This list shows major projects in the pipeline for upcoming releases for CU*Answers software products, including CU*BASE®; **It's Me 247** online, mobile, and text banking; CU*Talk; UCI middleware solutions; Imaging Solutions products; Analytics Booth; and other CU*Answers software products. Releases may also contain a number of minor modifications not outlined here.

All release dates and projects listed are **tentative and subject to change**, and we reserve the right to delay slated projects based on QC test results.

KEY TO RELEASE NUMBERS

Sample: **XXX.24.05.01**

XXX represents the team/product*
24 represents the year (2024)
05 represents the month (May)
01 represents a sequence number
*Not used for CU*BASE releases*

2024 Releases

Product:		
CU*BASE	Determine release content	**February 6**
	Tool request deadline	March 15
	Beta selection period	February 13 – 27
	Technical Release Review	March 12
	Internal notification	March 18
Release #:	Beta training	**March 21 2:30 PM ET**
24.05	Beta start	**March 24**
	Release summary to CUs	April 16
	Client training	
Release type:	**Release date for:** • **Online** • **Site-Four** • **Self-Processing**	**May 5**
Beta clients:	Partnership Financial, Shoreline, Thornapple CU, TBA	

Proj#	Description
56725	New tool to force post Credit Card Debit exceptions
57851	New structure for future enhancement to reward members for using plastic at local retailer/companies
58064	Search Engine 3.0
58075	Add separate card order address captured and stored with card order
58827	New Email notification process for incoming online banking requests
58984	Allow FIDM process to be run for all group providers or a single group provider
59139	Create structure for Payrailz A2A solution
59912	Add Export feature to various reports/dashboards in CU*BASE
60055	Create credit limit field to define the max amount a member can overpay credit card loans in online banking/ARU
60086	Create separate OPER config for ARU settings
60108	Add ability to have on-demand ACH fee be covered by incoming deposit
60413	Fields added to the Dealer configuration
60502	Enhancement to A2A Exception report
60595	Update to ACH distribution to add OLB maintenance lock flag and account lookups
60647	1 Click Unfunded Loans
60716	Expand new member comment to allow CU to customize

Proj#	Description
60741	Added CU Name used for Credit Bureau Reporting ID
60807	Adjustment to HMDA screen
61117	Create a view only tool for HSA balance information
61133	Standardize the GL Account Control Configuration
61134	Update the Account suffix configuration tool
61370	Change to tax reporting for foreign citizens
61483 and 61136	Enhancements to the Concentration Risk Analysis Dashboard
61234	Revise tips on e-mail maintenance screen
61524	Participation Loan Reports Export
61537	Phase 2 Enhancements to Package Loans to be sold
61584	Create a "Look up an IP address" dashboard
61641	New Preferred Terms in Master Parameters
61644	New Corporate Check Reconciliation Tool
61647	New view only option for online banking configurations
61772	Add Red Flag Alert when working with a Loan application
61817	Add export option from processor database tool 1033 and toolbox
61943	Adjustment to Text Banking workflow warning messages
61980	Add PSCU device types to BIN configuration
62032	Increase library size for AI*Engaged library statistics
62102	Add CU*Forms to account opening process
62204	Change to request credit report screen to allow entries for only 2 individuals
62252	New canned query to access NSF transaction table
62305	New maintenance program for PSCU Rewards ID
62422	Internal change to add type option to restore of encrypted type
62644	New toolbox option to set phone numbers to invalid when restoring libraries
62804	New maintenance program for AmpliFi Rewards
63180	Remove CU 'from' e-mail address maintenance from AP Workflow controls

Targeted/planned for this release but not yet confirmed as feasible:

Proj#	Description
60092	Handling Principal Curtailments on Interest-Only Loans When Late Payments are Received
60615	Integration with AFG lease/balloon calculator product
60664	Native Receipts for ALL channels
61275	Add loan category setting to prevent selected Credit Card accounts to be used as overdraft protection

Product: **Analytics Booth**		
	Determine release content	Feb 21
	Release Summary to CUs	May 27
Release #: **AB 24.06**	Release Summary Reminder to CUs	June 3
	Pre-Release Training (3PM EST)	June 12
	Post-Release Training (3 PM EST)	June 20

