

26.10

RELEASE SUMMARY

Imaging Solutions Software

BETA
08/01/2026

ENHANCED ONLINE
10/25/2026

IN-HOUSE
10/25/2026

What is this release?

The Imaging Solutions release is for Enhanced Online and In-House Release Managed clients. Not every feature applies to both types of clients, so look for the symbols next to each feature to see which ones apply to you.

How do I get this release?

In-House Managed Clients: Imaging Solutions will contact you to schedule the update for your system after the release.

Enhanced Online Clients: Imaging Solutions will deploy your release on the data provided above. Any added features can be purchased at store.cuanswers.com.

Have an in-house imaging server but aren't Release Managed yet? Sign up today and we'll waive the fee for the first year. Contact imaging@cuanswers.com.

Symbols

🏠 In-House 🌐 Enhanced Online

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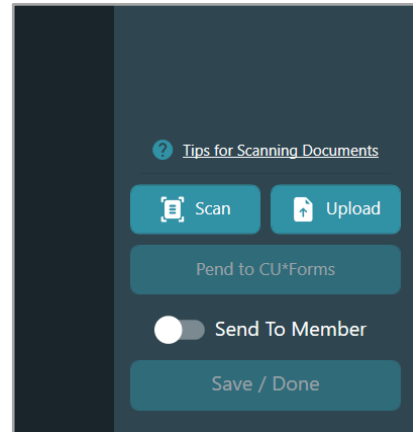
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Native Receipts

Send Scanned Documents to Members and Pend to CU*Forms

You already use **Send to Member** to share receipts, and now it works for scanned documents too. After you scan a document in Native Receipts, turn on Send to Member and a copy goes straight to your member. Same easy steps, now for more of the documents you handle every day.

After scanning or uploading a document into Native Receipts, you can click **Pend to CU*Forms** to transfer that document to a Pending Area of your choice in CU*Forms. You or another team member can then process the document, draw signatures, or send it out for eSign.



Tablet Signing

Native Receipts now shows receipts and forms right on the signature tablet. Members can read the full document on a full-color display before they sign, so they always know exactly what they're agreeing to.

Supported hardware: Topaz GemView 10 Tablet Display [View in store →](#)



Multi-Document Upload

When uploading documents, you can now select multiple files at once instead of adding each one individually. Pick them all, upload in one step, and get back to your member faster.

More Account Types

Not every document belongs to a single open account. You can now scan for:

- Closed accounts
- Duplicate member accounts
- Non-member accounts

CU*Forms

Denial FormFLOW Configuration

You can now configure a Denial FormFLOW that is selected automatically when you complete the denial process in CBX. When a loan is denied in CBX, the form is created automatically and the Denial FormFLOW is selected, if one is configured. You can set this up in the Lending FormFLOW Configuration (Admin\FormFLOW\Lending). Once it is set up, it will look like the example below.



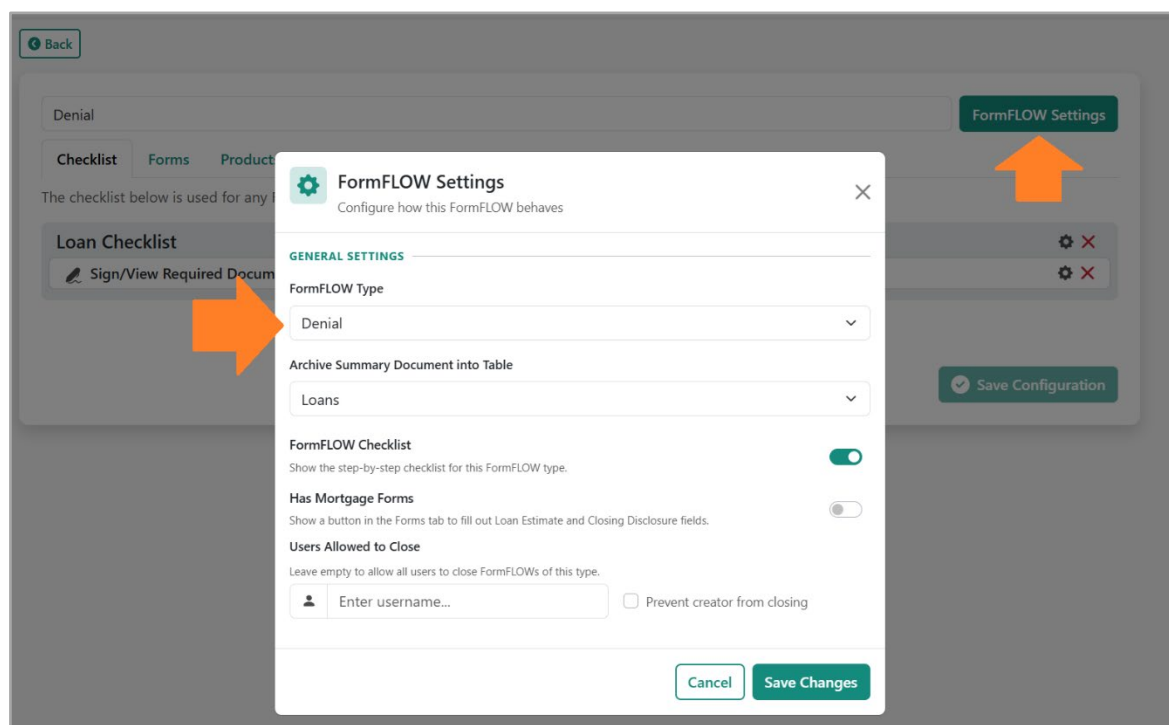
Loan FormFLOW Configurations Create New Configuration

