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CU*BASE Tracker System to Include Non-Members

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In order to facilitate storing the results of OFAC scans, FinCEN scans, and other routine activity done on non-member joint owner, co-borrower, and beneficiary records, CU*Answers is designing an expanded Tracker system to include non-members.

The Member Tracker system in CU*BASE is a helpful and easy-to-use tool to help credit union staff keep on top of important requests and issues. Tracker records can contain reminders to contact a member, follow-up on payments due, schedule and appointment and more. These records remain attached to a member's account until manually purged; therefore serve as excellent documentation about an issue for future reference. For this reason, Trackers are used to document member activity related to compliance. Each time a compliance related event such as an OFAC scan, FIDM scan occurs, the CU*BASE system automatically adds a conversation to the member's audit tracker – these ongoing conversations are recorded, and at a later date can be reviewed as a record of activity on the account.

The addition of the Tracker System to include non-member records will assist credit unions in proving to examiners that OFAC scans, and other activities were run on non-members.

About CU*Answers

CU*Answers was founded over 35 years ago and is a 100% Credit Union owned CUSO located in Grand Rapids, Michigan. CU*Answers offers a wide variety of services for credit unions including its flagship CU*BASE Processing System in both an Online (ASP) and In-house environment, Internet Development Services featuring the **It's Me 247** Online Banking product, Member Check Processing and Direct Deposit processing services. CU*Answers provides combined services to 165 credit unions nationally representing nearly 1.5 million members and \$10 billion in credit union assets. For more information about how "We Make Credit Unions Go" please visit CU*Answers at www.cuanswers.com.

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