

CU*Answers Integration with MemberPass Getting Started Guide

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

MemberPass is a 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 the CU*BASE [Inquiry](#), [Phone Operator](#), and [Xpress Teller](#) tools as well as the [Secondary Names](#) and [Member Transfer](#) screens. 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 refers to a lock screen activated by using a code, face recognition, or fingerprints
 - a supported cell phone browser: Safari (iOS), Chrome, or Firefox
- Note that landline phones are not supported.

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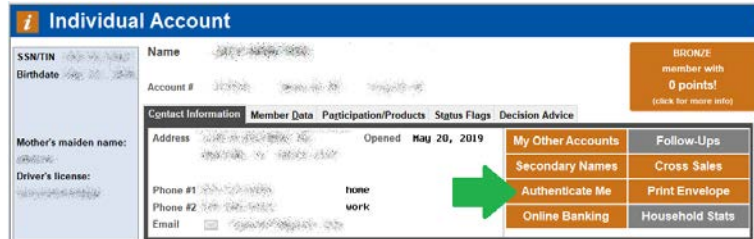
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How Credit Union Staff Uses MemberPass: Authenticate Me

Credit union staff can access MemberPass through the following processes in CU*BASE:

Phone Operator/Inquiry

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



Individual Account

SSN/TIN: [REDACTED] Name: [REDACTED] BRONZE member with 0 points! (click for more info)

Birthdate: [REDACTED] Account #: [REDACTED]

Member Data: Opened May 20, 2019

My Other Accounts | Follow-Ups


Secondary Names | Cross Sales

Authenticate Me | Print Envelope

Online Banking | Household Stats

Phone #1: [REDACTED] home
Phone #2: [REDACTED] work
Email: [REDACTED]


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]

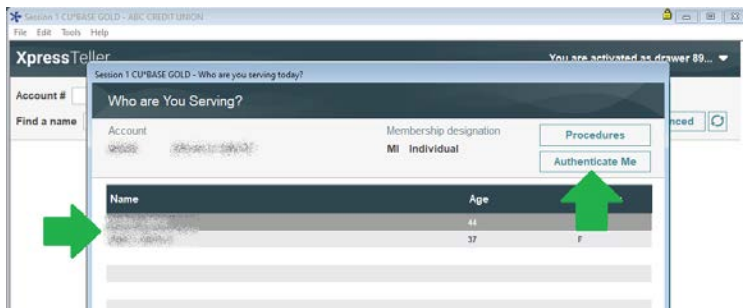
Secondary name: [REDACTED]  **Authenticate Me**

Gender: [REDACTED]

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 - ABC CREDIT UNION

Xpress Teller

Who are You Serving?

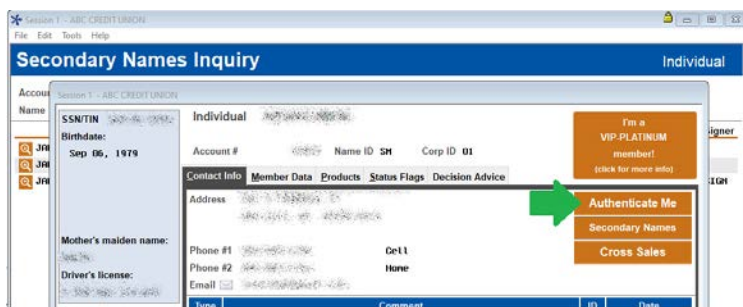
Account #: [REDACTED] Membership designation: MI Individual

Procedures | **Authenticate Me**

Name	Age	Sex
[REDACTED]	44	F
[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 ID: SN Corp ID: 01

Individual: [REDACTED]

Member Data: [REDACTED]

Products: [REDACTED] Status Flags: [REDACTED] Decision Advice: [REDACTED]

Address: [REDACTED] **Authenticate Me**

Phone #1: [REDACTED] Get 1
Phone #2: [REDACTED] Home
Email: [REDACTED]


Secondary Names | Cross Sales


SSN/TIN: [REDACTED] Birthdate: Sep 06, 1979

Mother's maiden name: [REDACTED] Driver's license: [REDACTED]

I'm a VIP-PLATINUM member! (click for more info)

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]


Current Address Wrong address

Address #1 [redacted]
 City [redacted]
 State [redacted]

Contact #'s	Ext	Label

Authenticate Me

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**.



