

Jump into the beta pool!

SIGNUP FORM

Revised: August 2020



Does your credit union like to be in on the ground floor of new tools and ideas?

Have you got the kind of team that dives into new software with enthusiasm?

Are you an early adopter just chomping at the bit to get at that next new software feature?

If you're willing to help us test other new tools at the same time, you just might get your wish.

Each release has its own unique requirements and eligibility criteria, but even if you aren't eligible for a specific release, we still would like to include you in the pool of CUs to consider.

Yes! My credit union would love to jump into the beta-test 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

Contact Name

Email Phone

Release #

My CU participates in these shared arrangements

- Xtend Shared Branching
- Another CU*BASE Shared Branching arrangement (CU-to-CU)
- National Shared Branching (CO-OP)
- Xtend SRS Bookkeeping
- 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*)

Comments or questions

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TASKS FORM

Revised: .

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 these specific functions of the . release. Other enhancements to test will be 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 below your ability to test each item. Please note that the inability to test an item does not automatically disqualify you from beta pool consideration.**

Release Team or Task Assignments

Data Analysts/CEO

This release includes many VAT enhancements, including additional XL and L presentation-size screens on the LOS and home screen. This release also includes new dashboards and improvements to existing ones.

Are you able to test these features?

Member Service/All Staff

A credit union with a team who is enthusiastic about tailoring their preferences and favorites is encouraged to apply to test the updates to the CU*BASE home page favorites and preferences in the continued Nav 2.0 initiatives.

Are you able to test these features?

EFT

We are seeking a credit union with a strong EFT team to test the enhancements to card expiration processing, and enhancements to the card ordering screens.

Are you able to test these features?

Accounting/Back Office

This release features substantial enhancements to subsidiary processing with the new subsidiary dashboard. There are also enhancements to reporting including updated reports, a new report, and obsoleted reports.

Are you able to test these features?

Lending

The CU*BASE LOS has several updates within the loan processing screens, including new presentation-size loan queue screens, as well as new fields in the loan summary screens. We are looking specifically for credit unions to test the CD-secured loans online offers feature, complete with automated e-signature forms.

Are you able to test these features?

Send the completed form to BetaPool@cuanswers.com

Refer questions to any Client Service Representative at 800-327-3478