

ANNOUNCEMENT TO **Online and Self Processing Credit Unions**

CU*ANSWERS
A CREDIT UNION SERVICE ORGANIZATION

ATTENTION **Data Processing Coordinator**

DATE **March 25, 2026**

announcement

5300 CALL REPORT TOOLS FOR CBX:

A Quick Status Report Before You Start Your 1st Qtr Call Report

There were no Account Code changes made by the NCUA for the 1st quarter of 2026. To review the current NCUA 5300 Call Report Instructions and Account Code detail, refer to the [Credit Union Online](#) page.

Did You Know?

Multiple Automation Routines for Single Account Code

The 5300 Call Report software offers the flexibility to configure multiple automation routines (where appropriate) for a single Account Code. For example, if used-auto loans at your credit union are defined by both loan category and loan purpose codes, both routines can be used, and the figures will be added together. Please note that the “auto-pop” calculation prevents duplicates; if a loan falls within both the designated loan category and loan purpose codes, it will not be counted twice.

Using multiple automation routines for the same Account Code is most common for the loan sections of the Call Report that allow the following automation routines:

- Loan Counts/Amounts by Purpose Code
- Loan Counts/Amounts by Security Code
- Loan Counts/Amounts by Category Code
- Member Count/Amounts by G/L (from EOM MEMBER files)

Note: Automation routines are available on specific Account Codes within the Call Report software. Credit unions select from available automation routines and configure the appropriate codes, G/L's, etc. as appropriate. When the Call Report is created, the software automatically calculates the figures based on the credit union's configuration.

For more information on 5300 Call Report automation routines, refer to the [5300 Call Report Tools booklet](#). If you need assistance configuring your automation routines, contact [Earnings Edge Account Services](#).

We are always looking for ideas on how to improve the 5300 software. Contact callreport@cuanswers.com with any suggestions! Be sure to check out the AnswerBook for FAQs and helpful tips:

<https://kb.cuanswers.com/cuanswers/consumer/search.asp?action=search&keyword=5300&match=or>

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