Release type:	Release date:	
Analytics Booth		**June 16**

Proj#	Description

Proj#	Description
62532	Add Ability to configure GL balance groups and ratios
62534	Start collecting and sending daily core data to Trending and Alert reporting in AB
62535	Import new group of data points from CU*BASE to support Branch Performance Reporting, Tending and Alerts
63181	Add the ability to test values to see if they 'Rise Above" or "Drop Below" user defined values for daily Alerts processing
63448	Add the capability to configure alerts on Loan Portfolio loan categories, security codes, and purpose codes

Product:		
CU*BASE	Determine release content	**July 2**
	Tool request deadline	August 16
	Beta selection period	July 16 – 30
	Technical Release Review	August 27
	Internal notification	August 19
Release #:	Beta training	
24.10	Beta start	**August 25**
	Release summary to CUs	September 16
	Client training	
Release type:	**Release date for:** • **Online** • **Site-Four** • **Self-Processing**	**October 6**
Beta clients:		

Proj#	Description

Proj#	Description
58071	Batch account adjustment posting
58074	New Option to pay escrow analysis surplus funds by check
59075	Modify all programs using vendor name to pull from ISOVEND and ISOCUVND fields
59261	Create a new daily teller activity report for non-member transactions
60152	Add ability to schedule future loan rate changes
60153	Create flat file for escrow analysis
60719	Update 1Click to include fee for modified APR
61004	Add Two-Factor Authentication to online banking member login
61147	Add transfer parameter to max earnings sweep configuration
61252	Create a process to import Mortgage statement mailing audit from SAGE

Proj#	Description
61428	Enhancements to Dollar amount search on GL history search screen
61645	Enhancements to Transaction Patterns for Abnormal Activity Monitoring
61695	Native Receipts for Co-op shared branching
61790	Allow delinquency freeze settings by Membership Designation
61791	Add open dates to the Loan Productivity Analysis dashboard
62174	Requested documents – Support for last 10 account selection
62358	Account cross-reference enhancement for GOLD integration and BizLink 247 SSOs
62431	Removing gender from various dashboards

Product: **CU*BASE**	Determine release content	**November 5**
	Tool request deadline	November 22
	Beta selection period	-
	Technical Release Review	November 19
	Internal notification	November 25
Release #: **24.12**	Beta training	-
	Beta start	-
	Release summary to CUs	November 18
	Client training	
Release type: Year-end release	Release date for: • **Online** • **Site-Four** • **Self-Processing**	**December 8**
Beta clients: –		

Proj#	Description

Targeted/planned for this release but not yet confirmed as feasible:

Proj#	Description
TBD	IRS Publication changes as published

Other "Squeaky Wheel" Projects in the Pipeline to Track

These are projects not already slated for a release but where a project champion has asked that these get attention as soon as possible.

Proj#	Description
58655	FNMA file expansion (another project for deferments related and will need screen changes)
58544	API for MessagePay to receive or send loan/share information
59137	Create Payrailz Bill Pay Platform – SSO
59436	Correct credit pull program from adding additional manual pulls on system
59522	Correct AFT payments for 360 mortgages when set to pay regardless of other payment to pay principal only when current instead of calculating interest

Proj#	Description
60572	Enhance the Search Feature When Reviewing Account Transactions in Online Banking
60738	Add CU selection screen to Print Statement Control Reports
61252	Create a process to import Mortgage Statement Mailing Audit from SAGE Direct
61371	Change A/P check disbursement to follow appropriate GL for configured bank ID
61482	Add eSign Feature to Auto-Approved Flex Loans in Online Banking
61645	Enhancement to Transaction Patterns for Abnormal Activity
62015	Add full MICR to the Account Details screen in online banking
62565	Update 5300 Call Report ratio calc with Total loans
62628	CU Form – Support for Loan Fields
62711	Qualified dividend correction for settings for POS only and looking at all accounts
62745	Adjust the next payment date to Profitstar ALM loan file
62803	Create New Routine to Capture PMI and Property Tax Information for Reporting on 1098 Tax Form
62897	Payment Change Calculation Adjustment for Insurance & Debt Protection Premiums
63000	Fix to Xpress teller configuration tables
63192	Research to determine transactions making up last disbursement balance
63301	Adjustments to Mini-contract variable rate loans when introductory rate expire
63387	Contract Variable Rte change notice next payment date issue
63411	MemberPass - allow CU to configure authentication text
63470	Revamp Statement Message/Insert Instructions for month/year format
63476	Update default view in Tool #982 to show balance on loans first (also changes the default sort order)
63520	Add logic in call for custom MISC to get the correct account suffix