

February Release 2016

Software Upgrade

Product:	Version #:	To be released to:	On date:
CU*BASE® GOLD	16.02	Online CUs	February 14, 2016
		Site-Four	February 14, 2016
		Self-Processors	March 7 & 8, 2016

Updated booklets will be posted on our website no later than:

February 12, 2016

This release includes changes to key database tables (files). **You must update your automated Queries** prior to their next scheduled run date!

See the separate Database Changes announcement for instructions.

Key to the symbols:

- You'll see it immediately
- You'll need to activate it
- You'll need to work with a CSR to set it up
- There may be related fees; contact a CSR

INCLUDED IN THIS RELEASE

CEO/Management _____	2
<input checked="" type="checkbox"/> Brand New Credit Card Dashboard _____	2
<input checked="" type="checkbox"/> Even More Dashboard Improvements! _____	2
Indirect Lending _____	3
<input checked="" type="checkbox"/> Take Control of Indirect Dealer Reports _____	3
Special Sneak Peek for Indirect Lending _____	3
<input type="checkbox"/> Talk Back to your Dealers _____	3
Accounting/Back Office _____	3
<input checked="" type="checkbox"/> Non-Member Maintenance Updates _____	3
<input checked="" type="checkbox"/> Additional NCUA Edits Added to 5300 Call Report Tool _____	3
<input checked="" type="checkbox"/> Improving the Database Search Assistant _____	3
<input checked="" type="checkbox"/> New Escrow Analysis Reminder for 360 Mortgage Payoff _____	4
<input checked="" type="checkbox"/> HSA Posting Code Changing for Some Fees _____	4
For Your IT Administrators _____	4
<input checked="" type="checkbox"/> Learning About Workstations for Future Improvements _____	4

May Release 2016

Software Upgrade

Product:	Version #:	To be released to:	On date:
CU*BASE® GOLD	16.05	Online CUs	May 15, 2016
		Site-Four	May 15, 2016
		Self-Processors	June 6-7, 2016





Updated booklets will be posted on our website no later than:

May 13, 2016

This release includes changes to key database tables (files). **You must update your automated Queries** prior to their next scheduled run date!

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INCLUDED IN THIS RELEASE

Member Facing	2
 Architecture for Membership Application/Opening Process (MAP/MOP)	2
 Introducing the Mobile Experience Center – The FREE App Store in Online Banking	2
 eStatements Now Viewed inside of “It’s Me 247”	3
Teller/Member Service	3
 A More Powerful Phone Op History Tool...Now Available from Member Inquiry Tool!	3
 Introducing a New Combined Audit Key Inquiry Tool: Activity for This Member	4
 Beefed Up Secondary Transaction Description – Now Available via Inquiry Too	4
 Enhanced Fraud Warning Window	4
 New Screen Shows Member’s Transaction Activity that Triggers Warning	5
 Always View the Online Banking Button	5
 Disburse Available Balance Funds at the Teller Line	5
 Who Was Served Now Easier to Research	6
 Change to Receipt Description for In-House Drafts	6
Audit	6
 Better Tool for Tracking Cashed-Check Activity	6
 Enhancements to the Teller SARs/Fraud Alert	6
 ATM Transactions Now Included in Bank Secrecy Monitoring	7
Marketing	7
 One Click Next Suggested Product Takes Tellers Directly to Your Promotion	7
Lending	7
 Free Remote Signature Capability Now Available to Online Clients	7
 Redesigned Access to the Loan Product Configuration Screens	8
 More Controls in Loan Requests and Loan Form Defaults	8
 Easily Copy Checklist Tasks from One Loan Product to Another	9
 All Reference Data Retained Similar to Employment Records	9
 New Tool in Your Arsenal - The “Step-Down” Business Loan	9

May Release (con't)

CEO/Management _____	10
<input checked="" type="checkbox"/> New! Write-Off/Charge-Off Dashboard Analysis _____	10
<input checked="" type="checkbox"/> New Learn from a Peer Online Banking Change Dashboard _____	11
<input checked="" type="checkbox"/> Phone Operator Wrap-up Codes – A Tool to Track Call Center Activity _____	11
<input checked="" type="checkbox"/> Dashboard Standardization Phase 4 _____	12
<input checked="" type="checkbox"/> Collect a Partial Fee in Available Balance for Service Charges _____	12

