

# CU\*ANSWERS Project Release Planning Last revised: April 5, 2023

This list shows major projects in the pipeline for upcoming releases for CU\*Answers software products, including CU\*BASE®; It's Me 247 online, mobile, and text banking; CU\*Talk; UCI middleware solutions; Imaging Solutions products; Analytics Booth; and other CU\*Answers software products. Releases may also contain a number of minor modifications not outlined here.

All release dates and projects listed are **tentative and subject to change**, and we reserve the right to delay slated projects based on QC test results.

KEY TO RELEASE NUMBERS

Sample: **XXX.16.03.01**

XXX represents the team/product\*  
 16 represents the year (2016)  
 03 represents the month (March)  
 01 represents a sequence number  
 \*Not used for CU\*BASE releases

## 2023 Releases

### 2023 CUBASEPTF → CUBASE Annual Merge

January 29, 2022

CU\*Answers and Site-4 Online CUs Only

Product:	CU*BASE	
Release #:	23.05	
Release type:		
Beta clients:	Kellogg and Parkside CU, New client Scient will need to go on beta level for 5/1 conversion	
	Determine release content	Jan 31
	Beta-selection period	Feb 14-Feb 28
	<b>Technical Release Review</b>	<b>Feb 28</b>
	Beta training	Mar 23
	Beta start	<b>Mar 26</b>
	Tool database blackout	Mar 17-May 7
	Release summary to CUs	Apr 17
	Client training	April 25, May 2
	<b>Release to Online CUs</b>	<b>May 7</b>
	Release to Site-Four	May 7
	Release to Self Processors	May 21

Proj#	Description
55259	Allow credit card cash back by MCC group
55349	Internal flood tool for interface type for Bill pay
55597	New tool for Expensing credit card payments to A/P vendors
55727	New Bill Pay/P2P Vendor GL configuration
55753	New table to track EFT vendor contact information
55799	Revamp Accounts Payable invoice creation process
56039	Credit Card Cash Back Expense Estimator
56251	Update AFT maintenance to use 4 digit field to avoid pivot year conflicts
56299	Notice change to always show last payment amount in notice field
56556	Updates to Written Off Loan Dashboard for tracking recoveries
56802	Filtering Product Rate boards for BizLink 247 vs Its Me 247 vs My Biz
56948	Enhancements to deposit holds for large deposits
57215	New Preview Escrow Analysis Dashboard
57301	New access points for CLR Path Decision model
57638	Xpress teller enhancement for check printing at multiple branches and user-defined check type
57639	New global #days setting for credit reports
57728	OPER configuration for card Optics retention in a data warehouse
57753	Temporary increase of debit card limits

Proj#	Description	
58103	Change the shared branch transfer screen to emulate phone transfer with available balance verbiage and par value logic	
58129	Enhancements to Savings/checking account opening	
58132	Separation of Branch and corporate ID maintenance from chart of accounts	
58311	Add P2P enrollment status to online banking screen (PITT)	
58314	New Smart Link to request document from loan application screens	
58328	Expand Coop shared branching holds for other check types	Ready
58331	New Wire Transfer copy feature	
58337	Create new tool to work ACH exceptions (PACHSU) with invalid account numbers	
58591	Expand share secured loans via online banking to checking products	
58745	Add Two Factor Authentication for personal information in It's Me 247	
58865	Consolidated 5300 reports over multiple credit unions	
59017	New Deferred Loan Indicator on participation loans	
59065	Update search feature on GL batch inquiry	
59074	New view only option to see credit union vendors/processors and services	
59344	Add eDOC CU ID to the CU master profile maintenance	
59539	Add an optional y/n flag to Tool #659 Print Loan Statement Notices to mask account numbers when printing	
59791	Internal adjustment to add additional process types to Dex driver	
59804	Add ability to assign default approval ID to 1 Click Loans	
60112	Contract Variable rate change for payment recalculations on MEMBER6 loans	
60196	Add create forms button in GOLD	
60307	Add the alternate address indicator to the teller screen similar to other PITT screens	
60422	Change to sort tracker review by date with most recent first	
60744	New overlay for Risk-based pricing forms	
60762	Screen changes for future 1 Click enhancement for multiple forms	

Targeted/planned for this release but not yet confirmed as feasible:

Proj#	Description
58388	Table and configuration changes for Digital issue

<b>Product:</b> <b>Analytics Booth</b>	Determine release content	Jan 13
	Release Summary to CUs	June 6
<b>Release #:</b> <b>AB_23.06</b>	Release Summary to CUs (Reminder)	<b>June 13</b>
	Client Training (Pre-release)	June 14
	Release to all AB Subscribers	<b>June 25</b>
	Client Training (Post Release)	June 28
Beta clients:		

Proj#	Description
56452	Upgrade Power-Lines
59362	Cleanup procedure for called powerlines
59363	Cleanup procedure for called web version
60465	Give Trends landing page new look and feel
60466	Give Trends preferences page new look and feel
60467	Give Trends favorites page new look and feel
60695	Consume new Delinquency data coming from CU*BASE
60696	Add additional reporting by Trends Category
60752	Add missing percents to Loan Portfolio screen
60958	Redesign the Trends Learn-from-peer analysis to new charting and styling