Search using keyword
Enter Keyword

☆ Auto Loan	  
✶ Denial Denial	  
☆ Secured Loan	  
☆ Some Cool FormFLOW	  
☆ Unsecured Loan	  
★ Vehicle Loan	  

DEFAULT   

To create a new Denial FormFLOW or make an existing FormFLOW your Denial FormFLOW, open the FormFLOW settings (within a FormFLOW) and select Denial from the FormFLOW Type dropdown. Only one Denial FormFLOW is allowed.



Back

Denial

Checklist Forms Product

The checklist below is used for any

Loan Checklist

Sign/View Required Document

FormFLOW Settings
Configure how this FormFLOW behaves

GENERAL SETTINGS

FormFLOW Type
Denial

Archive Summary Document into Table
Loans

FormFLOW Checklist
Show the step-by-step checklist for this FormFLOW type. ☒

Has Mortgage Forms
Show a button in the Forms tab to fill out Loan Estimate and Closing Disclosure fields. ☐

Users Allowed to Close
Leave empty to allow all users to close FormFLOWS of this type.
Enter username... ☐ Prevent creator from closing

Cancel Save Changes

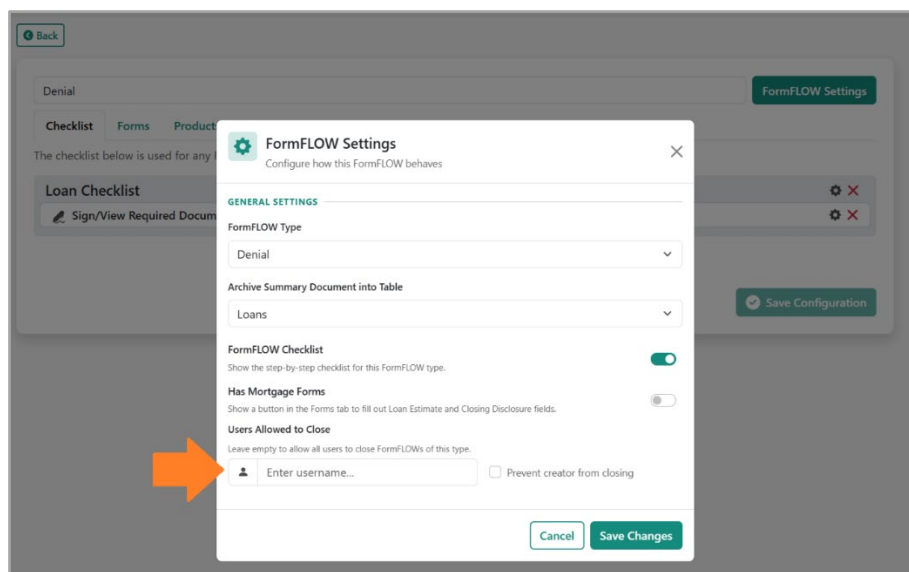
FormFLOW Settings

Save Configuration

Control Who Can Close FormFLOWS

You can now choose exactly who has permission to close a FormFLOW. Give the right people the final say, keep work in progress safe from accidental closing, and know that every FormFLOW is wrapped up by someone who should be wrapping it up.

