

Are you satisfied with the results you received?

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**Comments/
Explanation of Rating**

Y/N

1-5

1-5

1-5

1-5

Tool	Task	Did you complete the task?	How easy was the task?	Are you satisfied with the results you received?	How helpful will the task be to staff?	How likely are you to perform the task after beta?	Comments/ Explanation of Rating
Tool 354	If possible, perform an effective dated account transfer. Use the global search and account type lookup when selecting account and type. Verify that all account types you should be able to transfer to/from are shown. After the transfer, verify the members account balance.	N					
Tool 355	Setup some new electronic deposit holds configurations for exception holds. Use the teller outside checks section to configure the hold days.	Y	4	4	3	1	I struggled a little to figure out all of the layers, but we also currently don't use any of the check hold configurations since our holds are more relationship based.
Tool 849	Activate the new check hold exception reasons. Hit Save/Update. Add some exception check holds.	Y	4	4	3	1	I was able to activate, configure, and test the new Tools though I don't believe we will personally use them as it would require a change in our procedure.
Tool 1600	Deposit some outside checks. Use the lookup to change the number of hold days using one of the new exception check hold reasons. Confirm the correct number of hold days is applied. Verify the receipt shows the hold reason. Verify the number of hold days calculated is correct and applied to the account.	Y	4	4	3	1	
Tool 919	After applying a hold using teller, verify the uncollected funds screen shows the correct check hold exception reason.	Y	4	4	3	1	

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?

How easy was the task?

Are you satisfied with the results you received?

How helpful will the task be to staff?

How likely are you to perform the task after beta?

Comments/
Explanation of Rating

Tool

Task

Y/N

1-5

1-5

1-5

1-5

Tool	Task	Did you complete the task?	How easy was the task?	Are you satisfied with the results you received?	How helpful will the task be to staff?	How likely are you to perform the task after beta?	Comments/ Explanation of Rating
		Y/N	1-5	1-5	1-5	1-5	
Tool 20	If applicable, flag a secondary name as Power of Attorney. Verify the new POA designation is shown on the account using Inquiry and selecting secondary names.	Y	5	5	5	5	
Tool 20	Verify the last maintenance date updates (or date added is created) when adding or making changes to the secondary name on a members account.	Y	5	5	5	5	Love it! So much easier for auditing purposes
Tool 20	Add comments to a secondary name on an account. Verify the comments save on the account using Inquiry and selecting secondary names.	Y	5	3	4	3	I do not like that it highlights the names yellow when there is a comment as that usually means "bad" or something to highlight. If we want to leave comments for every relationship the yellow is just noise.
F1 - Inquiry	Verify the data on a secondary name by selecting secondary names on an account and choosing F20, contact information. Make sure the print name on correspondence and power of attorney flags are accurate. Verify the DBA name appears, if applicable. Verify the date added and maintained date are accurate (if new).	N					
Forms	Verify secondary names are correct on any forms that have them.	Y					Have not heard any feedback from staff about missing names - you already corrected the missing Photo ID for secondary names

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

Comments/ Explanation of Rating

M A N A G E M E N T

Tool	Task	Did you complete the task?	How easy was the task?	Are you satisfied with the results you received?	How helpful will the task be to staff?	How likely are you to perform the task after beta?	Comments/ Explanation of Rating
Tool 558	Update 'Waive Fees if Authorized Positive' field to Y-Yes. Ensure management approves turning this option on. Turning on this feature will affect all accounts. Review NSF debit card transactions to ensure fee waivers are what is expected.	Y	4	5	3	5	More useful for compliance/ relationships than staff day to day
Tool 225	If possible, add one or more membership designations to the "Exception Delinquency Freeze Settings" and fill in the remainder of these settings. With daily processing, ensure accounts that are part of the selected membership designations are freezing/unfreezing/remaining unfrozen as expected.	N					
Tool 707	Run the simulation report for qualified dividends to see how it would impact business.	Y	5	5	4	4	Pretty nifty, will work perfectly for my personal duties/tasks.

