

Householding Automation

This program allows you to assign members living at the same address to a household, without needing to send data to another system. Runs directly on your Spectrum system allowing for greater speed and accuracy than available with other solutions. Once accounts are assigned to a household, defined criteria is used to assign a head of household.

Features

- First, accounts are assigned to a household by:
 - Matching on address information after it has gone through the conversion table
 - The conversion table allows removal of all blanks, change “Street” to “ST”, remove vowels, etc., to increase accuracy of matching
 - System can be set to only household accounts where the last names match
 - Assign multiple accounts to same household only if SSNs match
 - The process can be tagfile driven to allow control over accounts to be processed
 - Ability to place a limit on the number of accounts that can be assigned to a single household. One limit causes the accounts to show on an exception report, the next limit causes all accounts in that household to automatically be assigned separate households, and to show on an exception report
- Then, a Head of Household is assigned:
 - The head of household can be assigned based on a number of different criteria that is controlled by the credit union:
 - Aggregate share and loan balance
 - Aggregate share balance
 - Aggregate loan balance
 - Aggregate balance of a specific set of share products
 - Aggregate balance of a specific set of loan products
 - Definition of a series of share and loan products in order of priority
 - Assign based on birth date
 - Assign based on lowest account number
 - Exclude accounts with age under 18 from being head of household, unless they are the only account or oldest account in the household
- Reports:
 - Report of all assignments – available in summary or detail format
 - Report of all exceptions

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