To set this up, open the FormFLOW settings (within a FormFLOW) and enter the user(s) who should be able to close FormFLOWS. You can also prevent the creator of a FormFLOW from closing it. Leave this field blank if you don't want to restrict who can close FormFLOWS.

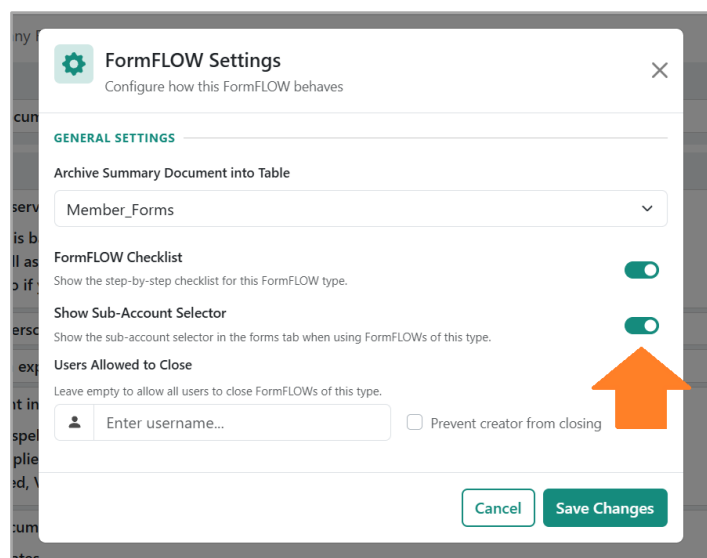


The image shows a 'FormFLOW Settings' dialog box with a gear icon and a close button. The title is 'FormFLOW Settings' with the subtitle 'Configure how this FormFLOW behaves'. Under 'GENERAL SETTINGS', there are three sections: 'FormFLOW Type' with a dropdown menu set to 'Denial'; 'Archive Summary Document into Table' with a dropdown menu set to 'Loans'; and 'FormFLOW Checklist' with a toggle switch turned on. Below these is a section titled 'Users Allowed to Close' with the instruction 'Leave empty to allow all users to close FormFLOWS of this type.' It contains a text input field with a person icon and the placeholder 'Enter username...', and a checkbox labeled 'Prevent creator from closing' which is currently unchecked. At the bottom are 'Cancel' and 'Save Changes' buttons. An orange arrow points to the 'Enter username...' input field.

Hide Sub-Account Selection for Membership FormFLOWS

Not every membership checklist is organized by suffix. You can now hide the Sub-Account selection on membership FormFLOWS, so you can use account search to build a membership account checklist that fits the way your credit union actually works.

This setting is in the Membership FormFLOW settings area.



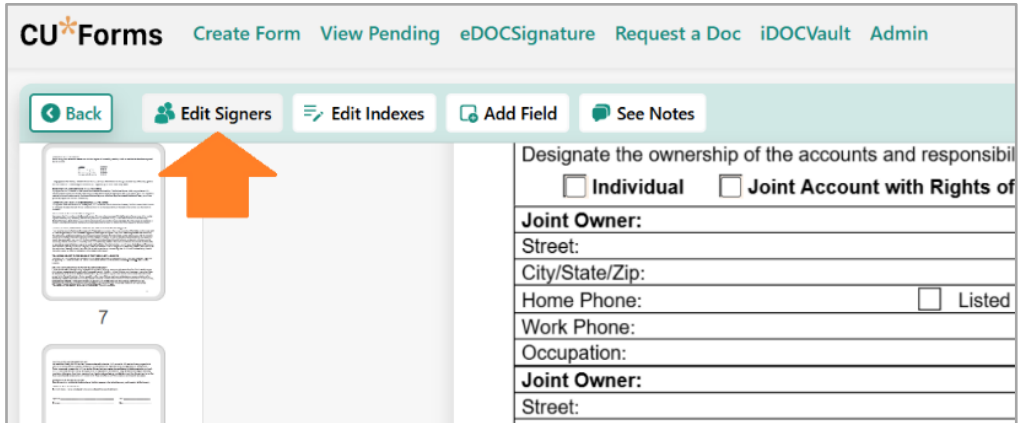
The image shows a 'FormFLOW Settings' dialog box with a gear icon and a close button. The title is 'FormFLOW Settings' with the subtitle 'Configure how this FormFLOW behaves'. Under 'GENERAL SETTINGS', there are three sections: 'Archive Summary Document into Table' with a dropdown menu set to 'Member_Forms'; 'FormFLOW Checklist' with a toggle switch turned on; and 'Show Sub-Account Selector' with a toggle switch turned on. Below these is a section titled 'Users Allowed to Close' with the instruction 'Leave empty to allow all users to close FormFLOWS of this type.' It contains a text input field with a person icon and the placeholder 'Enter username...', and a checkbox labeled 'Prevent creator from closing' which is currently unchecked. At the bottom are 'Cancel' and 'Save Changes' buttons. An orange arrow points to the 'Show Sub-Account Selector' toggle switch.

