

CU*Answers Integration with MemberPass Getting Started Guide

Introduction

This guide is to help your staff understand the CU*Answers integration with MemberPass. Read this guide carefully to understand how to use the product and prepare staff to help members enroll on their cell phones.

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What is MemberPass? Using the **Authenticate Me** Button in CU*BASE

MemberPass is a new third-party authentication integration with CU*BASE that allows credit union staff to validate a member's identity using their cell phone. The **Authenticate Me** button is available in CU*BASE [Inquiry](#), [Phone Operator](#), [Xpress Teller](#), [secondary names](#), and the [member transfer](#) screen. Staff can begin the process by simply clicking the **Authenticate Me** button in any of these areas. This button launches the MemberPass authentication screen, where staff can enroll members in the process or quickly authenticate previously enrolled members.

Enroll a member: After selecting **Authenticate Me** and moving to the subsequent web browser screen, select the *Enroll* button and enter the information. This will begin the process by sending the member a text message; the member can then click on the link in the text message and agree to the process to opt in. Once authenticated, the credit union user gets a message that the member is authenticated.

Authenticate a previously enrolled Member: After using the **Authenticate Me** button, on the subsequent browser screen simply click *Authenticate* next to a phone number that was previously enrolled to initiate a text message to the member. The member following the link in the text message to authenticate. Once the process is complete the credit union user gets a message that the member is authenticated.

Member Requirements

Requirements for Activation

- The member must have a mobile phone that supports,
 - text messaging
 - internet browsing
 - access to a mobile or Wi-Fi network
 - biometric authentication - this means that the member will need to have a lock screen activated by using a code, face recognition, or fingerprints
 - And a supported cell phone browser: Safari(iOS), Chrome, or Firefox
- Note that landline phones are not supported.

How Credit Union Staff Uses MemberPass: Authenticate Me


In CU*BASE, select the member in the following processes;

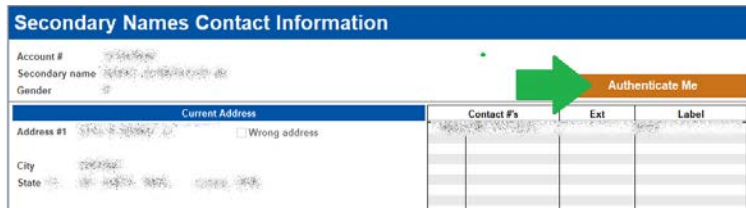
Phone Operator/Inquiry

To verify a member, click the **Authenticate Me** button in the *Contact Information* tab.

The screenshot shows the 'Individual Account' page in CU*BASE. The page is divided into several sections. On the left, there is a sidebar with fields for 'SSN/TIN', 'Birthdate', 'Mother's maiden name', and 'Driver's license'. The main content area displays member information including 'Name', 'Account #', 'Address', 'Phone #1', 'Phone #2', and 'Email'. A green arrow points to the 'Authenticate Me' button in the 'Contact Information' tab. Other buttons visible include 'My Other Accounts', 'Secondary Names', 'Online Banking', 'Follow-Ups', 'Cross Sales', 'Print Envelope', and 'Household Stats'. A 'BRONZE member with 0 points!' badge is also present.

Secondary Names via Phone/Inquiry

To verify a joint member, select *Secondary Names* and  next to the member you're serving. Then click **Authenticate Me**.



Secondary Names Contact Information

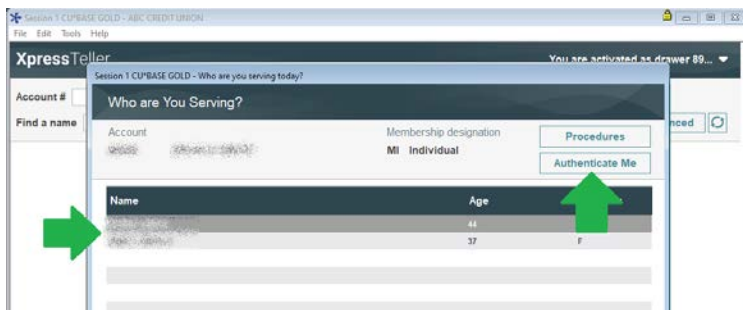
Account # [redacted]
Secondary name [redacted]
Gender [redacted]

Authenticate Me

Current Address	Contact #'s	Ext	Label
Address #1 [redacted] <input type="checkbox"/> Wrong address			
City [redacted]			
State [redacted]			

Xpress Teller

Access **Tool #1600 Xpress Teller**. Select the member you're serving and click **Authenticate Me**.



