

21.10 CU*BASE Release

BETA POOL APPLICATION

Revised: July 2021

Thank you for your interest in joining the 21.10 CU*BASE release beta pool! To be considered, please complete all sections of the application:

- Release Teams/Task Assignments
- Agreements
- Credit Union Information
- Shared Arrangements and Services

Release Teams/Task Assignments

To ensure that the beta period is as successful as possible, we would like to know if your teams are able to test and report on specific functions of the 21.10 release, as well as other enhancements discussed during beta training. Think carefully about each item, and who on your staff will be able to work with and provide feedback for it. Indicate your ability to test each item, even if you are unsure or unable to test a specific feature. **Please note that the inability to test an item does not automatically disqualify you from consideration.**

Release Team	Project Highlights	Testing Ability
Front Line Staff (Member Service and Teller)	This release contains updates to Xpress Teller screens, including a new method to edit member IDs (Xpress Teller only), search capabilities in Tracker Review inquiry, and more.	
Data Analysts	We are always interested in data analyst teams that want to test new dashboards, feature enhancements, and VAT upgrades with each release. This release contains updates to the Online Banking Activity Analysis and Indirect Loan Dashboards.	
EFT	This release contains projects to begin building Merchant Category Code group configurations (for future enhancements), as well as card randomization.	
Lending	This release contains updates to allow for storing loan disbursement instructions, as well as member-elected skip pay for credit cards, and a new HMDA database.	
Back Office	We are interested in teams that would like to test non-return fees by origin code, adjusted ANR scoring, and enhancements to Employee Audit reports (Audit). Also included in this release is the ACH on-demand option to differentiate fees between online banking and those done via phone.	

Agreements

Each release has its own unique requirements and eligibility criteria, and its own beta selection period, so a new application must be submitted to be considered for the release specific to this form. Please select that you agree to the following:

- My credit union would love to join the beta pool for the upcoming release. Based on the rules published for this release I have confirmed that we are eligible, and I am authorized to commit the credit union to participate.
- My team agrees to attend any scheduled beta training sessions, and to complete the beta-test logs and provide feedback during the beta period as instructed.

Credit Union Information

Credit Union	<input type="text"/>		
Contact Name	<input type="text"/>		
Email	<input type="text"/>	Phone	<input type="text"/>

Shared Arrangements/Services

As noted above, each release has unique eligibility requirements, some that hinge on credit unions with relationships with certain services. Please select if your CU participates in the following shared arrangements:

- Xtend Shared Branching
- Another CU*BASE Shared Branching arrangement (CU-to-CU)
- National Shared Branching (CUSC/FSCC/Co-Op)
- Xtend SRS Bookkeeping
- Neighborhood Mortgage Solutions (NMS)
- Shared employee arrangement with another CU (*i.e., someone at another CU signs on to your files to do work for you, or your employees sign on to another CU to do work for them, such as loan processing or management services*)

Once you have completed all sections of this application, please submit it to BetaPool@cuanswers.com for consideration. We will contact all applicants at the end of the beta selection period.

Questions? Contact a Client Service and Education Representative at 800-327-3478
See more about the beta pool here: <https://www.cuanswers.com/resources/beta/>