Edit Roles and Templates on the Populated Form Screen

Plans change mid-form, and now your form can change with them. Right from the Form Completion screen, you can edit roles and add or remove templates, giving your credit union more control while working through a form, with no need to start over.

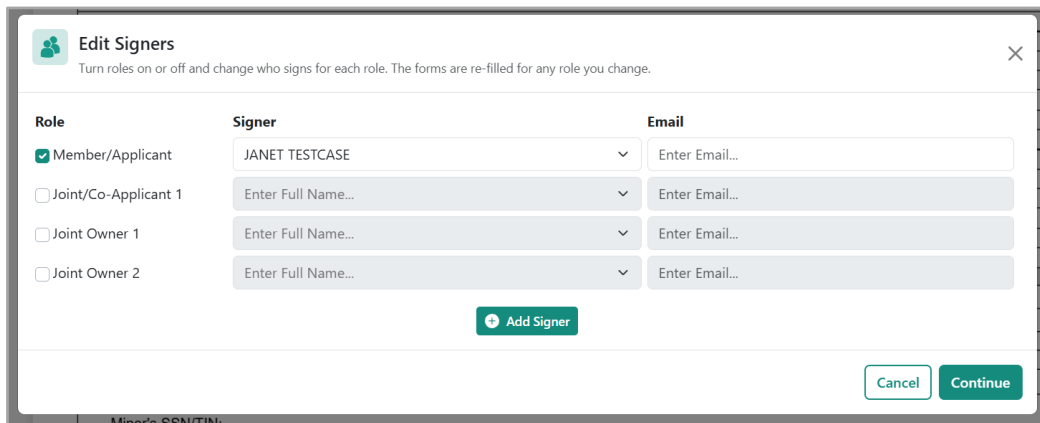
Editing Roles

1. To edit your signers, click "Edit Signers."



The screenshot shows the CU Forms interface. At the top, there's a navigation bar with links: Create Form, View Pending, eDOCSignature, Request a Doc, iDOCVault, and Admin. Below this is a toolbar with buttons: Back, Edit Signers (highlighted with an orange arrow), Edit Indexes, Add Field, and See Notes. The main area is divided into two sections. The left section shows a preview of a form with a page number '7'. The right section is a form titled 'Designate the ownership of the accounts and responsibility' with checkboxes for 'Individual' and 'Joint Account with Rights of'. Below this are fields for 'Joint Owner:', 'Street:', 'City/State/Zip:', 'Home Phone:', 'Work Phone:', and 'Occupation:'. There are also checkboxes for 'Listed' and 'Joint Owner:'.

2. Rearrange or add signers as needed, then click Continue to save your changes. Any signer you don't change keeps their current values, so there's no need to retype anything.