Revised: May 5, 2016

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<input checked="" type="checkbox"/> File Change for Certificate (CD) Types Expansion _____	12
<input checked="" type="checkbox"/> Fee Waivers for Active Credit Cards Now Standardized _____	12
<input checked="" type="checkbox"/> Changes to and Sunset of Transaction Origin Codes _____	13
Accounting/Back Office _____	13
<input checked="" type="checkbox"/> New Features for Handling Transactions via Direct/Mail Post _____	13
EFT _____	14
<input checked="" type="checkbox"/> Upgrades to Credit Card BIN Functionality _____	14
<input checked="" type="checkbox"/> MasterCard Introduces New BIN Series _____	14
Self Processors _____	14
Start, End and Monitor Your Subsystems from One Convenient Place! _____	14
<input checked="" type="checkbox"/> New Operator Edition Help – Designed for Self Processing Clients _____	15

July Release

Software Upgrade

Product:	Version #:	To be released to:	On date:
CU*BASE® GOLD	16.07	Online CUs	July 17, 2016
		Site-Four	July 17, 2016
		Self-Processors	August 8, 2016





Updated booklets will be posted on our website no later than:

July 15, 2016







This release includes changes to key database tables (files). **You must update your automated Queries** prior to their next scheduled run date!

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INCLUDED IN THIS RELEASE

Accounting/Back Office _____	1
 OpsEngine Remote Desktop Capture Posting (RDC) Service Now Offers Check Holds _____	1
 Direct Mail Post Feature Now Allows Hold Days on Deposits _____	2
CEO/Management _____	2
 Loan Payment Dashboard is Now Easier to Analyze _____	2
 Print Your Loan Risk Score Analysis Report by Loan Category _____	2
Lending _____	3
 View All Officers Involved with Loan at the Same Time _____	3
Member Facing _____	3
 New Security Features in Mobile Web Banking and Mobile App Banking _____	3

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October Release

Software Upgrade

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Product:	Version #:	To be released to:	On date:
CU*BASE® GOLD	16.10	Online CUs	October 23, 2016
		Site-Four	October 23, 2016
		Self-Processors	November 7-8, 2016

Updated booklets will be posted on our website no later than:






















October 21, 2016

This release includes changes to key database tables (files). **You must update your automated Queries prior to their next scheduled run date!**












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INCLUDED IN THIS RELEASE

Member Facing	2
 Members Can Now Schedule Regular Transfers to "Off the Books" Accounts	2
 Members Can Now Stop Checks and View Dividends/Interest Details on Their Phone	3
 New Fiserv Builder Bill Pay Interface Designed and Developed	3
Teller/Member Service	3
 More Functionality at the Teller Line with Negative Balance Overrides	3
 Easily Research All Auto Funds Transfers (AFT's) To and From an Account	4
 Now Use CU*BASE to Schedule AFT's to Accounts that are "Off the Books" (OTB and A2A)	4
 Last Ten Lookup Added to Five Additional Screens	4
 New National Shared Branching Control with Deposit/Withdrawal Limits and New Member Waiting Periods	5
 Displaying OTB Loan Transaction History in Inquiry/Phone (An OTB "TotalLook" Project)	5
Marketing	6
 Credit and Debit Card Usage Points Added to Tiered Service Scoring	6
 Use Credit Score to Increase Members' Tiered Service Points	6
 Grant Primary Institution Tiered Services Points For Special Loans	6
CEO/Management	7
 Dashboard for List Generator	7
 Analyze Your Loan Application Data Across Credit Score Tiers with the Look to Book Analysis Dashboard	7
 Enhancements for the Fee Income/Waiver and Fee Refund Dashboards	7
 New Learn from a Peer Net Relationship Dashboard	8
 1-Click Trackers in Phone Op Following a Member Service Call	8
 Contingent Liability Report Now Added to Report Scheduler	8
 Enhancements to Assist with 5300 Call Report Investment Section	9
 Multiple Branch Filter Added to All Accounts and All Memberships Dashboards	9
 Require Large Balance on Savings Account Product to Receive Dividend	9

October Release (con't)

Lending	9
 New Configurable Filters for 247 Lending: More Control For Your Decisions	9
 Easily Update Collateral Record to Current NADA Value	10
 New Escrow Format Type for Private Mortgage Insurance (PMI)	10
 Contract Variable Rate Change Notice Enhancement	10
EFT	11
 Further Improvements to the ATM/Debit and Credit Card Ordering Process Makes Embossing Names and Ordering Cards a Breeze	11
 New Rate? No Problem – Introducing Category Change Tools for Credit Card Loans	11
 Have Members Who Travel? Alternate Address Processing Now Available as an EFT Feature within CU*BASE	11
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Auditing	12
 Analyze Fee Refunds and Waivers by Employee	12
Accounting/Back Office	12
 Updated Tracker Codes Explain Why a Member Notice Was Skipped	12
 Solution to Changing Social Security Treasury Company IDs – Now Only Manage One ACH Distribution List	12
 New Notice Event for Safe Deposit Box Fees	13

November Release (coming soon)

Implementation date with online clients: November 28, 2016

December Release (coming soon)

Implementation date with online clients: December 4, 2016