Session 1 CU/BASE GOLD - Who are you serving today?

Xpress Teller You are activated as drawer 89...

Account # [redacted]
Find a name [redacted]

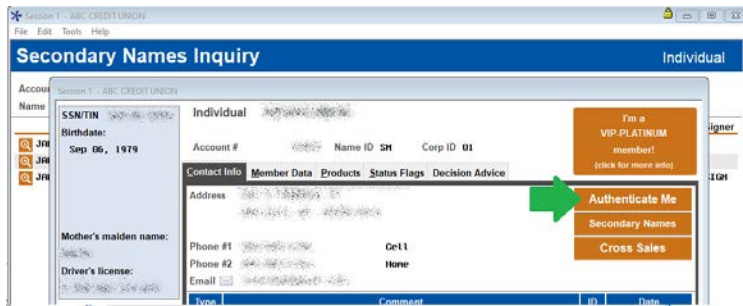
Membership designation: MI Individual

Authenticate Me

Name	Age	
[redacted]	41	
[redacted]	37	F

Standard Teller

On the *Verify Member* screen, select **Authenticate Me**.



Session 1 - ABC CREDIT UNION

Secondary Names Inquiry Individual

Account # [redacted]
Name [redacted]
Birthdate: Sep 06, 1979


Authenticate Me

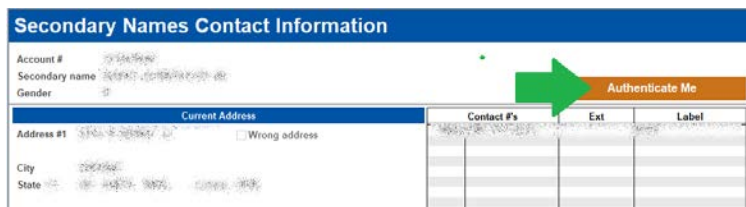
Secondary Names

Cross Sales

Address	Phone #1	Phone #2	Email
[redacted]	[redacted]	[redacted]	[redacted]

Secondary Names via Teller

To verify a joint member, select *Secondary Names* and  next to the member you're serving. Then click **Authenticate Me**.




Secondary Names Contact Information

Account # [redacted]
Secondary name [redacted]
Gender [redacted]

Authenticate Me

Current Address	Contact #'s	Ext	Label
Address #1 [redacted] <input type="checkbox"/> Wrong address			
City [redacted]			
State [redacted]			

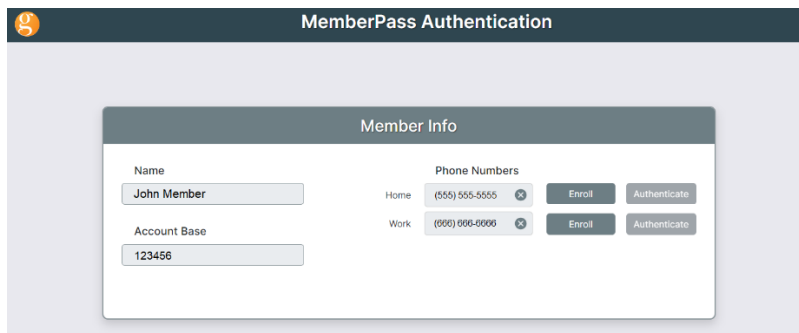
Member Transfer

Access **Tool #516 Member Account Transfer**. Enter the *From account* and the *Transfer amount*, then select *Verify Member*. On the *Verify Member* screen, click **Authenticate Me**. To verify a joint member, click *Secondary Names* and  next to the member you're serving. Then click **Authenticate Me**.