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

Beta Test Checklist

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

Credit Union Name: Peninsula Federal Credit Union

Primary Contact Name: Kim Kareckas

Primary Contact Phone Number: [REDACTED]



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

**Comments/
Explanation of Rating**

MEMBER FACING		Did you complete the task?	How easy was the task?	Are you satisfied with the results you received?	How helpful will the task be to staff?	How likely are you to perform the task after beta?	Comments/ Explanation of Rating
Tool	Task	Y/N	1-5	1-5	1-5	1-5	
Sample tool	Sample task	Y	3	2	4	5	This feature will really make processing much easier for tellers.
Tool 777	Choose a DIVAPL with Qualified Dividends, then choose Qualified Dividends on the bottom. Select the option to Require RDC Enrollment.	N				1	
Tool 569	1) Verify that the temporary password only allows for B = Birth year & first two letters of last name. 2) Verify Minimum length of password is 8-10 characters.	Y	5	5	5	5	
Tool 14 / It's Me 247	If possible, reset some employee online banking passwords and verify the temporary password resets according to the new configuration	Y	5	5	5	5	
LENDING							

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	Comments/ Explanation of Rating
Tool 2	While working on a loan application, use the new Print Forms button to access CU*Forms. Confirm CU*Forms launches in a new webpage and displays the loan application number you are working with.	Y	5	5	5	5	
Tool 2	While working on a loan application, use the new Go to Underwriting button to access CU*Forms. Confirm CU*Forms launches in a new webpage and displays the underwriting information for the loan application you are working with.	Y	5	5	5	5	
Tool 2	While working on a loan application, use the new Go to FormFLOW button to access CU*Forms. Confirm CU*Forms launches in a new webpage and displays the FormFLOW section for the loan application you are working with.	Y	5	5	5	5	
Tool 2	While working on a loan application, use the new Work with Mortgage Forms button. Confirm the Imaging Teams store page for Mortgage Forms launches in a new webpage.	Y	5	5	5	5	
Tool 2	While working on a loan application, use the new CU*Chat button. Confirm the LenderVP Team store page for CU*Chat launches in a new webpage.	Y	5	5	5	5	
Tool 1340 / 1045	Access the tool and confirm that the new field expiration date is present on the screen	Y	5	5	5	5	

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest)					Comments/ Explanation of Rating	
		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	
Tool 1340 / 1045	If you will be creating a Traditional funded or unfunded 1Click offer during the Beta Period confirm that you are able to set the expiration date to any time from 1 to 365 days after the offer creation date.		Y	5	5	5	5	
Tool 1340 / 1045	If you will be creating a Traditional funded or unfunded 1Click offer during the Beta Period confirm that you have no issues navigating through the fields/panels and that the 1Click offers are created as expected		Y	5	5	5	5	
Tool 1340 / 1045	Confirm that members can accept/decline offers in Its Me 247 created before or during the Beta period		Y	5	5	5	5	
Tool 1011	If you will be offering a Relationship 1Click, select an existing CLRPath model for use with the offer or create a model where only your targeted testing group would qualify- For example only members of a specific Insider/Employee Type		Y	5	5	5	5	
CU Publisher	Link to 'My Offers' module will need to be activated in CU Publisher. If you need assistance with enabling the feature, please reach out to us at Qualitycontrolteam@cuanswers.com		Y	5	5	5	5	
Tool 1061/1062	Relationship 1Click offers Configure and View – are new tools. Your security officer will need to grant you access.		Y	5	5	5	5	
Tool 1061	Use this tool to create a Relationship 1Click offer Confirm that you can set the offer active range Confirm that initial Score Range starts at the minimum score to		Y	5	5	5	5	
Tool 1061	Enter Score Ranges and Maximum Dollar amounts as applicable Confirm score range ends at a score of 999		Y	5	5	5	5	

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?

How easy was the task?

Are you satisfied with the results you received?

How helpful will the task be to staff?

How likely are you to perform the task after beta?

Comments/
Explanation of Rating

Tool	Task	Y/N	1-5	1-5	1-5	1-5	1-5	Comments/ Explanation of Rating
Tool 1061	Confirm that you have no issues navigating through the fields and panels involved with creating the Relationship offer	Y	5	5	5	5	5	
It's Me 247	Log into Its Me 247 – Qualified for Relationship Offer Select My Offers – confirm that module launches and offer presented Confirm offer amount is correct for the CLR Path Score/Score Range Confirm able to select a lower loan amount. Complete the 1Click process confirm loan created and all documents and records reflect the requested loan amount	T	5	5	5	5	5	
It's Me 247	Log into Its Me 247 – Not Qualified for Relationship Offer Select My Offers – confirm that module launches and no Relationship offer is presented	Y	5	5	5	5	5	
It's Me 247	Confirm Traditional 1Click offers are presented via Banner and in My Offers module	Y	5	5	5	5	5	
Tool 2	Follow procedures for marking 1Click offers Completed. Confirm no issues.	Y	5	5	5	5	5	
T E L L E R / M E M B E R S E R V I C E								
Tool 1	Deposit some outside checks. Use the lookup to change the number of hold days using one of the new exception check hold reasons. Confirm the correct number of hold days is applied. Verify the receipt shows the hold reason. Verify the number of hold days calculated is correct and applied to the account.	N						

