Release Information

Product	Release Date
CBX®	**November 17, 2026**
Released to the Following:	**Keys to the Symbols:**
• Online Credit Unions • Site-Four Credit Unions • Self-Processing Credit Unions	☑ You'll see it immediately. You'll need to activate it. You'll need to work with a CSR to set it up. There may be related fees; contact a CSR.

Notes for This Release

All projects will be available immediately, however, review the projects that will require activation or interaction with a CUSO representative.

Included in This Release

☑ "Clear" and Save Inventory" Buttons Added to Tool #33 "Teller Drawer Control/Inquiry"

Project Number: 68305

Buttons were added to the *Teller Drawer Control* screen to make features more visible to users.

☑ Adjustment to Associated Application Co-Applicant Screen

Project Number: 68305

Client reported that selections on this screen were not functioning as expected. This is corrected with this release.

☑ Display of Last Introduction Box on Tool #258 "Configuring Laser Notices"

Project Number: 68305

Client reported that the last introduction box was not displayed correctly in CBX. This is corrected in this release.

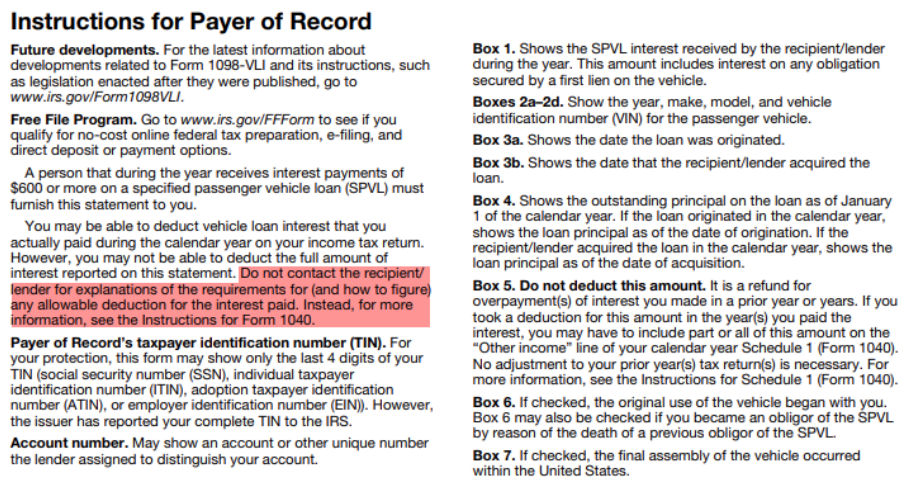
☑ Flood Options Available for 1098-VLI Eligibility Flags

Project Number: 68590

See below for the table of updated information regarding the 1098-VLI tax forms. Note that the flood options will be in the Tuesday release;

Tue, Nov 17	The 26.10 CBX release activated the *Eligible for 1098-VLI* checkbox on the collateral maintenance screen to mark open accounts that are eligible for a 1098-VLI form.

	Following the 11.17 minor release on Tuesday, two flood options will be available in CBX via **Tool #1210 *Self-Directed Data Floods***. The flood options available on November 17th will allow credit unions to flood collateral records for open or closed accounts based on a list of accounts (provided by the credit union). This must be a table in your QUERYxx library containing both account base and loan account type (suffix). A 1098-VLI tax record will be created at year-end for all marked accounts. **Note for closed accounts**: The option to flood closed accounts is the only mechanism to flag 1098-VLI eligibility on collateral records for closed accounts (you cannot flag them manually through the account update process). If you do not choose to flood them, you must manually create a 1098-VLI record for them – including the interest amount – via **Tool #899 *Update IRS Tax Information***. **Note that this manual update cannot be done until after the December 6 release.** As with any self-directed flood requiring an external account list, upload authority is required.
Sun, Dec 6	The 26.12 CBX release, implemented on Sunday, December 6, will contain changes to add the 1098-VLI tax reporting information to **Tool #899 *Update IRS Tax Information*.** If a loan is selected as eligible for 1098-VLI, fields will be available in the member tax file for *Vehicle Loan Interest* and *Reimbursement of overpaid loan interest*. You will be able to maintain those fields, however, **USE CAUTION**, as when tax records are created on January 1st, any amount in this field will be **added** to the amounts generated in tax processing. Note that you cannot enter a negative amount.
Fri, Jan 1	EOY/BOY processing is run, and tax records are created for members. Remember that any existing amount in the interest field will be added to the 1098-VLI amount generated by the system.
Wed, Jan 6	Deadline to complete adjustments to the tax file. Note that the tax process that adds the interest amount to the file will add only the interest listed on the member record. Any calculations or adjustments to the interest amounts must be made manually. Note the instructions on the 1098-VLI form point the form recipient to the IRS form, **Instructions for Form 1040.**

	
Sun, Jan 31	*(Mon, Feb 1 as the deadline is Sunday)* 1099 and 1098 forms are due to members.
Fri, Mar 5	Final deadline for adjustments to the tax file before 1099/1098 IRS reporting.

New Fannie Mae File Option for Custom Enrolled Credit Unions

Project Number: 68117

There is a new file option for Fannie Mae that is a custom option for enrolled credit unions.

Database Changes

Attention Database Administrators: With each new release, new database tables/fields, or changes to existing tables/fields may be implemented. **There are no database updates in this release.**

Database Changes

Running Your Custom Queries

If a file listed below is included in any of your custom reports or inquiries, you must refresh the Query definition, **or your Query MAY NO LONGER RUN:**

1. In **Tool #100** ***CU*BASE Report Builder (Query),*** choose **2=Change** and enter your Query name, then use Enter to proceed
2. Select **Choose Files**

Updating Your Automated Queries

If you ever remove or add a file to a Query definition of a Query that you have automated, your Query **MAY NO LONGER RUN** unless you also **update the Query automation configuration** as follows:

1. Access **Tool #758** ***Report Automation – Custom Rpts/Files***
2. Select the Query and use **Edit**
3. Make the necessary changes and use **Add/Update** to save

3. Use Enter ➡️ to move through these screens until you're back to the **Report Builder - Main Menu**
4. Use **Exit** ⬆️
5. Select ☑️ **Save query definition** and Run **Interactively** then use Enter ➡️

NOTE: If the field changes from a numeric to an alpha-numeric field, you will need to add 'single quotes' around the Selection Criteria.

NOTE: You do not need to do this if all you do is tweak a selection parameter such as modifying a date.

New Database Tables

*For details on the formats and available values for specific table columns, refer to **Tool #332 Database Search Assistant.***

Table	Description	Purpose	PS #
FNMAESCSND	Fannie Mae File option	Custom flood option for enrolled credit unions.	68117

Tool Changes

Attention Security Administrators: With each new release, new tools or changes to existing tools may be implemented. **There are no tool updates in this release.**

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