**Change Address Config Worksheet – BANNO.CHANGE.ADDR.V1.POW**

This worksheet can be used to determine how the parameter settings (configuration) Letter file for the change of address PowerOn needs to be set up for the desired functionality. These values can then be transferred over to the program’s configuration Letter file (BANNO.CHANGE.ADDR.V1.CFG) or, attached to the case should you decide to have Jack Henry install the program for you. Should you need any additional information or desire assistance in completing this form, please reach out to your JHA customer service rep.

**Ineligible Account Types**

If the member’s account is one of these types, the program will send the member’s address change request to conversations instead of updating the address directly. List the ineligible account types or “none” for all account types to be eligible.

Ineligible account types: Click or tap here to enter text.

**Account Warning Code(s) to Exclude**

If the member has one of these account level warning codes, the program will send the member’s address change request to conversations instead of updating the address directly. List the account level warning codes or “none” for the program to ignore account warning codes.

Account Warning Code(s):Click or tap here to enter text.

**Clear Warning Type**

If the address update is successful, the program will clear this single account level warning type. Enter the warning type or “none” if the program does not need to clear a warning.

Clear warning type: Click or tap here to enter text.

**Set Warning Type**

If the address update is successful, the program will set this single account level warning type. Enter the warning type or “none” if the program does not need to set a warning.

Set warning type: Click or tap here to enter text.

**Set Warning Expiration Days**

If the program will be setting an account level warning (see ‘Set Warning Type’ above), what expiration date should it set the warning for? You can enter a number > 0 or “none” if no expiration date should be set in the warning.

Warning expiration days: Click or tap here to enter text.

**PO Box Restrict**

Would you like to restrict the user’s street address input from including a PO box?

YES or  NO *(check one – default is ‘YES’)*

**PO Box List**

If you’ve opted to have the program limit the user from entering a PO Box in the street address field, you’ll need to list the PO Box phrases the program should check for. All phrases will be forced to uppercase when comparing. You can enter up to 20 different phrases. For example: ‘PO Box’, ‘P.O. Box’, ‘Post Office Box’, ‘P.O.Box’, ‘PO. Box’, etc.

|  |  |
| --- | --- |
| PO Box List 01: Click or tap here to enter text.  PO Box List 02: Click or tap here to enter text.  PO Box List 03: Click or tap here to enter text.  PO Box List 04: Click or tap here to enter text.  PO Box List 05: Click or tap here to enter text.  PO Box List 06: Click or tap here to enter text.  PO Box List 07: Click or tap here to enter text.  PO Box List 08: Click or tap here to enter text.  PO Box List 09: Click or tap here to enter text.  PO Box List 10: Click or tap here to enter text. | PO Box List 11: Click or tap here to enter text.  PO Box List 12: Click or tap here to enter text.  PO Box List 13: Click or tap here to enter text.  PO Box List 14: Click or tap here to enter text.  PO Box List 15: Click or tap here to enter text.  PO Box List 16: Click or tap here to enter text.  PO Box List 17: Click or tap here to enter text.  PO Box List 18: Click or tap here to enter text.  PO Box List 19: Click or tap here to enter text.  PO Box List 20: Click or tap here to enter text. |

**Name Level Matching**

Enable Name Level Matching to override tracking 8 linking to the account level names. Name matching will find all the allowed name records with an address that matches the one the user sees in Banno settings and changes them all at once. Select “None” in the left column to deactivate name matching and use tracking 8 linking. To enable, select the account levels allowed in the right column.

|  |  |  |
| --- | --- | --- |
| None (Deactivated) | Activated | |
|  | Account Names | Share Names |
|  | IRS Names | Loan Names |
|  | Pledge Names | Card Names |
|  | EFT Names | External Loan Names |

**Match Name Types**

If Name Level Matching is enabled, Match Name Types ***must*** be set. Enter a numeric list of the name types that can be updated with the new address if matched. See below for a complete list of name types and the associated numeric value. Valid values are ALL or a list (e.g. 0-2,4,6-17).

Match Name Types: Click or tap here to enter text.

**Available Name Types (as of Episys Release 2020.00)**

|  |  |  |  |
| --- | --- | --- | --- |
| **Numeric Value** | **Description** | **Numeric Value** | **Description** |
| 0 | Primary | 16 | Guarantor |
| 1 | Joint | 17 | Loan Co-Maker |
| 2 | Mailing Only | 18 | Loan Co-Applicant |
| 3 | Alternate Mailing | 19 | Trustor |
| 4 | Beneficiary | 20 | Co-Borrower |
| 5 | Custodian | 21 | Co-Signer |
| 6 | Trustee | 22 | CTR Owner Address/ID |
| 7 | Responsible Individual | 23 | CTR Transactor |
| 8 | Power of Attorney | 24 | DBA |
| 9 | Authorized Signer | 25 | Attorney Trust |
| 10 | Dividend Payee | 26 | Safe Deposit Box Co-Lessee |
| 11 | Maturity Payee | 27 | Safe Deposit Box Deputy |
| 12 | Coverdell ESA Beneficiary | 28 | CTR Common Carrier |
| 13 | Next of Kin | 29 | Property Address |
| 14 | Representative Payee | 30 | Successor In Interest |
| 15 | Grantor | 31 | Information Only |

**Test Account List**

Entering any data here will activate test mode. When in test mode, this list of accounts will have the most recent changes in effect. List the account numbers by entering all 10 digits (including leading zeros) separated by comma.

Test Account List: Click or tap here to enter text.

**Send Email**

If this is enabled a confirmation email will be sent to the member. Valid Values are: YES or NO

Send Email: Click or tap here to enter text.

**Email Type**

If the send email is enabled, this identifies the format that should be used for the email. Valid Values are: TEXT or HTML

Email Type: Click or tap here to enter text.

**Send Email From**

If the send email is enabled, this identifies the source of the email (the “FROM” email). Valid Values are: [valid email address] or blank. (If blank, the member’s own email address is used.)

Send Email From: Click or tap here to enter text.

**Email Subject**

If the send email is enabled, this identifies the subject line for the email. Valid Values are: Character String up to 120 characters or blank. (If blank, ‘Address Update Notice’ is used.)

Email Subject: Click or tap here to enter text.

**Email Body**

If the send email is enabled, this text will be the body of the email sent to the member. Valid Values are: Text lines up to 999 with up to 120 characters per line

Email Body: Click or tap here to enter text.