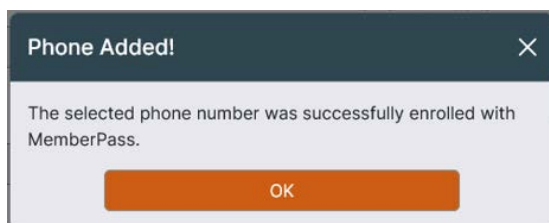
Moving to MemberPass Authentication

Once on the MemberPass Authentication website, enroll a member by clicking *Enroll* or if the member is already enrolled, click *Authenticate* next to the phone number they want to use. Both options will send the member a text message to start the process on their end.

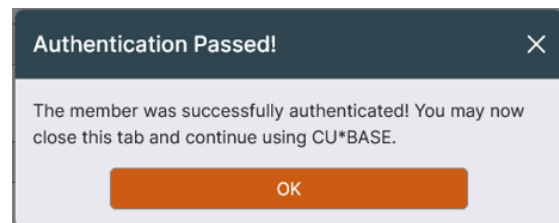


Your member will receive a text message with a link to enroll or authenticate themselves. For more information on how the member enrolls or authenticates go to Member Authentication section.

After the member finishes enrollment or authenticating themselves, it will display a message in the MemberPass Authentication site.



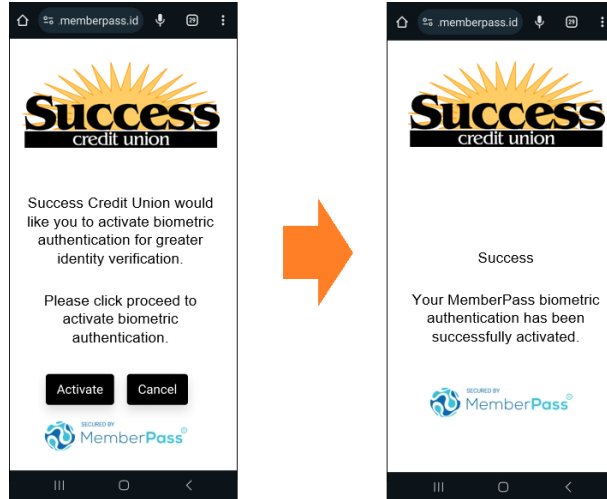
Enrollment Message



Authentication Message

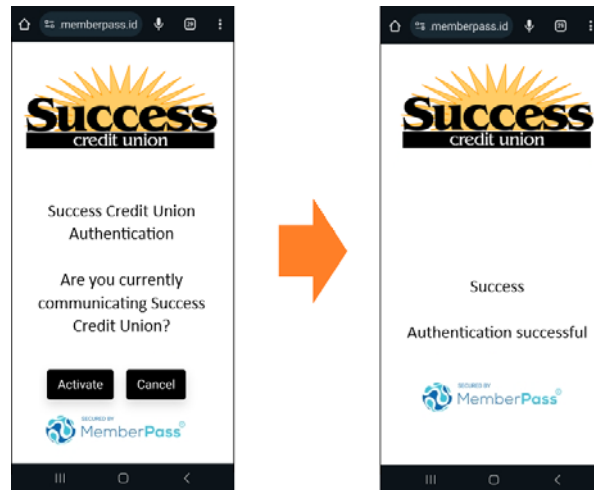
Member Enrollment Process

After the member clicks the link in the text message, a web browser will open with the following screens displayed. The member will then need to select *Activate* to enroll this device to their phone.



Member Authentication After Enrollment

After the member clicks the link in the text message, a web browser will open with the following screens displayed. The member will select *Activate* to send the message to the credit union verifying themselves.



Special Considerations and Recommendations

This is great new tool to authenticate your member! However, with all tools, they only work for certain jobs. Be prepared when this tool doesn't work and make sure your staff is ready to start the next authentication method in case of the follow issues...

- Technology issues
 - Cell phone does not support the feature
 - Does not support Biometric authentication or its not enabled

- Does not support web features
- Does not support texts
- Text is not being received in a timely manor
- The website is having communication issues
- Human Issues
 - Member does not have a cell phone
 - Member does not have their cell phone on them
 - Member doesn't want to use the product

How to get Support

If you have questions or are having issues with MemberPass

Call - 616-285-5711 x255

AnswerBook: <https://kb.cuanswers.com/cuanswers>