

CU*Forms Update Coming July 13th, 2025







On July 13th, 2025, there will be a new version of CU*Forms giving your credit union a new set of features.

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
Date Fields Now Support “Click to Date”!

Members no longer need to sign every date spot on forms with the signature pad. We've added the ability to simply click your mouse to apply today's date to “date signed” boxes when signing in-branch. This can save time during the signing process and ensure the correct date is applied. This will be the default moving forward, but if you choose not to use this feature, you can turn it off and still have the member sign the date manually.

The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.			
			
Primary Signature	Date	Joint Signature	Date
			
		Joint Signature	Date

Added "Archive Supporting Documents" Feature to Membership FormFLOW

Just like in the Lending FormFLOW, you can now auto-archive documents—like a member's credit report—with the click of a button. To add this, go to the FormFLOW Configuration for memberships and add the new step type, “Archive Supporting Documents”.

Step Type Archive Supporting Documents			
Documents to Request:			
Archive Table	Document Type	Document Name	Required
Member_Forms	Audit Summary Document	CUForms Membership FormFLOW Audit Summary Document	<input type="checkbox"/> 
Member_Forms	Member Credit Report	Member Credit Report	<input type="checkbox"/> 
Add Document			
Show a “To Do” checkbox next to this step.			
Would you like this step to be audited? (If Review step is present)			
<input type="checkbox"/> 			
Would you like to send a notification when this step is marked done?			
<input type="checkbox"/> 			
Cancel			Add

Validate “Amount Financed” Matches Total Dollar Amount on Loan Notes

Many credit unions asked for the return of field validation for the Amount Financed of a loan. They wanted to ensure their staff entered the correct dollar amounts on the forms. As you can see below, your staff is now prompted to correct the dollar amounts if they do not match the loan's amount financed. We also now allow the programming of the “amounts paid to others” fields, pulling in the loan disbursement instructions entered into CU*BASE.

Example of not matching

Credit Union: Chief Financial Federal Credit Union	Acct No. 234322343	Loan No.
Expected Value: 4500 Actual Value: 4318.44 Difference: 181.56		
ITEMIZATION OF THE AMOUNT FINANCED ('e' means an estimate)		
Amount Financed of	Amount Given to You Directly	Amount Paid on Your Account
\$4,500.00	\$0	\$2000.00
		Prepaid Finance Charge
		\$365.32
Amounts Paid to Others on Your Behalf: (If an amount is marked with an asterisk (*) We will be retaining a portion of the amount.)		
<input type="checkbox"/> \$400.00	To Doug Sample	<input type="checkbox"/> \$
<input type="checkbox"/> \$453.12	To John Doe	<input type="checkbox"/> \$
<input type="checkbox"/> \$500.00	To CU*Answers	<input type="checkbox"/> \$
<input type="checkbox"/> \$600.00	To Law 2 Grow	<input type="checkbox"/> \$
<input type="checkbox"/> \$	To	<input type="checkbox"/> \$
<input type="checkbox"/> \$	To	<input type="checkbox"/> \$
<input type="checkbox"/> \$	To	<input type="checkbox"/> \$

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Credit Union: Chief Financial Federal Credit Union	Acct No. 234322343	Loan No.
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<input type="checkbox"/> \$181.56	To Two Food Too Good	<input type="checkbox"/> \$
<input type="checkbox"/> \$	To	<input type="checkbox"/> \$
<input type="checkbox"/> \$	To	<input type="checkbox"/> \$

Configuration of this process can be done in the CU*Forms form building screen. This validation process only works for the CUBASE field 'Loan – Amount Financed.' Click the 'Validate Field' checkbox to enable the fields you want to validate on the form. Then, simply select each field you need to validate and place it in the form input boxes. You can add or remove these boxes as necessary.

Edit Field

Field Name:

ITEM_AMTFIN_7AAB

Field Type:

Text

CU*BASE Field:

Loan - Amount Financed

Formatter:

Default (12,345.67)

Role:

Member/Applicant

Default Value:

Field Locked:

☐

Required for Staff:

☐

Validation

Validate Field:

☒

+/-

Form Input

+

AMT_GIV_DIR_7AAB

-

+

AMT_PAID_7AAB

-

+

PREPAID_FIN_7AAB

-

+

AMT_OTHER_3_7AAB

-

+

AMT_OTHER_2_7AAB

-

+

AMT_OTHER_5_7AAB

-

E-Sign

Send for E-Sign:

☐

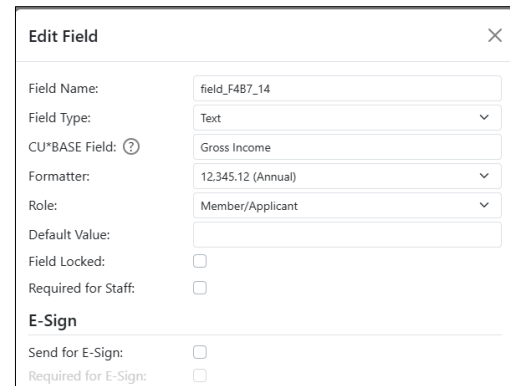
Delete Field

Cancel

Save

Added Daily, Weekly, Monthly, and Yearly Formatters to Annual Income.

The "Gross income" field now includes options for daily, weekly, monthly, and yearly selections. This can be configured in the Forms Admin pages during template creation.



The screenshot shows the 'Edit Field' configuration window for a field named 'field_F4B7_14'. The configuration includes the following options:

- Field Name: field_F4B7_14
- Field Type: Text
- CU*BASE Field: Gross Income
- Formatter: 12,345.12 (Annual)
- Role: Member/Applicant
- Default Value: (empty)
- Field Locked: ☐
- Required for Staff: ☐
- E-Sign section:
 - Send for E-Sign: ☐
 - Required for E-Sign: ☐

Automatically Generate Denial Notices for Both Applicants

Previously, when generating a denial notice, it would only create one for the loan applicant. We have changed this process so it will now automatically generate notices for both the applicant and co-applicant, giving you the ability to sign, print, or send for eSign to both parties. This will automatically work for anyone using the CU*Answers generic denial notice. If you are using a custom one, please reach out to imaging@cuanswers.com to make the adjustment to your form.

Wire Fields Temporarily Removed from CU*Forms

Wire fields didn't work quite as we'd hoped. We're re-evaluating our approach to make the process more efficient and effective for both your members and staff. If you have any ideas or feedback, please reach out to us—we'd love to chat!

New CU*BASE Form Fields Available

With this update, your credit union now has access to more form fields to make using CU*Forms even better. These are most of the fields that we were missing to support loan applications and notes. We fully anticipated that we missed some, so please reach out to imaging@cuanswers.com if you find a field that you think we should add. Below is a full list of new fields:

- Previous City
- Previous State
- Previous Zip Code
- Debt Frequency
- Has One of Dividend Products
- Has One of CD Products
- Has One of Loan Categories
- Loan - Has One of Debt Protections