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest)					Comments/ Explanation of Rating	
		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	
F2 – Phone Operator	Perform a funds transfer on a members account from one account type to another. Use the account type lookup. Verify all accounts that you can transfer to are shown. Make sure the transfer occurs and updates the members balance correctly. Verify the receipt is correct.		Y	5	5	5	5	
F2 – Phone Operator	Perform a funds transfer from one members account to another. Use the global search to locate the second account. Use the account type lookup when selecting the suffix and verify the transaction occurs correctly. Verify the receipt is correct.		Y	5	5	5	5	
F2 – Phone Operator	If possible, perform a funds transfer using at least one HSA or IRA account type. Verify the transaction updates the member balance correctly. Verify that the members IRA or HSA account balance is updated correctly. Verify the receipt is correct.		Y	5	5	5	5	
Tool 516	Perform a funds transfer using tool 516. Use the global search and account type lookup when selecting account and type. Verify that all account types you should be able to transfer to/from are shown. After the transfer, verify the members account balance. If possible, repeat this process with an IRA and/or HSA account type. Double check the members IRA/HSA balance after the transaction. Check the receipt for accuracy.		Y	5	5	5	5	

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

Comments/
 Explanation of Rating

Tool	Task	Did you complete the task?	How easy was the task?	Are you satisfied with the results you received?	How helpful will the task be to staff?	How likely are you to perform the task after beta?	Comments/ Explanation of Rating
Tool 354	If possible, perform an effective dated account transfer. Use the global search and account type lookup when selecting account and type. Verify that all account types you should be able to transfer to/from are shown. After the transfer, verify the members account balance.	Y	5	5	5	5	
Tool 355	Setup some new electronic deposit holds configurations for exception holds. Use the teller outside checks section to configure the hold days.	N					
Tool 849	Activate the new check hold exception reasons. Hit Save/Update. Add some exception check holds.	N					
Tool 1600	Deposit some outside checks. Use the lookup to change the number of hold days using one of the new exception check hold reasons. Confirm the correct number of hold days is applied. Verify the receipt shows the hold reason. Verify the number of hold days calculated is correct and applied to the account.	N					
Tool 919	After applying a hold using teller, verify the uncollected funds screen shows the correct check hold exception reason.	N					

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?

How easy was the task?

Are you satisfied with the results you received?

How helpful will the task be to staff?

How likely are you to perform the task after beta?

Comments/
Explanation of Rating

Tool	Task	Did you complete the task?	How easy was the task?	Are you satisfied with the results you received?	How helpful will the task be to staff?	How likely are you to perform the task after beta?	Comments/ Explanation of Rating
		Y/N	1-5	1-5	1-5	1-5	
Tool 20	If applicable, flag a secondary name as Power of Attorney. Verify the new POA designation is shown on the account using Inquiry and selecting secondary names.	N				5	
Tool 20	Verify the last maintenance date updates (or date added is created) when adding or making changes to the secondary name on a members account.	N					
Tool 20	Add comments to a secondary name on an account. Verify the comments save on the account using Inquiry and selecting secondary names.	N					
F1 - Inquiry	Verify the data on a secondary name by selecting secondary names on an account and choosing F20, contact information. Make sure the print name on correspondence and power of attorney flags are accurate. Verify the DBA name appears, if applicable. Verify the date added and maintained date are accurate (if new).	N					
Forms	Verify secondary names are correct on any forms that have them.	N					

Tool	Task	Rate each item on a scale of 1-5. (5 = highest, 1 = lowest)					Comments/ Explanation of Rating
		5 Extremely	4 Very	3 Somewhat	2 Slightly	1 Not at all	
MANAGEMENT		N/A Not applicable	Y/N	1-5	1-5	1-5	1-5
Tool 558	Update 'Waive Fees if Authorized Positive' field to Y-Yes. Ensure management approves turning this option on. Turning on this feature will affect all accounts. Review NSF debit card transactions to ensure fee waivers are what is expected.		N				3
Tool 225	If possible, add one or more membership designations to the "Exception Delinquency Freeze Settings" and fill in the remainder of these settings. With daily processing, ensure accounts that are part of the selected membership designations are freezing/unfreezing/remaining unfrozen as expected.		N				3
Tool 707	Run the simulation report for qualified dividends to see how it would impact business.		Y	5	5	5	5