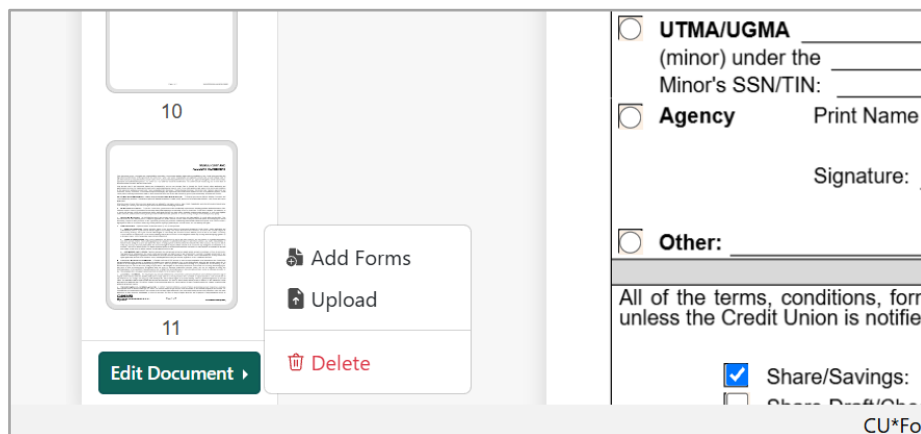


The screenshot shows the 'Edit Signers' modal window. It has a title bar with a close button. Below the title bar is a subtitle: 'Turn roles on or off and change who signs for each role. The forms are re-filled for any role you change.' The main area contains a table with three columns: Role, Signer, and Email. The roles listed are: Member/Applicant (checked), Joint/Co-Applicant 1, Joint Owner 1, and Joint Owner 2. The Signer column has dropdown menus for each role, with the first one showing 'JANET TESTCASE'. The Email column has input fields for each role, with the first one showing 'Enter Email...'. At the bottom of the table is an 'Add Signer' button. At the bottom right of the modal are 'Cancel' and 'Continue' buttons.

Role	Signer	Email
☒ Member/Applicant	JANET TESTCASE	Enter Email...
☐ Joint/Co-Applicant 1	Enter Full Name...	Enter Email...
☐ Joint Owner 1	Enter Full Name...	Enter Email...
☐ Joint Owner 2	Enter Full Name...	Enter Email...

Adding or Removing Forms

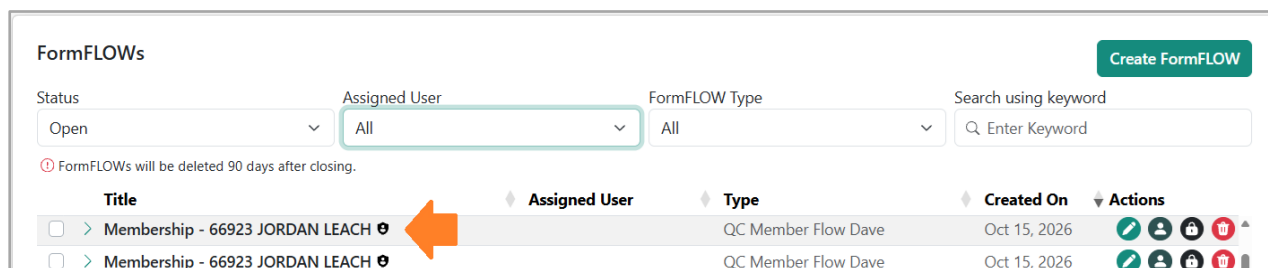
1. To add or remove forms, click Edit Document and select Add Forms, Upload, or Delete.
 - a. **Add Forms** walks you through adding one or more new templates.
 - b. **Upload** lets you upload a document.
 - c. **Delete** removes any form(s) from the list.



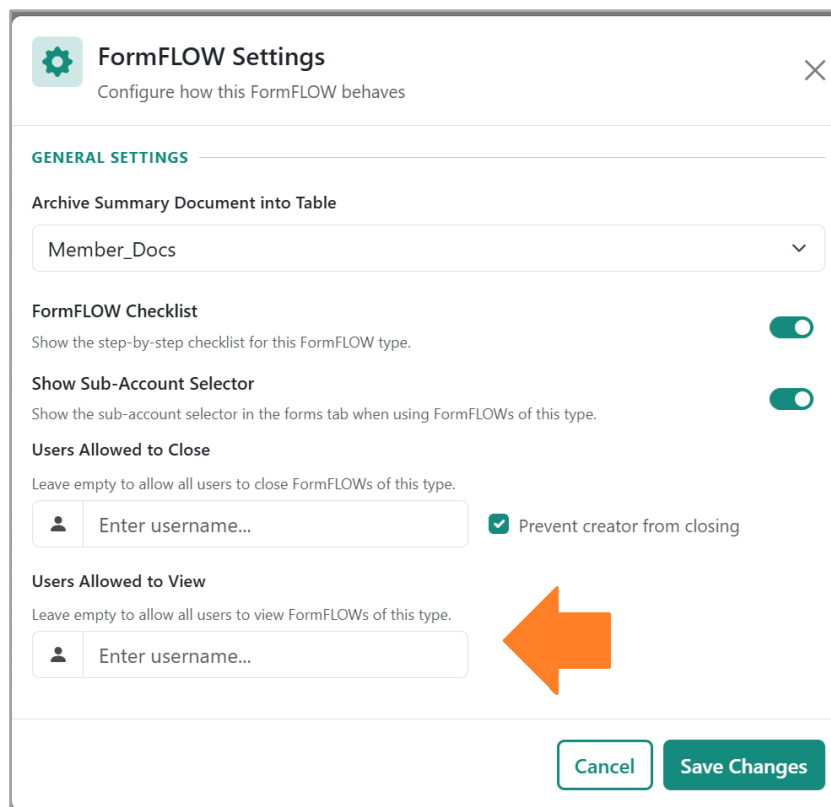
Lock Down FormFLOWS and their Documents to Specific Users

