





# CU\*BASE 12.3





# CU\*BASE® Software Upgrade

Online CUs	CU*NorthWest/CU*South	Self Processing CUs
December 9, 2012	December 9, 2012	December 17-18, 2012

Documentation will be available through the "What's New" topic in Online Help when you get the release. Updated online help , including the "What's New" summary list of all changes, will be included when you receive the release.

-  **Immediate Effect**      Changes automatically take place on the day the release is implemented; no additional configuration is required.
-  **Must be Activated**      Your credit union must make a decision either to activate it or modify configuration parameters. This sometimes requires contacting a Client Service Representative.
-  **Team Implementation**      Work with a Client Service Representative before implementation.

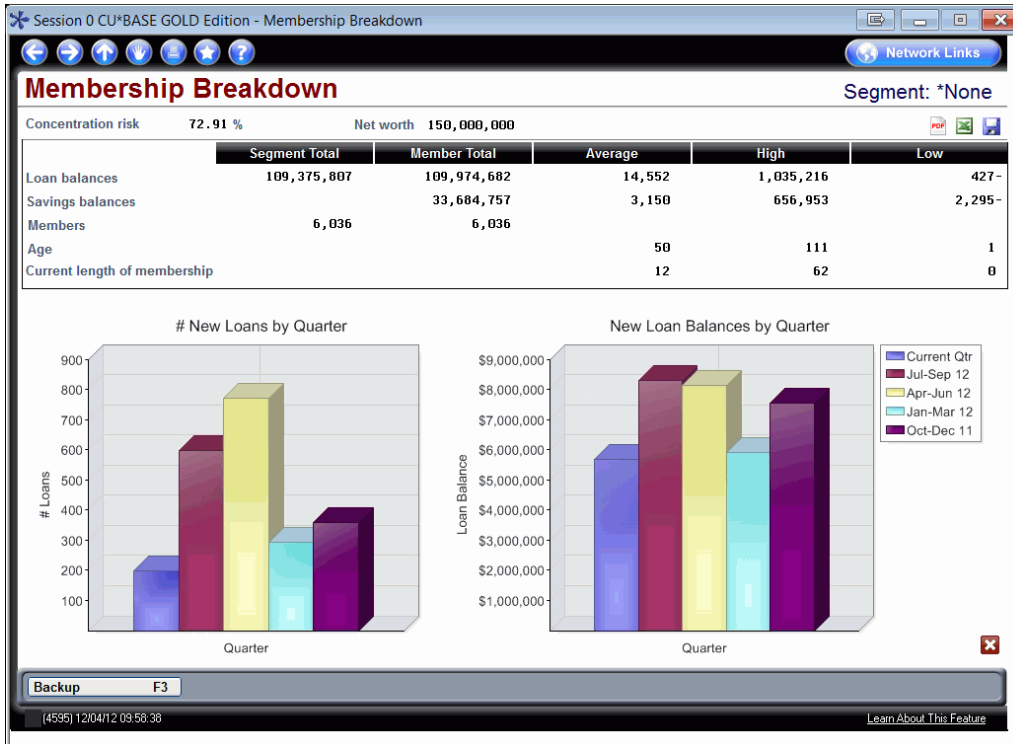
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## CEO and Auditing

### New Graphs Available for the Loan Concentration Risk Analysis


New graphs have been added to all three break-out analysis screens of the Loan Portfolio Concentration Risk dashboard. Now you can see graphical representation of the data appearing on the Member View screen.



Access this dashboard via the Management Processing/Dashboards menu: MNMGMT #19 or the Auditing menu: MNAUDT #15; then use F15-Summary to access the analysis section.

Select one of the breakout views and click  for a graphical representation of the data in each section.

*This programming change was made in response to a request from the CEO Strategies conference.*

 Details for all related screens will be available via CU\*BASE GOLD online help with the release.

## Accounting/Back Office



 Property Taxes Paid Added to Updated 1098 Form for Vendor Printing

As mentioned in the 2012 Year End Guide, IRS regulation changes for 2012 will result in the removal of Private Mortgage Insurance (PMI) premiums from the 1098 tax form. Because the space formerly used for that data is now unused, we have changed the 1098 vendor print file so that forms vendors can choose to print whatever is in the "Property tax paid" box in the Tax File for the account, along with an appropriate label. Forms printed by Sage Direct\* will include this information. If no data is filled in, that box on the form will remain empty.

Because of the variations in credit union configurations for escrow payees, we will not be automatically pulling information from your escrow distributions to populate this field. Use the Update Functions 1 menu: MNUPDT #18-Update IRS Tax File Information, making sure to enter 2012 as the tax year, and enter the amount in the "Property tax paid" field. Anything entered into this field will appear in box 4 on the 1098 form (assuming that one is produced for the member), but will NOT be reported to the IRS. You can begin this process immediately; you do not need to wait for the release to be implemented. Just remember that the final deadline when all data must be entered is still January 4, 2013.

Have a large number of mortgages with property tax? Contact a Client Services Representative for assistance. Depending on your configuration we may be able to run an automated routine just for you, or simply help you enter and verify the data before the end of the year.

**\*NOTE:** If you use a print vendor other than Sage Direct for your tax forms, the file they receive will contain the property tax data, but they will need to change their programs in order for it to be printed. We'll be sending all print vendors the new file specifications, but you will need to contact your vendor for details on their plans.

	Refer to the "Year End Processing" booklets (Online and Self Processing) available on the CU*BASE Reference Page for details. This document is currently available.
	Details for all related screens will be available via CU*BASE GOLD online help with the release.


 New Speed Sequences to Access OUTQs

Now there is easier access to all of the CU\*BASE OUTQs! New speed sequences have been added to for each OUTQ and are as follows:

- Speed Sequence OUTQA – go to archive (FICHExx) output
- Speed Sequence OUTQD – go to archive (DAILYxx) output
- Speed Sequence OUTQH – go to archive (HOLDxx) output
- Speed Sequence OUTQN – go to archive (NIGHTxx) output
- Speed Sequence OUTQP – go to archive (PRINTxx) output
- Speed Sequence OUTQS – go to archive (SAVExx) output

**Important: Your security officer must first give you access to these speed sequences.**

*This was implemented for online credit unions on September 27, 2012.*

	Details for all related screens will be available via CU*BASE GOLD online help with the release.
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## EFT

 Changes to Card/OTB Product Inquiry Screen

As part of our ongoing project to comply with PCI (Visa) standards for card # encryption and masking, we are now adding masking to the Cards/OTB Product Inquiry screen (F17-OTB/Cards from Inquiry). Specifically, if you click the edit button in front of any of the card types marked “batch processing” you are brought to the Member Plastics/OTB Products screen, and ATM and debit card numbers on that screen are now being masked. This matches the treatment on the equivalent inquiry screen used for online cards (click the edit button in front of items marked “online processing”).

**Attention Security Officers:** Any employees who need to be able to look up full, unmasked ATM and debit card numbers will need to be granted access to the ATM/Debit Card Maintenance feature (MNATMD #1). We recommend this be done now, even before the release is implemented, to keep things running smoothly for your MSRs next week.



Details for all related screens will be available via CU\*BASE GOLD online help with the release.