GENERAL COMMENTS

Thank you for allowing us to participate in this beta test. Overall it went well. Our IT team had some issues arise but all eventually were resolved. Thank you! Kim Kareckas

Beta Test Checklist

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

Credit Union Name: LESCO FCU
 Primary Contact Name: NEAL FENTON
 Primary Contact Phone Number: [REDACTED]



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

**Comments/
Explanation of Rating**

MEMBER FACING							
Tool	Task	Did you complete the task?	How easy was the task?	Are you satisfied with the results you received?	How helpful will the task be to staff?	How likely are you to perform the task after beta?	Comments/Explanation of Rating
Sample tool	Sample task	Y	3	2	4	5	This feature will really make processing much easier for tellers.
Tool 777	Choose a DIVAPL with Qualified Dividends, then choose Qualified Dividends on the bottom. Select the option to Require RDC Enrollment.						N/A
Tool 569	1) Verify that the temporary password only allows for B = Birth year & first two letters of last name. 2) Verify Minimum length of password is 8-10 characters.	Y	5	5	5	5	
Tool 14 / It's Me 247	If possible, reset some employee online banking passwords and verify the temporary password resets according to the new configuration	Y	5	5	5	5	
LENDING							

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

Comments/
Explanation of Rating

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	Comments/ Explanation of Rating
Tool 2	While working on a loan application, use the new Print Forms button to access CU*Forms. Confirm CU*Forms launches in a new webpage and displays the loan application number you are working with.	Yes	slow 4	1	1	1	More work than looking at forms Below
Tool 2	While working on a loan application, use the new Go to Underwriting button to access CU*Forms. Confirm CU*Forms launches in a new webpage and displays the underwriting information for the loan application you are working with.	Yes	slow 4	4	4	2	nice to be able to read all details this is a nice feature
Tool 2	While working on a loan application, use the new Go to FormFLOW button to access CU*Forms. Confirm CU*Forms launches in a new webpage and displays the FormFLOW section for the loan application you are working with.	Yes	slow 4	1	1	1	would not use
Tool 2	While working on a loan application, use the new Work with Mortgage Forms button. Confirm the Imaging Teams store page for Mortgage Forms launches in a new webpage.						Coming soon
Tool 2	While working on a loan application, use the new CU*Chat button. Confirm the LenderVP Team store page for CU*Chat launches in a new webpage.						Coming soon
Tool 1340 / 1045	Access the tool and confirm that the new field expiration date is present on the screen	Yes					1 click No

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

Comments/
Explanation of Rating

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	Comments/ Explanation of Rating
Tool 1340 / 1045	If you will be creating a Traditional funded or unfunded 1Click offer during the Beta Period confirm that you are able to set the expiration date to any time from 1 to 365 days after the offer creation date.	/	/	/	/	/	n/a
Tool 1340 / 1045	If you will be creating a Traditional funded or unfunded 1Click offer during the Beta Period confirm that you have no issues navigating through the fields/panels and that the 1Click offers are created as expected	/	/	/	/	/	n/a
Tool 1340 / 1045	Confirm that members can accept/decline offers in Its Me 247 created before or during the Beta period						1 click I do not see this
Tool 1110	If you will be offering a Relationship 1Click, select an existing CLRPath model for use with the offer or create a model where only your targeted testing group would qualify- For example only members of a specific Insider/Employee Type	/	/	/	/	/	n/a
CU Publisher	Link to 'My Offers' module will need to be activated in CU Publisher. If you need assistance with enabling the feature, please reach out to us at Qualitycontrolteam@cuanswers.com						
Tool 1061/1062	Relationship 1Click offers Configure and View – are new tools. Your security officer will need to grant you access.	/	/	/	/	/	n/a
Tool 1061	Use this tool to create a Relationship 1Click offer Confirm that you can set the offer active range Confirm that initial Score Range starts at the minimum score to	/	/	/	/	/	n/a
Tool 1061	Enter Score Ranges and Maximum Dollar amounts as applicable Confirm score range ends at a score of 999						this is 1Click

