

CU*TALK CHANGE REQUEST: CONFIGURATION

Rev. June 27, 2013

Use this form to change the configuration parameters and/or general messages used by CU*TALK Audio Response for your credit union. **Please fill out this form electronically; handwritten copies are not accepted by our third-party recording resource.**

Credit Union Name _____ CU# _____
Completed by _____ Date _____

- We are interested in having a special phone number just for our members. Please have someone contact me.

Submitting This Form

After filling this form out electronically, click the File menu and choose Save As and save the document (use any name and location you like). Then attach the file to an email message and send it to csr@cuanswers.com. All changes submitted by the 10th of the month will be implemented within 14 business days. Changes received after the 10th deadline will not be implemented until the following month.

Secondary Greeting

The initial Audio Response system greeting is: "Thank you for calling your credit union's telephone account access system." You may choose to have an additional, secondary greeting that identifies your credit union or your audio response product name after the member enters the credit union access code. Please specify the text exactly as you wish it to be read. Do not use abbreviations unless you want them to be read that way (i.e., use "Credit Union" if you want that to be read; use "CU" and it will be read as the letters C U).

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- The initial greeting is plenty; we do not wish to use a secondary greeting.

Credit Union Locations/Hours Message

CU*TALK Audio Response allows for a free-form message under the heading "Credit Union Locations and Hours." This can be used to list credit union branch locations, business hours and other special information (such as shared branching sites). Please specify the text exactly as you wish it to be read. Do not use abbreviations unless you want them to be read that way (i.e., use "Credit Union" if you want that to be read; use "CU" and it will be read as the letters C U).

Configuration Parameters

This section contains other configuration parameters that can be set up to allow access to optional features, control member access to certain account types, etc. Remember that if your credit union also offers **It's Me 247** Online Banking Services, the settings below will affect both systems. It is not possible to use different settings for each system.

- | Yes | No | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Allow Audio Response for your credit union members? |
| <input type="checkbox"/> | <input type="checkbox"/> | Activate Audio Response automatically for all new memberships? |
| <input type="checkbox"/> | <input type="checkbox"/> | Should CU staff be allowed to set specific custom PIN/passwords based on a member request? |
| <input type="checkbox"/> | <input type="checkbox"/> | Should Audio/Home Banking transactions be considered Regulation E? |
| <input type="checkbox"/> | <input type="checkbox"/> | Are transfers between different account base numbers allowed?
If yes, do you wish to control to which accounts each member can transfer?
<input type="checkbox"/> Yes <input type="checkbox"/> No |
| <input type="checkbox"/> | <input type="checkbox"/> | Allow a member to request a CU check?
If Yes, Minimum check amount: \$
Maximum check amount: \$ |
| <input type="checkbox"/> | <input type="checkbox"/> | Allow a member to stop payment on a check?
If Yes, how long should these stop pay orders be retained before purging?
<input type="checkbox"/> Days <input type="checkbox"/> Months |
| <input type="checkbox"/> | <input type="checkbox"/> | When calculating available balance for share accounts, should par value be deducted from the current balance? |
| <input type="checkbox"/> | <input type="checkbox"/> | When calculating available balance for share accounts, should uncollected funds be deducted from the current balance? |
| <input type="checkbox"/> | <input type="checkbox"/> | When calculating available balance for certificate accounts, should the penalty be deducted from the current balance? |