

25.05 CU*BASE Release

BETA POOL APPLICATION

Revised: February 2025

Thank you for your interest in joining the 25.05 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 25.05 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
Back Office	➤ Added block list to prevent members from using ITMs	<input type="checkbox"/> We use ITMS
	➤ Enhanced support for loan payments on ITMs	
	➤ Added audit inquiry for Sage Direct mortgage statements	<input type="checkbox"/> We have mortgage statements through Sage
	➤ Added new EOD ACH On-Demand Posting report	<input type="checkbox"/> We offer on-demand ACH
	➤ Enhanced workflow for safe deposit box maintenance	<input type="checkbox"/> We have safe deposit boxes
	➤ Enhanced Max Earnings Sweep transfers	<input type="checkbox"/> We offer Max Earnings Sweeps
	➤ Enhanced GL history search	<input type="checkbox"/> We will test this search
Lending	➤ Added option to prevent loan payoff in OLB for closed-end loans	<input type="checkbox"/> We have closed-end loans
	➤ Enhanced mini-contract variable rate loans	<input type="checkbox"/> We have mini-contract variable rate loans
	➤ Enhanced interest-only loan configurations	<input type="checkbox"/> We have int-only loans
	➤ Enhanced HMDA Account Information screen to auto-populate loan data	<input type="checkbox"/> We do HMDA reporting
EFT	➤ Added support for retailer groups for credit card cash back and card activity rebate programs	<input type="checkbox"/> We offer credit card cash back/card activity rebates
	➤ Added support for dual emboss on ATM/debit cards for individual memberships	<input type="checkbox"/> We'll offer dual emboss on ATM/debit cards

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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 (COOP)
- ☐ 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/>