Writing Team: Tricks of the Trade
August Top Picks: 15.1 CU*BASE Release Docs
Issue 45

Be sure to attend the upcoming Tricks of the Trade webinar on August 18 from 3:30-4:00 PM ET. Watch for an invitation via email. Learn about new features implemented with the 15.1 release, including ones that are documented in more detail in reference booklets.

Pick #1: When a member submits an online loan application, I want my loan department to get a notification.

Starting with the 15.1 release, you can configure CU*BASE so that your loan department is immediately notified when a member submits a new loan application in online or mobile banking. By using a distribution list, you can easily change the list of individuals who are notified.

Find out more in the "Selling Products Online" booklet posted under "S" on the CU*BASE Reference page.

Pick #2: My state requires that information on the spouse be included on a loan application. I want to ensure I get this when a member applies online.

The 15.1 release includes a large number of updates to the online loan application, one of which relates to community property. Your credit union can now activate a feature in CU*BASE that will require applicants who indicate that they are married to fill in the fields on the "Information about Your Spouse" page of the updated online loan application.

Find out more in the "Associated Applications" booklet posted under "A" on the CU*BASE Reference page.

Pick #3: I want to learn more about the TILA/RESPA mortgage loan estimate and closing disclosure forms.

While the deadline for mortgage lenders to move to the new disclosures isn't until August 1, 2015, we're implementing the disclosure screens in the 15.1 release. These new mortgage forms are designed to make information easier to input, save, and print. They also make it easier for members to locate important loan information.

Find out more in the new "TILA Integrated Disclosures (TRID)" booklet posted under "T" on the CU*BASE Reference page.

Pick #4: When I send an external wire transfer, I want to first check if there were any recent email, phone number, or address changes made on the account.

The Red Flag feature allows you to check an account for recent personal information changes, including email, phone number, and address changes. You can now activate this feature for external wire transfers.

Find out more in the "Wire Transfers in CU*BASE" booklet posted under "W" on the CU*BASE Reference page.

Pick #5: I want to learn about what was included in the 15.1 release.

The 15.1 CU*BASE Release summary contains information about the new features included in the release. All of the features covered in this issue of Tricks of the Trade are included, as well as others that did not require a change to a reference booklet.

Find the 15.1 CU*BASE Release Summary on the Release Summaries page.

Refer to the Tricks of the Trade Newsletter Series page to review previous Tricks of the Trade.