You can now lock down FormFLOWS, and the pending documents within them, to specific users. This lets you hide any FormFLOW that you don't want everyone to see.

You'll know a FormFLOW is restricted when you see the  icon next to the FormFLOW or its pending documents. These items appear only to the users listed in the setting. Hover over the icon to see who can view them.



To set this up, open the FormFLOW settings (within a FormFLOW) and enter the user(s) who should be able to see the FormFLOW. Leave this field blank if you want everyone to be able to see the FormFLOW and its pending documents.



FormFLOW Settings
Configure how this FormFLOW behaves

GENERAL SETTINGS

Archive Summary Document into Table
Member_Docs

FormFLOW Checklist
Show the step-by-step checklist for this FormFLOW type. ☒

Show Sub-Account Selector
Show the sub-account selector in the forms tab when using FormFLOWs of this type. ☒

Users Allowed to Close
Leave empty to allow all users to close FormFLOWs of this type.
 ☒ Prevent creator from closing

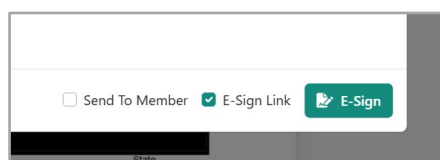
Users Allowed to View
Leave empty to allow all users to view FormFLOWs of this type.

Cancel Save Changes

Get the eSign Link for All Signers

We've expanded the eSign link feature so you can now get the link for every signer on a form, not just one. When sending a document for eSign, check **E-Sign Link** and click **E-Sign**. A new window pops up with a link for each signer, ready to copy into any external application you're using to help the member sign.

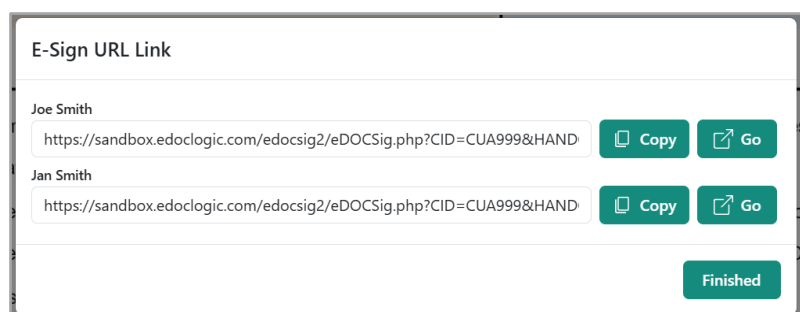
1. Check E-Sign Link.



