

24.05 CU*BASE Release

BETA POOL APPLICATION

Revised: February 2024

Thank you for your interest in joining the 24.05 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 24.05 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
Member Service/Teller	This release contains enhancements for handling new members/accounts, including incorporating CU*Forms in the account opening process, and customizable new member comments. We've added the ability to lock ACH maintenance in Online Banking, the ability to post on-demand ACH fees regardless if the base deposit account's balance has enough to cover fees, further refinements to the member search engine, a new member IP address lookup dashboard, and new view-only options for Online Banking configurations and member HSA balance information.	
Lending	We've made enhancements to package loans to be sold, the Concentration Risk Analysis dashboard, dealer information configuration, and participation loan reports. We've also added a new 1Click unfunded loan offer, an overpay limit field for credit card loans, the ability to show red flag alerts when working/creating loan applications, and new loan category configuration options.	
Accounting/Back Office	Additionally, a new corporate check/money order reconciliation tool is being rolled out with this release to improve your workflow.	

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/>