<b>CU*BASE</b>		Determine release content	June 27
		Beta-selection period	July 18-Aug 1
		<b>Technical Release Review</b>	<b>Aug 1</b>
		Beta training	TBD
<b>23.10</b>		Beta start	<b>Aug 27</b>
		Tool database blackout	Aug 17-Oct 8
		Release summary to CUs	Sept 18
		Client training	TBD
Release type:		<b>Release to Online CUs</b>	<b>Oct 8</b>
		Release to Site-Four	Oct 8
		Release to Self Processors	Oct 15
Beta clients:			

Proj#	Description
59111	Enhancements to Cash Inventory features for teller and vault

Targeted/planned for this release but not yet confirmed as feasible:

Proj#	Description
52088	Re-write out-of balance report
55258	Allow Card activity rebates by MCC group
55260	Credit Card promotions based on MCC group
55403	Enhancements to ACH Posting Controls
55639	Online LOS Improvements Part 1: Managing the Loan Queue
56230	New IRA Direct integration with Ascensus
56308	Update logic for handling credit scores displayed to members in Its Me 247
56725	New tool to force post Credit Card Debit exceptions
57640	Receipt Printing Control enhancements
58012	Marketing Club Enhancements
58071	Batch account adjustment posting
58074	New Option to pay escrow analysis surplus funds by check
58075	Add separate card order address captured and stored with card order
58121	1Click Offers Enhancements: e-Sign Forms for CC offers, More e-Sign Forms per offer

Proj#	Description
58298	New features to run membership or batch of accounts through CLR path program
59016	Update collections summary dashboard to match NCUA revised delinquency terms
59075	Modify all programs using vendor name to pull from ISOVEND and ISOCUVND fields
59088	Add NCUA edit message to 5300 call report tool
59110	Nostradamus enhancements to scoring and results viewer
59276	Add optional 2 Factor Authentication to P2P enrollment and transactions in online banking
59324	Xpress teller enhancement – option to hide drawer amount and add teller vault cash features
59705	Expand shared branching block for new members to Xtend shared branching
59831	New FUEL Decision Performance report
59918	Allow password reset feature to specify temporary password
60047	Create an SSO to CryptoFI from Its Me 247
60334	Internal tool to fix running balance issues
60417	Payrailz P2P realtime processing
60626	Native Receipts change to not overwrite custom workstations configuration
60795	Native Receipts support for CashTracker
60869	1 Click offers enhancement to support multiple documents
60955	Create configuration in CU*BASE for CryptoFI SSO integration

<b>Product:</b> <b>CU*BASE</b>		
<b>Release #:</b> <b>23.12</b>	Determine release content	Nov 7
	Beta-selection period	n/a
	<b>Technical Release Review</b>	<b>TBD</b>
	Beta training	n/a
	Beta start	n/a
	Tool database blackout	Nov 24-Dec 10
	Release summary to CUs	Dec 4
	Client training	n/a
	<b>Release to Online CUs</b>	<b>Dec 10</b>
	Release to Site-Four	Dec 10
Release to Self Processors	Dec 17	
<b>Release type:</b> Year-end/tax, GOLD update		
Beta clients:	N/A	

Proj#	Description

Targeted/planned for this release but not yet confirmed as feasible:

Proj#	Description
TBD	IRS file changes as needed

<b>Product:</b> <h1>Analytics Booth</h1>	Determine release content	
	Release Summary to CUs	
	Release Summary to CUs (Reminder)	
	Client Training (Pre-release)	
<b>Release #:</b> <h1>AB_23.12</h1>	Release to all AB Subscribers	
	Client Training (Post Release)	
Beta clients:		

Proj#	Description

## Other "Squeaky Wheel" Projects in the Pipeline to Track

These are projects not already slated for a release but where a project champion has asked that these get attention as soon as possible.

Proj#	Description
<b>55517</b>	Create control table in OPER for Xtend to manage file transfer locations for email marketing.
<b>55713</b>	Re-architect NT-Alerts to address IBM full-open recommendations; also includes new configuration to control when daily e-Alerts are sent (blackout period during the wee hours of the night, local CU time)
<b>56342</b>	Enhance TGENPST to process 360 mortgage payments
<b>57952</b>	Add option to loan category config to prevent loan payoff via online banking
<b>56539 &amp; 59117</b>	Add last 4 and MCC group to member statements
<b>58655</b>	FNMA file expansion (another project for deferrals related and will need screen changes)
<b>58544</b>	API for MessagePay to receive or send loan/share information
<b>58785</b>	Creation of ACH Direct SSO for MagicWrighter
<b>59205</b>	Change contract variable rate notices to disclose configured rate change frequency
<b>59310</b>	Correct int date advances on 360 mortgage pay ahead from online banking transfers
<b>59436</b>	Correct credit pull program from adding additional manual pulls on system
<b>59471</b>	Create new process to get OLB data daily and move through system with little or no intervention
<b>59522</b>	Correct AFT payments for 360 mortgages when set to pay regardless of other payment to pay principal only when current instead of calculating interest
<b>59533</b>	Mini contract variable rates are not changing correctly based on max increase/decrease

Proj#	Description
60092	Handling Principal Curtailments on Interest-Only Loans When Late Payments are Received
60115	Loan Queue enhancement to add print underwriter packet for locked applications
60515	Change the \$0 memo deposit transaction description on incoming A2A Transactions
60572	Enhance the Search Feature When Reviewing Account Transactions in Online Banking
60647	1Click Unfunded Offers