Member Account Transfer Journal Transfers (No fee)

From: SSN/TIN [redacted]
 To acc: [redacted]
 Description: [redacted]
 Print: [redacted]
 Options: [redacted]
 Name: [redacted]

Individual [redacted]

Account # [redacted] Name ID SH Corp ID 01

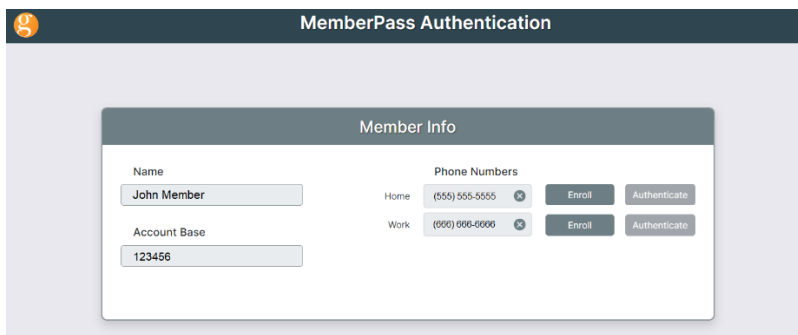
Authenticate Me
 Secondary Names
 Cross Sales

Address [redacted]

Phone #1 [redacted] Dell
 Phone #2 [redacted] Home
 Email [redacted]

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 authentication process on their end.



MemberPass Authentication

Member Info

Name:

Account Base:

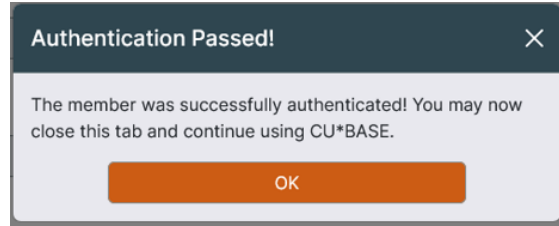
Phone Numbers:

Home	(555) 555-5555	<input type="button" value="Enroll"/>	<input type="button" value="Authenticate"/>
Work	(666) 666-6666	<input type="button" value="Enroll"/>	<input type="button" value="Authenticate"/>

The member will receive a text message with a link to enroll or authenticate themselves. When the member responds on their mobile device, the employee will see one of the following confirmation messages in the MemberPass Authentication site.



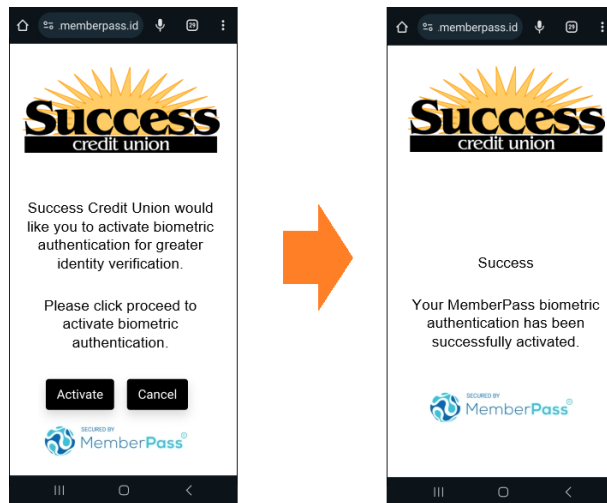
Enrollment Message



Authentication Message

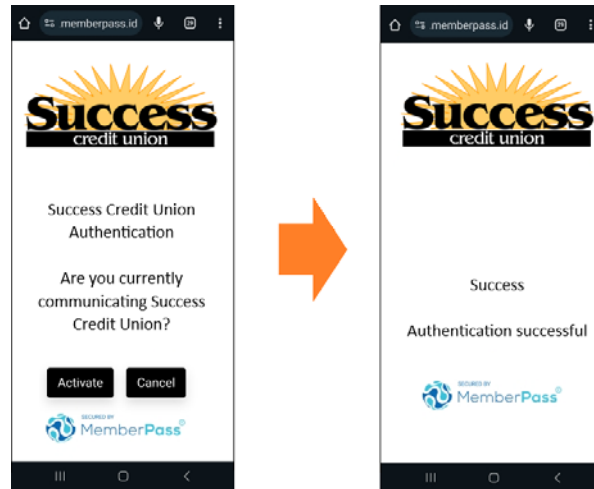
Member Enrollment Process

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 tool to authenticate your members! Be prepared for when this tool doesn't work and ensure your staff is ready to start the next authentication method in case of the following issues...

- Technology issues
 - Member's cell phone does not support:
 - biometric authentication
 - web features
 - texts
 - Texts are not received in a timely manner
 - 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

Reach out to us through AnswerBook: <https://kb.cuanswers.com/cuanswers>