

Product:	Version #:	To be released to:	On date:
CU*BASE® GOLD	23.12	Online Credit Unions	December 10, 2023
		Self-Processors	December 17, 2023

Updated booklets will be posted on our website no later than:

December 8, 2023

This release includes changes to key database tables (files). **You must update your automated Queries** before their next scheduled run date!

See the separate Database Changes announcement for instructions.

Key to the symbols:

-  You'll see it immediately.
-  You'll need to activate it.
-  You'll need to work with a CSR to set it up.
-  There may be related fees; contact a CSR.

Included in this Release

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Email Updates and Changes

 **New Process for Updating FROM: Email Addresses, and More Changes Ahead**

Learn more in the Kitchen: [Email Policy Updates, Best Practices, and Compliance](#)

As you may be aware, we have been actively revising our policies and standards regarding management of the email addresses that credit unions use to deliver emails to their members. Following this, we will be implementing another change to aid in the further management of these addresses.

New Process to Request Changes to FROM: Email Addresses

Beginning December 10th (17th for self-processing credit unions) **Tool #233 Configure CU FROM Email Addresses** will be deactivated, and all credit union email address changes will be completed as a back-office configuration. These emails include your credit union general email address, loan status change, accounts payable approver notifications, and ACH payment advice emails. Note that at this time, **Tool #1900 Workflow Controls: Accounts Payable** still contains entry fields for your email addresses; any changes made here will update our back-office controls and will be heavily monitored for compliance until further changes can be made.

If your credit union wishes to use a custom domain for emails, such as *@mycreditunion.com*, or to make changes to an existing email on file, you can now request these changes, at no cost, [via the Store](#). In order to use your custom domain, our team must validate that the email meets the DNS requirements set forth by current regulatory and email provider standards. Once validated, the address(es) will be updated and your credit union will be notified. If your custom domain does not pass the required standards, a member of our Network Services team will be in contact to discuss options to resolution.

Changes to Temporary Member Reach Credit Unions

As a reminder, during our response to the Spamhaus incident, we placed credit unions into the Member Reach service as a temporary stopgap to quickly regain the ability to deliver mass email for all credit unions - this was not a permanent solution. **Credit unions who were temporarily utilizing the Member Reach domain, but are not Member Reach clients, will be moved to a new @creditunion-notifications.com domain before the end of December.** Your credit union name will be the sender, such as *myfavoritecreditunion@creditunion-notifications.com*.

Following this change, if you wish to subscribe to Member Reach services, contact Xtend. If you wish to update your email domain, follow the steps outlined [in the Store](#).

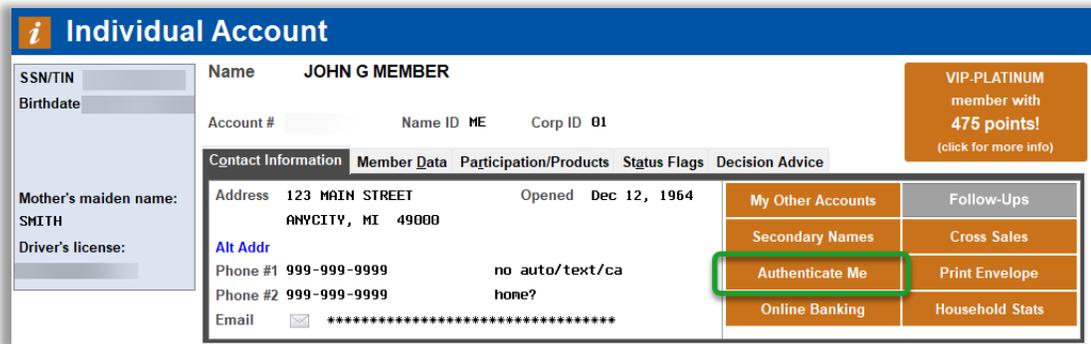
We are further evaluating our options with the upcoming policy changes. Our goal is to make any transitions or updates as simple as possible for everyone, while still performing the utmost due diligence in complying with the updated policies. We will continue to keep you up to date on changes through Client News, as well as in our email updates and best policies page [in the Kitchen](#).

Third-Party Authentication with MemberPass

Framework for MemberPass Integration on Member Service Screens

[Learn more in online help](#)

This release contains an exciting new integration with MemberPass, a third-party authentication service. Within Phone Operator, Inquiry, Secondary Names, Member Transfer, Xpress Teller, and Teller, you will now see a button labeled **Authenticate Me** (shown below in Phone Operator). At this time, the link will lead to the CU*Answers store for further information on credit union enrollment.



The screenshot shows a member service screen for 'JOHN G MEMBER'. It includes fields for SSN/TIN, Birthdate, and Mother's maiden name. A 'VIP-PLATINUM member with 475 points!' badge is visible. The 'Authenticate Me' button is highlighted with a green box.

Contact Information		Member Data	Participation/Products	Status Flags	Decision Advice	
Name	JOHN G MEMBER	Account #	Name ID ME	Corp ID 01	VIP-PLATINUM member with 475 points! (click for more info)	
Address	123 MAIN STREET ANYCITY, MI 49000	Opened	Dec 12, 1964	My Other Accounts	Follow-Ups	
Alt Addr		Phone #1	999-999-9999	no auto/text/ca hone?	Secondary Names	Cross Sales
Phone #2	999-999-9999	Authenticate Me			Print Envelope	
Email	*****	Online Banking			Household Stats	

Once your credit union has been enrolled in MemberPass, this link will launch a browser window, sending information about the credit union, the member account, and the person being served to the authenticate website. The site will check to see if the member has already enrolled for MemberPass (if not, enrollment options will be displayed). If the member is already enrolled, the site will activate the authentication process, which sends a message to the member's phone.

More information on enrollment will be available soon, so be sure to follow along in [the Kitchen](#).

Additional Enhancements and Updates

Shared Branching Transfers in Phone Operator to Follow Per Member Flag

[Learn more: online help](#)

We have made an update to the Phone Operator shared branch transfer feature, to follow the member's specific *Allow shared branch transactions* [configuration](#) flag on the member record, in lieu of following the general *Allow shared branch phone transfers* [configuration](#) in **Tool #814 Shared Branch Configuration**.

Previously Released

Ascensus IRAdirect Integration

Learn more: [online help](#)

If your credit union is using Ascensus for managing your IRA/HSA accounts, our recent integration to the Ascensus IRAdirect express toolkit provides a link between CU*BASE and the Ascensus IRAdirect when an employee opens an IRA account, or an IRA transaction is performed.

This integration will help streamline your operations when performing IRA transactions in CU*BASE, because there will be no need for re-keying your member's data into Ascensus. After completing the necessary actions in CU*BASE, the CU employee will be brought forward to the Ascensus IRAdirect site to complete any paperwork or forms that need to be completed.

For more information on the project check out the [Kitchen page](#) or [visit the Store](#) to get started.

End