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

Comments/
Explanation of Rating

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	Comments/ Explanation of Rating
Tool 1061	Confirm that you have no issues navigating through the fields and panels involved with creating the Relationship offer						1 Click
It's Me 247	Log into Its Me 247 – Qualified for Relationship Offer Select My Offers – confirm that module launches and offer presented Confirm offer amount is correct for the CLR Path Score/Score Range Confirm able to select a lower loan amount. Complete the 1Click process confirm loan created and all documents and records reflect the requested loan amount						N/A
It's Me 247	Log into Its Me 247 – Not Qualified for Relationship Offer Select My Offers – confirm that module launches and no Relationship offer is presented						
It's Me 247	Confirm Traditional 1Click offers are presented via Banner and in My Offers module						N/A 1 Click
Tool 2	Follow procedures for marking 1Click offers Completed. Confirm no issues.						N/A 1 Click
TELLER / MEMBER SERVICE							
Tool 1	Deposit some outside checks. Use the lookup to change the number of hold days using one of the new exception check hold reasons. Confirm the correct number of hold days is applied. Verify the receipt shows the hold reason. Verify the number of hold days calculated is correct and applied to the account.	Y	5	5			

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

Comments/
Explanation of Rating

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	Comments/ Explanation of Rating
F2 – Phone Operator	Perform a funds transfer on a members account from one account type to another. Use the account type lookup. Verify all accounts that you can transfer to are shown. Make sure the transfer occurs and updates the members balance correctly. Verify the receipt is correct.	Y	5	5	5	5	
F2 – Phone Operator	Perform a funds transfer from one members account to another. Use the global search to locate the second account. Use the account type lookup when selecting the suffix and verify the transaction occurs correctly. Verify the receipt is correct.	Y	5	5	5	5	
F2 – Phone Operator	If possible, perform a funds transfer using at least one HSA or IRA account type. Verify the transaction updates the member balance correctly. Verify that the members IRA or HSA account balance is updated correctly. Verify the receipt is correct.						N/A
Tool 516	Perform a funds transfer using tool 516. Use the global search and account type lookup when selecting account and type. Verify that all account types you should be able to transfer to/from are shown. After the transfer, verify the members account balance. If possible, repeat this process with an IRA and/or HSA account type. Double check the members IRA/HSA balance after the transaction. Check the receipt for accuracy.	Y	5	5			

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

Comments/
Explanation of Rating

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	Comments/ Explanation of Rating
Tool 354	If possible, perform an effective dated account transfer. Use the global search and account type lookup when selecting account and type. Verify that all account types you should be able to transfer to/from are shown. After the transfer, verify the members account balance.						?
Tool 355	Setup some new electronic deposit holds configurations for exception holds. Use the teller outside checks section to configure the hold days.	Y	5				
Tool 849	Activate the new check hold exception reasons. Hit Save/Update. Add some exception check holds.	Y	5				
Tool 1600	Deposit some outside checks. Use the lookup to change the number of hold days using one of the new exception check hold reasons. Confirm the correct number of hold days is applied. Verify the receipt shows the hold reason. Verify the number of hold days calculated is correct and applied to the account.	Y	5				
Tool 919	After applying a hold using teller, verify the uncollected funds screen shows the correct check hold exception reason.	Y	5				

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

Comments/
Explanation of Rating

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	Comments/ Explanation of Rating
Tool 20	If applicable, flag a secondary name as Power of Attorney. Verify the new POA designation is shown on the account using Inquiry and selecting secondary names.						It adds POA as joint owner which we do not want
Tool 20	Verify the last maintenance date updates (or date added is created) when adding or making changes to the secondary name on a members account.	Y	5	5	5	5	
Tool 20	Add comments to a secondary name on an account. Verify the comments save on the account using Inquiry and selecting secondary names.	Y	5	5	5	5	
F1 - Inquiry	Verify the data on a secondary name by selecting secondary names on an account and choosing F20, contact information. Make sure the print name on correspondence and power of attorney flags are accurate. Verify the DBA name appears, if applicable. Verify the date added and maintained date are accurate (if new).						?
Forms	Verify secondary names are correct on any forms that have them.						

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

Comments/
Explanation of Rating

Tool Task

MANAGEMENT							
Tool 558	Update 'Waive Fees if Authorized Positive' field to Y-Yes. Ensure management approves turning this option on. Turning on this feature will affect all accounts. Review NSF debit card transactions to ensure fee waivers are what is expected.						
Tool 225	If possible, add one or more membership designations to the "Exception Delinquency Freeze Settings" and fill in the remainder of these settings. With daily processing, ensure accounts that are part of the selected membership designations are freezing/unfreezing/remaining unfrozen as expected.						
Tool 707	Run the simulation report for qualified dividends to see how it would impact business.						

GENERAL COMMENTS

LOOKING FORWARD TO
JOE BAR DISCUSSION ON
TOOLS 225 AND 558

LOOKING FORWARD TO LEARNING
MORE ABOUT "QUALIFIED DIVIDENDS"