

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

2023 Releases

Product: CU*BASE	Determine release content	Nov 7	
	Beta-selection period	n/a	
	Technical Release Review	TBD	
	Beta training	n/a	
	Beta start	n/a	
	Tool database blackout	Nov 24-Dec 10	
	Release summary to CUs	Dec 4	
	Client training	n/a	
	Release type: Year-end/tax, GOLD update	Release to Online CUs	Dec 10
		Release to Site-Four	Dec 10
	Release to Self Processors	Dec 17	
Beta clients:	N/A		

Proj#	Description
60274	Change to s/b phone transfer to obey s/b field in MASTER
60908	Create internal tool to delete APY record for mergers
61083	Create a CU*BASE Integration with MemberPass
61546	Incorporate A/P 'from' e-mail into Master CU email Address Config
61967	Remove option 'Send Forms to my eDoc server' from tax order form
62595	Added VanWagnen to the CPI vendor option in Master Parameters

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

Proj#	Description
61370	Change to tax reporting for foreign citizens
61387	Change to combine CU files for tax reporting
62135	Imaging changes for 2023 tax form display

Product: Analytics Booth	Determine release content	10/02/23
	Release Summary to CUs	11/20/23
	Release Summary to CUs (Reminder)	11/27/23
	Client Training (Pre-release)	12/06/23
	Release to all AB Subscribers	12/10/23
Release #: AB_23.12	Client Training (Post Release)	12/13/23
Beta clients:		

Proj#	Description
61836	Modifications to Trends and Trends Peer Comparison pages
61837	Modify User Preferences for General Settings
62073	Enhance Member Management CU Admin Page
62140	Create new alert and report workflow to eliminate errors in configuration
62209	Update the average line on trend graphs after changing the day of week filter

2024 Releases

2024 CUBASEPTF → CUBASE Annual Merge		Sunday, January 28 th
CU*Answers and Site-4 Online CUs Only		

Product: <h1 style="margin: 0;">CU*BASE</h1>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Determine release content</td> <td style="width: 50%; text-align: center;">February 6</td> </tr> <tr> <td>Tool request deadline</td> <td style="text-align: center;">March 15</td> </tr> <tr> <td>Beta selection period</td> <td style="text-align: center;">February 13 – 27</td> </tr> <tr> <td>Technical Release Review</td> <td style="text-align: center;">March 12</td> </tr> <tr> <td>Internal notification</td> <td style="text-align: center;">March 18</td> </tr> <tr> <td>Beta training</td> <td></td> </tr> <tr> <td>Beta start</td> <td style="text-align: center;">March 24</td> </tr> <tr> <td>Release summary to CUs</td> <td style="text-align: center;">April 16</td> </tr> <tr> <td>Client training</td> <td></td> </tr> </table>	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	Beta training		Beta start	March 24	Release summary to CUs	April 16	Client training	
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Release #: <h1 style="margin: 0;">24.05</h1>																			
Release type:	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;"> Release date for: <ul style="list-style-type: none"> Online Site-Four Self-Processing </td> <td style="width: 50%; text-align: center; background-color: #ADD8E6; vertical-align: middle;">May 5</td> </tr> </table>	Release date for: <ul style="list-style-type: none"> Online Site-Four Self-Processing 	May 5																
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Beta clients:																			

Proj#	Description
58984	Allow FIDM process to be run for all group providers or a single group provider
59912	Add Export feature to various reports/dashboards in CU*BASE
60413	Fields added to the Dealer configuration
60716	Expand new member comment to allow CU to customize
61134	Update the Account suffix configuration tool
61483	Enhancements to the Concentration Risk Analysis Dashboard
61524	Participation Loan Reports Export
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

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

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

Proj#	Description
58071	Batch account adjustment posting
58074	New Option to pay escrow analysis surplus funds by check
58075	Add separate card order address captured and stored with card order
58827	New Email notification process for incoming online banking requests
59075	Modify all programs using vendor name to pull from ISOVEND and ISOCUVND fields
60055	Create credit limit field to define the max amount a member can overpay credit card loans in online banking/ARU
60092	Handling Principal Curtailments on Interest-Only Loans When Late Payments are Received
60108	Add ability to have on-demand ACH fee be covered by incoming deposit
60595	Update to ACH distribution to add OLB maintenance lock flag and account lookups
60615	Integration with AFT lease/balloon calculator product
60647	1 Click Unfunded Loans
61133	Standardize the GL Account Control Configuration
61275	Add loan category setting to prevent selected Credit Card accounts to be used as overdraft protection
61537	Phase 2 Enhancements to Package Loans to be sold

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 #:		
24.10	Beta training	
	Beta start	August 25
	Release summary to CUs	September 16
	Client training	
Release type:		
	Release date for:	October 6
	• Online	
	• Site-Four	
	• Self-Processing	
Beta clients:		

Proj#	Description

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

Proj#	Description

Product:		
CU*BASE	Determine release content	November 5
	Tool request deadline	November 22
	Beta selection period	-

Release #: <h1>24.12</h1>	Technical Release Review	November 19
	Internal notification	November 25
	Beta training	-
	Beta start	-
	Release summary to CUs	November 18
Client training		
Release type: Year-end release	Release date for: <ul style="list-style-type: none"> • Online • Site-Four • Self-Processing 	December 8
Beta clients:	-	

Proj#	Description

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

Proj#	Description

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
55639	Online LOS Improvements Part 1: Managing the Loan Queue
56230	New IRA Direct integration with Ascensus
57952	Add option to loan category config to prevent loan payoff via online banking
58485	Digital Issuance Co-op real time card add
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
58785	Creation of ACH Direct SSO for MagicWrighter
59245	API for RePay
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
59611	Prevent on-demand posting option showing available for records with stop payment codes entered
59698	Prevent fee posting when batch process stops on-demand post
60572	Enhance the Search Feature When Reviewing Account Transactions in Online Banking
60664	Native Receipts for ALL channels
61252	Create a process to import Mortgage Statement Mailing Audit from SAGE Direct

Proj#	Description
61351	Freddie Mac settlement processing change for paid ahead payments
61482	Add eSign Feature to Auto-Approved Flex Loans in Online Banking
61645	Enhancement to Transaction Patterns for Abnormal Activity
61695	Native Receipts for Co-op shared branching
61943	Adjustment to Text Banking workflow warning messages
62015	Add full MICR to the Account Details screen in online banking
62130	Add Verify Credit Union "From" Email Domains for SPF/DMARC/SKIM settings
62252	New canned query giving access to the NSF transaction table
62540	Correct the new reset printer functionality that is not working for credit unions
62576	Correction to escrow check print issue