

■ ■ ■ ***“It’s Me 247” Configuration Change Request***

Revised: May 5, 2025

The purpose of this form is to define the configuration parameters and special messages used by **It’s Me 247** for your credit union. This form should be used to define the initial configuration (for new clients) as well as to request changes to existing parameters.

Credit Union Name

CU#

Completed by

Date

Submitting This Form

After completion, save this form by using *Save As* or by scanning it to your PC. Then, have the CEO or authorized executive management submit as an attachment to an [AnswerBook inquiry](#).

Questions? Contact the Client Services and Education team by phone at 616-285-5711 or 800-327-3478.

All changes submitted by the 10th of each month will be implemented no later than the 20th of that same month. Changes received after the 10th deadline will not be implemented until the following month.

Section 1: General Messages

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. using ‘Credit Union’ if you want that to be read; use ‘CU’ and it will be read as the letters C U).

⇒ HINT: Although your conversion coordinator will set up your original text for you, you can make changes yourself at any time using **Tool #852 Text-to-Speech ARU Greeting/Locations**. For more information on text-to-speech for credit union hours and locations, [check out our online help topic](#).

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

Section 2: 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. Unless otherwise noted, settings will apply to both audio response and online banking; it is not possible to use different settings for each system.

1	<p>Allow audio response for your members? <i>(Each member will need to be enrolled in CU*BASE)</i></p> <p>If yes, would you like to have a unique 1-800 audio response phone number? <i>(Otherwise, members will call the standard number (616-285-5720 or 800-860-5704) and then enter your 3-digit CU access code before logging in).</i></p>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No
2	<p>Allow online banking for your members?</p> <p>If yes, activate online banking automatically for all new memberships?</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No
3	<p>Should audio/online banking transactions be considered Regulation E?</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
4	<p>Are transfers between different account base numbers allowed? <i>(online banking only)</i></p> <p>If yes, select yes/no on the following:</p> <ul style="list-style-type: none"> Allow members to key in account #, suffix and first 3 of last name? Only use member defined list in CU*BASE Use both member keys in or defined list in CU*BASE 	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No
5	<p>Allow a member to request a CU check? <i>(online banking only)</i></p> <p>If yes, what is the minimum check amount required?</p> <p>If yes, what is the maximum check amount required?</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No \$ \$
6	<p>Allow a member to stop payment on a check?</p> <p>If yes, how long should these stop pays be retained before purging?</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Days <input type="checkbox"/> Mos
7	<p>Allow members to maintain distributions on incoming ACH deposits? <i>(online banking only)</i></p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
8	<p>Allow members to maintain AFT (Automated Funds Transfer) records? <i>(online banking only)</i></p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
9	<p>Allow members to maintain CFT (Check Funds Transfer) records? <i>(online banking only)</i></p> <p>If yes, should partial checks be generated if all funds are not available?</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No

10	<p>Should check images be available to members through CU*Answers Item Processing? <i>(online banking only)</i></p> <p>Your check processing vendor <i>(custom programming changes may apply for third party item processors)</i></p>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> CU*A Item Processing <input type="checkbox"/> Other:
11	When calculating available balance for share accounts, should par value be deducted from the available balance?	<input type="checkbox"/> Yes <input type="checkbox"/> No
12	When calculating available balance for share accounts, should uncollected funds be deducted from the available balance?	<input type="checkbox"/> Yes <input type="checkbox"/> No
13	When calculating available balance for certificate accounts, should the penalty be deducted from the current balance?	<input type="checkbox"/> Yes <input type="checkbox"/> No
14	<p>Should members be allowed to give <i>Jump</i> permissions to their accounts in online banking? <i>Jump allows a member to log into one of their memberships, then “jump to” another of their memberships (same SSN) without additional authentication.</i></p> <p>Restrictions apply: for memberships with same SSN or Joint on base share 000 only.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
15	<p>Should credit score history be shown online to members?</p> <p>Show only if most recent score is not more than xxx days old <i>(maximum allowed 999)</i></p> <p>Tracker Type to use if scores are viewed by the member</p> <p>Memo Type to use if scores are viewed by the member</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No Days Tracker Type Memo Type
16	Are you interested in an online banking product designed for businesses with multi-user login capabilities?	<input type="checkbox"/> Yes <input type="checkbox"/> No