☐ Send To Member ☒ E-Sign Link 

State

2. Copy or open each signer's link.



E-Sign URL Link

Joe Smith
<https://sandbox.edoclogic.com/edocsig2/eDOCSig.php?CID=CUA999&HAND>  

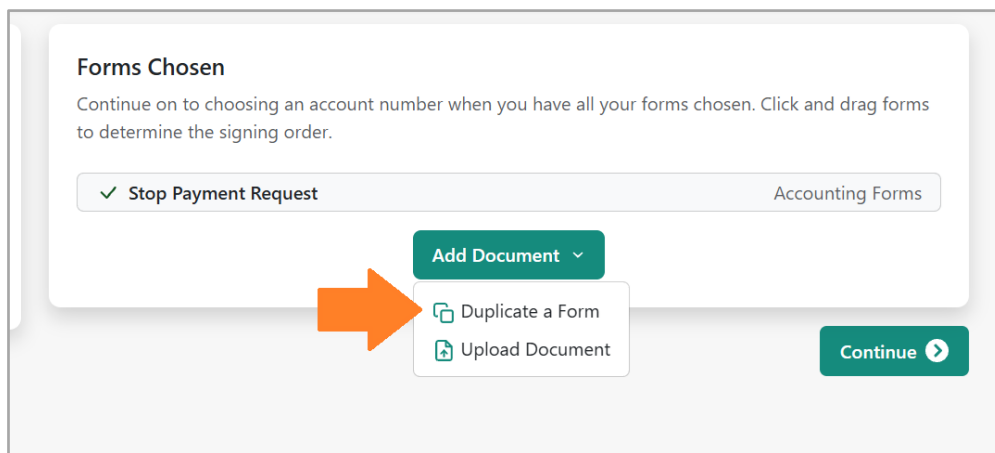
Jan Smith
<https://sandbox.edoclogic.com/edocsig2/eDOCSig.php?CID=CUA999&HAND>  

Finished

Duplicate a Form

Need five stop payments or debit dispute forms for one member? Staff can now duplicate a form instead of building each one from scratch. Here's how:

1. Select a form, click **Add Documents**, and choose **Duplicate a Form**.
2. Enter how many times you'd like to duplicate it.
3. Click **Continue** and select the account number.
4. CU*Forms recognizes the duplicates and asks if you'd like to adjust the suffix for each one.



New Fields

The following fields are now available as form values for programming. To have fields created, please contact imaging@cuanswers.com.

- IRA Beneficiary - Is Spouse
- IRA Beneficiary - Type
- IRA Beneficiary - Distribution Percentage
- Full Name (First, Last, Middle Initial)
- Sub-Account - Overdraft Protection - Account Base
- Sub-Account - Overdraft Protection - Account Suffix
- Sub-Account - Overdraft Protection - Account Base & Suffix (Combiner)
- Sponsor Number
- Loan - Is One of Categories (allowing the user to input a list of categories to check against)
- Loan Process Type
- Loan - Has Debt Protection
- Credit Insurance - Has Life

Write Out Amounts and Rates in Words

Currency and percentage data points have two new formats, so your forms can spell out numbers exactly the way they should read.

Amount as Words

Spells out an amount the way it's written on a check.

Example: **12,345.67** → "Twelve Thousand Three Hundred Forty-Five and 67/100"

Percentage as Words

Spells out a rate, reading the digits after the decimal point one at a time and leaving off trailing zeroes.

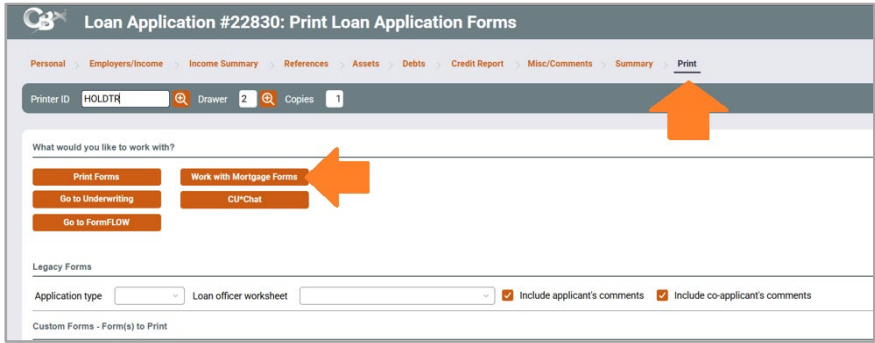
Example: **12.345** → "Twelve Point Three Four Five"

Example: **5.000** → "Five"

