

# ■ ■ ■ "It's Me 247" Configuration Change Request

October 20, 2017

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

- If filling out manually: Fax the completed form to CU\*Answers Client Services, 616-285-7285
- If filling 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](mailto:csr@cuanswers.com).

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

## 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?</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> <p>If yes, activate audio response automatically for all new memberships?</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
2	<p>Allow online banking for your members?</p> <p>If yes, activate online banking automatically for all new memberships?</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
3	<p>Should CU staff be allowed to set specific custom PIN/passwords based on a member's request?</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
4	<p>Enforce complex rules for online banking passwords?</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>

5	Minimum length for online banking passwords (6-10 characters)	
6	Do you want a member's password to "expire" after a period of non-use? If yes, after how many days would you like to "expire" online banking passwords? Enter a number of days (1-90). (NOTE: If a member logs into online banking at least one time during this period, the member's password will never expire.)	<input type="checkbox"/> Yes <input type="checkbox"/> No  (1-90)
7	What would you like to have as your default temporary default password? ( <i>pick one of the following</i> )	<input type="checkbox"/> 4 digit birth year and first two letters of last name (All Caps) <input type="checkbox"/> Last 4 of SSN and 4 digit birth year <input type="checkbox"/> Last 4 of SSN <input type="checkbox"/> First 4 of SSN and first two letters of last name (All Caps)
	Do you want to require that members create a username to use in place of the account number when logging into online banking? (NOTE: Once you activate this requirement (select "Yes"), all members will be forced to create a username, either during the initial login process or the next time they log into online banking.)	<input type="checkbox"/> Yes <input type="checkbox"/> No
9	Should audio/online banking transactions be considered Regulation E?	<input type="checkbox"/> Yes <input type="checkbox"/> No
10	Are transfers between different account base numbers allowed? If yes, select to offer one or both of the options below: Do you wish to control to which accounts each member can transfer? Do you want to allow members to transfer funds to accounts by entering the account number directly with the first three letters of the last name?	<input type="checkbox"/> Yes <input type="checkbox"/> No  <input type="checkbox"/> Yes <input type="checkbox"/> No  <input type="checkbox"/> Yes <input type="checkbox"/> No
11	Allow a member to request a CU check? If yes, what is the minimum check amount required? If yes, what is the maximum check amount required?	<input type="checkbox"/> Yes <input type="checkbox"/> No \$ \$
12	Allow a member to stop payment on a check? If yes, how long should these stop pays be retained before purging?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Days <input type="checkbox"/> Mos
13	Allow members to maintain distributions on incoming ACH deposits? ( <i>online banking only</i> )	<input type="checkbox"/> Yes <input type="checkbox"/> No
14	Allow members to maintain AFT (Automated Funds Transfer) records? ( <i>online banking only</i> )	<input type="checkbox"/> Yes <input type="checkbox"/> No
15	Allow members to maintain CFT (Check Funds Transfer) records?	<input type="checkbox"/> Yes <input type="checkbox"/> No

	<p><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
16	<p>Should check images be available to members through CU*Answers Item Processing?</p> <p><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:
17	<p>Would you like to display your Tiered Service Levels statement messages in online banking?</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
18	<p>When calculating available balance for share accounts, should par value be deducted from the available balance?</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
19	<p>When calculating available balance for share accounts, should uncollected funds be deducted from the available balance?</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
20	<p>When calculating available balance for certificate accounts, should the penalty be deducted from the current balance?</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
21	<p>Should members be allowed to give <i>See</i> permissions to their accounts in online banking? <i>See allows a member view the Account Summary and Details pages of another membership.</i> (Restrictions apply: for memberships with same SSN or Joint on base share 000 only.)</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
22	<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> (Restrictions apply: for memberships with same SSN or Joint on base share 000 only.)</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No (NOTE: A credit union must activate <i>See</i> to activate <i>Jump</i> .
23	<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 (maximum allowed 999)</p> <p>Tracker Type to use if scores are viewed by the member 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
24	<p>Are you interested in an online banking product designed for businesses with multi-user login capabilities?</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No