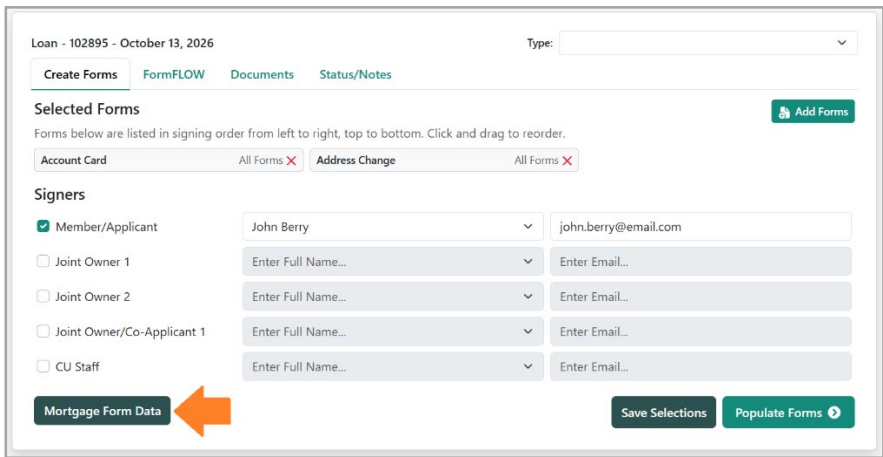
Active Beta – Loan Estimate and Closing Disclosure

The Loan Estimate and Closing Disclosure forms are ready for Active Beta! Because these two forms are calculation-heavy by nature, we built a new way to support them.

1. To start working on these documents, launch the new forms screen by:
 - a. Clicking “Work with Mortgage Forms” under Print in the CBX loan application process.



- b. Opening the FormFLOW and clicking “Mortgage Form Data.”



2. After clicking either button, you will see the government-issued Loan Estimate and Closing Disclosure forms. Enter the required information, and the form will do all of the calculations for you. Complete the form as fully as possible. Keep in mind that the form is

not signed here; you will still launch it for signing through the standard CU*Forms process.

- a. While CU*Answers provides default Loan Estimate and Closing Disclosure forms for everyone, we do not certify these forms, and they are subject to change at any time.
- b. If you would like to program your own form, use ours as an example. Contact imaging@cuanswers.com to have us copy the form into your library so you can see the programming variables.

3. Programming your own form:

- a. A new option in Form Template programming lets you turn the programming fields for these two forms on and off. In the template settings, check "Show Loan Estimate Fields" or "Show Closing Disclosure Fields" as needed.

The screenshot shows a 'Settings' dialog box with the title 'Settings' and subtitle 'Configure form behavior and document indexes'. It is divided into three main sections: FORM SETTINGS, FIELD SETTINGS, and DOCUMENT INDEXES.

FORM SETTINGS

- ☒ Active for Use
- ☐ Exclude from Archiving
- ☐ Restrict Reference Document Recipients

FIELD SETTINGS

- ☒ Populate from CU*BASE
- ☐ Show Denial Notice Fields
- ☒ Show Loan Estimate Fields (highlighted with an orange arrow)
- ☐ Show Closing Disclosure Fields

DOCUMENT INDEXES

Storage Table

Index Name	CU*BASE Field	Required
Account	Account Base	☒
Suffix	Account Suffix	☐
SSN	SSN / TIN / EIN	☒
First_Name	First Name	☒
Last_Name	Last Name	☒
Closed_Date		☐
Open_Date	Sub-Account Open Date	☐

Buttons: + Add Index, Cancel, Save

Active Beta – AI Lending and Membership Review

CU*Forms has a new option that sends all the documents in a FormFLOW to AI to verify the information on them. The AI review can help you:

- Confirm that every signer signed some of the documents
- Confirm that the member's photo ID is not expired
- Catch data from CBX that doesn't match what's on the form

This feature is designed to make the review process easier by helping your reviewer spot inconsistencies. While it isn't a substitute for a person reviewing the loan, it gives your reviewer a helpful second set of eyes.

Keep in mind that this feature uses AI and is in Active Beta. We want to work together with your credit union to fine-tune the AI checklist based on which items it flags correctly and which it doesn't. To join the beta, contact imaging@cuanswers.com.

Software Versions

Product	Version
CBX Install Suite	26.10.0
CBX Station Control	1.5.3
CentralizedSettings	1.9.0
CU*Forms	1.26.0
iDocVault 2.0	8.26.0.27
Imaging Migration Tools	1.4.0
Imaging Task Executor	1.5.0
IS Adapter Service	1.10.0
IS-API	1.17.9
IS-Reports-API	1.2.4
Native Receipts	1.9.1
Vault Manager	1.4.2